

# Organizing in Systems:

Using Systems Thinking in Social Movement Organizing

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# Abstract

Protest movements calling for justice and policy change within our current systems of governance, economics, politics, and social life have been regular news generators for decades – but so many of the interventions exist merely at a symptomatic level, rarely a systemic one. The standard protest tactics are no longer enough to produce the kinds of radical change that are required to save life on this planet, even if they are what grabs media headlines and public attention.

As we stand at the edge of systems collapse as a result of ecological degradation and an economic system pushed to extremes, the interconnectivity of injustice and social movement activity is perhaps more apparent than ever before. Without radical and transformational change, we risk life on our planet. Presented in this research are the concepts, case studies, and real-world practices that cross the domains of systems thinking, social movement studies, and design to present a framework for organizing people within social change movements to affect transformational awareness, capacity and contribute to deep systems transformation frameworks.

# Land Acknowledgement

#Landback

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And thank you to the long line of thinkers, doers, makers, and shakers who see the world as it is and stand boldly in their conviction that something can be done. We face a crisis of life on this planet, and those who see joy, community, and possibilities in the madness are the reason for this work.

To a messy, possible, flourishing future.

# Table of Contents

<b><i>Reproduction of Work.....</i></b>	<b><i>2</i></b>
<b><i>Abstract .....</i></b>	<b><i>3</i></b>
<b><i>Land Acknowledgement.....</i></b>	<b><i>4</i></b>
<b><i>Acknowledgements .....</i></b>	<b><i>4</i></b>
<b><i>Table of Contents.....</i></b>	<b><i>5</i></b>
<b><i>List of Figures .....</i></b>	<b><i>7</i></b>
<b><i>Introduction .....</i></b>	<b><i>8</i></b>
<b><i>Social Movements Considered.....</i></b>	<b><i>9</i></b>
The Convoy and Contemporaries .....	9
Where are They Now: Rationale.....	9
Research Question.....	10
<b><i>Key Terms.....</i></b>	<b><i>11</i></b>
<b><i>Background .....</i></b>	<b><i>12</i></b>
Social Movements & Systems Thinking.....	13
Frameworks for Social Change Organizations .....	15
Cybernetics & the Organizer .....	18
Consciousness in Social Change Movements.....	20
Tactical Choice Framework .....	22
Structures of Organizing .....	25
Coalition Building in Social Change .....	28
Identity in Organizing .....	30
Conflict Transformation for Social Change .....	32
Storytelling in Social Change .....	34
<b><i>Methods.....</i></b>	<b><i>36</i></b>
Research & Design Process: The Double Diamond.....	37
<b><i>Movement Analysis .....</i></b>	<b><i>41</i></b>
Approach .....	42
Gilets Jaunes (Yellow Vests) .....	43
CUPE Education Workers Protest (2022) .....	50

Extinction Rebellion .....	57
Archetypes in Social Movements.....	66
<b><i>Consulting with Systems Change Makers .....</i></b>	<b><i>71</i></b>
Systems Change Makers .....	72
Experience & Expertise: Systems Thinking in Social Change.....	73
<b><i>Synthesis .....</i></b>	<b><i>76</i></b>
The Medium is the Message: Tactics & Organizing.....	77
E5: A Framework for the Everyday Movement.....	83
E5 in Contemporary Social Change Movements .....	86
Experimenting with the Future.....	94
Limitations to this Research Project .....	95
<b><i>References.....</i></b>	<b><i>96</i></b>
<b><i>Bibliography.....</i></b>	<b><i>97</i></b>

# List of Figures

Figure 1: How Tactical Frameworks Contribute to Social Movements.....	24
Figure 2 Double Diamond Research Process .....	37
Figure 3 Johari Window for the Gilets Jaunes.....	46
Figure 4 Ecosystem Governance Model for Gilets Jaunes. ....	48
Figure 5: Systems Actors Map for CUPE.....	53
Figure 6: Ecosystem Governance Model for Ontario CUPE Education Workers. ....	55
Figure 7: Johari Window for Extinction Rebellion.....	60
Figure 8: Actors Map for Extinction Rebellion .....	62
Figure 9: Ecosystem Governance Model for Extinction Rebellion.....	64
Figure 10: Growth and Underinvestment in Social Change Organizations .....	66
Figure 11: Success to the Successful .....	67
Figure 12: Fixes that Fail.....	68
Figure 13: Limits to Growth .....	69
Figure 14: Shifting the Burden .....	69
Figure 15: Drifting Goals.....	70
Figure 16: E5 Framework - Elite Power Test .....	84
Figure 17: E5 Framework - Catalyzing Event.....	85
Figure 18: E5 Framework - Moment of Concession.....	86
Figure 19: E5 Framework Applied .....	87

# Introduction



# Social Movements Considered

## The Convoy and Contemporaries

In the Winter of 2022, the Freedom Convoy mobilized supporters across Canada and announced their intentions to occupy the streets of Ottawa outside Parliament Hill. Originally, their stated aims were to protest a COVID-19 vaccine requirement for freight truck drivers crossing the border between Canada and the United States, but many supporters and demonstrators who ended up in the streets of Ottawa and blocking major trade routes were those who wanted to also take aim at pandemic health restrictions that they saw as curbing their freedoms (Aiello, 2022). In late January, they arrived and held their position until the Emergencies Act was declared, for the first time in its history, by Prime Minister Justin Trudeau, on February 14, 2022.

My interest in this mobilization arose in the all-consuming coverage across Canadian media during the two-week occupation of the nation's capital and marked what was considered an "unrivalled" (Ling, "5G and QAnon," 2022) coordinated effort across groups advocating for a variety of causes predominated by anti-government sentiments during COVID-19 pandemic health restrictions and policies. This action provided the proof that a small minority in protest action can overwhelm public services, grind cities to a halt, and influence the functionality of major infrastructure. But then what?

And if the Freedom Convoy is not a mobilization that the average social movement would like to learn from, they are not the first group to demonstrate this kind of support. The Gilets Jaunes in France, Extinction Rebellion in the UK, and Black Lives Matter protests in the US amassed significant support at various moments in the preceding three years through public demonstrations of protest and civil disobedience while the media churned out weeks of headlines covering their actions.

But the claims and demands communicated to the broader public were surface-level and what felt like anticipated long-term change has failed to come to fruition. These causes share common event cycles: an instigating spark that catches fire quickly, burns brightly, and then results in diminished public engagement and awareness. But this rarely means that these causes or their constituents have disappeared. Organizations and organizers who had been there, advocating for the kinds of change that felt tangible in these emotional swells of protest, continue to work long after the cameras have gone.

## Where are They Now: Rationale

As an outsider looking in, searching for sustained momentum, I wanted to know what opportunities

existed for social movements and these organizations who have been around and will be around, regardless of the news cycle, to take advantage of catalyzing moments and engage wider public awareness and activity, while still prioritizing long-term systemic and transformational change to dismantle the current system and build something truly suitable to sustaining life on this planet.

The purpose of this research is not to remove common tactics, such as protest and civil disobedience from social movement repertoires, or to suggest an overhaul of organization operations. Instead, what I hope to demonstrate is the value in a framework that can be used to build transformational awareness and capacity using systems logic in order to sustain social movement efforts through the ups and downs of standard protest and reform cycles that have marked social movements across time, geographies, and causes (Tarrow, S. 1988).

In these moments of public demonstration and media headlines, there appears to be opportunities for meaningful and transformational change, which is described not as improving the current system, but the redesigning a new system through collaboration and generative thinking (Jacobs, 2016) that arises to counter the precarious situation of a world fuelled by capitalism and colonialism, pushed to the extremes of growth, no matter the cost. These opportunities, I believe, may rise from using the tools of systems thinkers to apply new lenses and approaches to social movements and organizations who comprise these networks, advocating for a desirable and flourishing future.

## **Research Question**

With this context in mind, this research project aims to answer the question:

What strategies, informed by systemic design, are effective for understanding and guiding social movement organizations?

To provide context and to support the aims of this question, a series of sub-questions are relevant to the work and will be explored:

How do social movements understand their activities as interventions within these systems?

How do social movements organize around and within these systems?

What movements use systems logic and how does this help grow movements and grow impact?

# Key Terms

Systems Change: Uncovering and addressing the root cause of a problem with a coordinated series of interventions by individuals or organizations that alter the status quo and promote a flourishing future.

Transformation: Instead of attempting to fix the current system, the coordinated and deliberate efforts associated with re-design something new.

Symptomatic Change: Surface-level changes in policies and procedures that avoid addressing a root cause and prevent transformational change.

Systems Change Organizer: An expert in the field of systems thinking and social movement organizing who works within a cross-section of movements to produce transformational change.

Protest Cycle: The ebbs and flows of movement activity, public attention, and change potential.

Network: Non-hierarchical, relationship based organizing structure where affiliations are loosely defined without formal membership.

Organization: Formalized structures with an order that includes membership, hierarchy, rules, and functions for monitoring members.

Institution: Rigid, rule-bound structures often perceived as permanent and unchangeable.

## Background

## Social Movements & Systems Thinking

Plenty of research has gone into social movements, particularly through the 1960s with strong civil rights and anti-war movements dominating headlines. From these movements, and those preceding, academics who have concerned themselves with these trends have emerged with concepts that easily apply to today's headlines as well.

Charles Tilly and Alessandra Pizzomo contributed to defining the characteristic waves of movements dating back hundreds of years, that have since been dubbed “cycles of protest” when conflict rings out across social and geographical barriers to engage various social movement organizations (SMOs) to call for change (Tarrow, 1988). These cycles of protest highlight moments of “contentious politics” which are defined as “episodic, public, collective interaction among makers of claims and their objects” (McAdam et al, 2001, p. 5) and encompass more than just protest, extending into the realm of revolution and localized claims-making against institutionalized governing bodies. These cycles of protest in contentious politics rise and fall, and social movement organizations who were established before these swells carry on or evolve typically by institutionalizing their approaches or escalating their tactics (Tilly & Tarrow, 2015). But these are not linear cycles, and there are many opportunities for iteration in tactics and organizing approaches, mobilizing new identities through collaboration, and evolving to form new action arenas (McAdam et al, 2001) if only the work is put in to understand the environment of the movement. This is where systems thinking and design come to play.

These shifts in strategy could be supported by more systemic and deliberate experimentation with opportunities for learning baked in – and there is historical precedence to support these ideas. Considered the founding father of general systems theory and cybernetics, Alexander Bogdanov was also a well-known political activist with the Bolsheviks in Russia. His *Tektologiya*, published in 1922, drew from his experience and his philosophies to provide an analysis and suggestions for understanding the ways in which systems form, function, and fail in crises (Gorlic, 1986; Lepisky & Malakhova, 2022).

Another prominent thinker who was also deeply involved in the peace movement was Kenneth Boulding, who was a co-founder of the Society for General Systems Research, now known as the International Society for the Systems Sciences (ISSS, 2023). His research, writing, and activities in the peace movement paved way for perspectives on future economies that did not rely on war (Kerman, 1972; Agger, 1946) but also considered the earth as a closed system and that limitless growth was not sustainable (Boulding, 1966).

And in today's landscape of social system change, Otto Scharmer and Peter Senge are significant

thought leaders, building organizational awareness from a systems approach, and applying their concepts like Theory U and action-based research to organizations who are active within social movements, focusing on shifting from fighting the established systems and instead “co-sensing and co-shaping” the new (Scharmer, et al., 2020, p. 1).

There is significant value and opportunity in working to deliberately join the foundational concepts and activities presented in social movement analysis and the design disciplines that focus on systems thinking to understand how social movements rise, fall, and the ways that they can organize for transformational systems change.

# Frameworks for Social Change Organizations

In the context of social change, framing can be used by organizations to both understand and to grow the movements they operate within. These two areas are not mutually exclusive, and in fact, a case can be made that an organization looking for long-term, strategic approaches to change the status quo will use both methods in tandem to grow their impact and their understanding of the ecosystem.

## Foundational Frameworks

When studying social movements, researchers look to understand the frameworks by which potential constituents will be mobilized through the “interpretive packages” that organizers formulate to achieve their goals (Polletta & Jasper, 2001). How successful these frames will be is likely a result of four framing efforts throughout the course of a movement’s activities, as defined by Snow & Benford (1988): “robustness; structure of movement belief and ideational alignment; relevancy to the life of the participant; and the position of the movement in ‘cycles of protest’ (citing Tarrow 1983).” (p.199) These efforts, whether conscious processes in an organization or not, will aim to elucidate on what is and what is not within the scope of influence for a movement in addressing the who, what, when, where, why and how of the tactical methods deployed by system actors to bring about change as well as their overall effectiveness at growing the movement through participant mobilization.

## Crafting Frameworks

But it is not enough for an organization to understand the interpretive packages – they must actively craft them as well. To address participant motivation, Snow & Benford (1988; Benford & Snow, 2000) identify three core framing tasks worth understanding in both a theoretical and a practical sense. The first, diagnostic framing, seeks to address the source of the problem but does not necessarily ensure consensus on the nature of the problem (Benford & Snow, 2000). We see this in situations where the current ruling party of a government institutes a policy that is unfavourable. While the broader movement may accept this policy as unacceptable, the nature of the problem may not be so easily agreed on as some may blame the current ruling party while others may take issue with the structure of government altogether. This is the difference between symptomatic and systemic diagnoses.

This is where prognostic framing comes in as social movement organizations seek to provide solutions (Snow & Benford, 1988). Solutions are what differentiate the organizations from each other (Snow & Benford, 2000), likely based on conclusions from the nature of the problem which Snow & Benford (1988) categorized as being technological, political, economic, or moral.

These activities together should result in a compelling case for injustice and make a strong assertion in the power of “collective agency in changing that condition” (Polletta & Jasper, 2001). These concepts are echoed in the work of Spinoso et al. (1995), who puts forward that in democratic entrepreneurship, which includes the functions of social movement organizations, interpretation of the situation and the required action to facilitate change is necessary and must be followed up with action and learning processes to test and evolve these frames (p. 25). This is where the third core framing task comes in.

## **Frame Resonance & Motivation**

Motivational framing is a “call to arms” and relies on resonance (Benford & Snow, 2000) to inspire current and future participants in the movement to extend beyond diagnostic and prognostic framing and into action (Snow & Benford, 1988). Frame resonance relies on credibility that is built up through consistency and credibility from frame articulators as well as the proof at which they arrived at that frame while salience in framing comes from “narrative fidelity” and the lived experience of those that the movement is attempting to reach (Benford & Snow, 2000). If the message of a movement or an organization resonates with the public, greater support can be gained.

## **Challenges and Considerations**

There are challenges that present themselves throughout the core framing activities, particularly if there is too much of one and not enough of another. If there is too much work invested into diagnostic framing, but not enough in prognostic or motivational framing, stagnation is likely to result (Snow & Benford, 1988). Another challenge may arise from prognostic framing within organizations that comprise social movements. If the movement or more influential organizations do not allow for diversity of tactics and interventions and instead try to impose universal activities across the board, conflict and disputes may arise that can limit the impact of a social movement’s resonance with the general public and new constituents (Benford & Snow, 2000). In order to combat these challenges, movements will likely have to find ways to build saliency and credibility in iterative and innovative ways to protect foundational work of the movement.

Counterframing (Bendord & Snow, 2000) is a consideration that should also be made in social movements and their contributing organizations. Counterframing arises from social movements or in opposition to the social movement and its stated frames. This is not so much a misalignment on stated values or interests, so much as it is an incongruous perception on the problem source, the solution, and the tactics needed. So where something like a left vs. right binary might exist and cause conflict between



a movement that is “for” something and one that is against it, counter framing can happen within the movement itself. Two sides can be fighting for the same end goal but disagree considerably on the method by which to arrive at that point.

## **Opportunities**

Innovative opportunities exist, particularly in the space of hybrid organizations and frame extensions (Snow et al., 1986, as cited in Heaney & Rojas, 2014). If a movement can connect the dots with saliency and credibility between problems and solutions that address the needs and interests of multiple social groups, the greater the “mobilization capacity of the frame” (Gerhards & Rucht, 1992, as cited in Benford & Snow, 2000) and the more likely it is that frame application and transformation may arise to spark new ideas, new solutions, and new tactics.

For long-lasting and transformative change, it is likely not enough to rely just on the framing processes and products of individual social movement organizations to garner support or to use frames as a tool for analysis of the movement’s impact. Instead, both of these processes should occur simultaneously and should be led by the movements and organizations themselves. This willingness to look both at the system and at one’s place within it as an active participant is where second order cybernetics can be used to better understand social movement organizers.

# Cybernetics & the Organizer

It would be the rare organizer who finds themselves presented with a problem that does not see themselves as part of the solution. This is, plainly speaking, what separates the organizer from the non-organizer and even the activist. When presented with the state of things as they are, the non-organizer may acknowledge the issue, may even propose solutions, but acts in ways that preserve the system's standard operating procedures. They understand and accept the system as it is. This distinction helps to explain and understand the differences between first and second order cybernetics and how these frameworks for working within social change systems can be used to understand spaces for organizing within social movements.

Cybernetics is, as Stafford Beer (2002) claimed in his address at the University of Valladolid, "an interdisciplinary subject" (p 211). Named by Norbert Wiener in the 1940s, cybernetics is the study of the ways in which complex systems may exert control and affect predictable outcomes through communication as feedback (Beer, 2002; Glanville, 2004). This study aims to understand, objectively, how viable systems reinforce and protect themselves, and is referred to as first order cybernetics. Within this framework, these systems are also defined very clearly by their observed goal (Glanville, 2004). For those familiar with the scientific method, the distance provided to the observer of the system who insists on their separation from it, will feel familiar with the first order level of analysis.

This first level, in the context of social change movements and contentious politics, upholds the systems that the organizer typically aims to change, break, or replace. This upholding happens, as Heinz von Foerster (2003) describes, when cognitive awareness has been removed and "the observer is reduced to a copying machine with the notion of responsibility successfully juggled away" (p. 20). This removal of responsibility relates directly back to the inaction that separates the organizer from the non-organizer or even the activist. Think, for instance, of the policies in place in most democratic governments that allow for peaceful protest or even voting. Demonstrations of displeasure with the current ruling party may be exercised as functions of the established system, while those who organize to disband and propose new systems see themselves as actors for true change.

This brings us not to the flip side of first order, but instead to the next level of understanding the activities of a complex system. Second order cybernetics is often presented as the cybernetics of cybernetics or as the understanding of understanding which means that the presence of the observer of a system is acknowledged rather than ignored, and their presence is given a place within the system (Glanville, 2004). This framework will feel familiar to the organizer who sees themselves as part of the

ongoing experimentation with interventions in the current system to build towards an imagined future state.

The importance of having an understanding of Second Order Cybernetics in the context of organizing for systemic and transformational change is a reminder that without seeing one's self or one's organization as a part of the system, it is impossible to change the system with any long-term and sustaining effectiveness. As the strings of wicked problems are tugged at, and as new knots form, the cybernetician as organizer understands their role in this detangling and in the unintended consequences of what it means to pull at these strings and uncover further complexity. As Heinz von Foerster (2003) says, "the cybernetician, by entering his own domain, has to account for his or her own activity." An organizer, a systems thinker – neither of these identities can see themselves as working outside of the system or as an evolved actor who has moved beyond the system. They must work within to unravel and re-build, always acknowledging and learning from the results of their activity.

# Consciousness in Social Change Movements

What supports the transcendence from activist to organizer? To change the way a system operates, to intervene, there must be a moment when a participant within the system identifies that something is not working and that they could be the one to change it. It could be an awakening, an epiphany, or a moment of simple “aha!” but it must occur. Here it is worth considering the act of coming to consciousness through these moments and how a framework to drive a raising of consciousness might be established to support the goals of social change movements.

## Societal Consciousness

There are three levels in which we have to analyze consciousness: societal, communal, and individual. Societal consciousness would result in a paradigmatic shift and is the goal of movements who are looking to make transformational systems change. This means that the actors who are intervening in the current system must aspire to change the consciousness of participants (Scharmer, et al, 2021), organizationally and individually. Citing Otto Scharmer and Katrin Kaufer, Senge et al. (2015) share three “openings” that are required for systemic social change which include “opening the mind (to challenge our assumptions), opening the heart (to be vulnerable and to truly hear one another), and opening the will (to let go of pre-set goals and agendas and see what is really needed and possible” (p. 29). The first addresses the level of the individual while the second and third level address community and organizations.

## Individual Consciousness

Although applicable at the organizational level, Marty Jacobs (2018) draws from several key theories such as the transformative learning theory, logotherapy, and constructive developmental theory to propose a framework for “meaning making at the edge of chaos” at the individual level. Jacobs defines meaning making as a “process of reflecting on and adapting the new information from a disorienting dilemma into a more inclusive worldview” (p.17) by acknowledging that such an experience is shared. This disorienting dilemma could account for the beginning of the coming to consciousness. What is compelling about his particular approach to meaning making is the inclusion of Viktor Frankl’s concept of logotherapy which is a focus on future-oriented (Frankl, 2006, p. 98) meaning making that guides an individual to look beyond themselves with responsibility to others (Frankl, 2006, p. 109). The inclusion of logotherapy as a call to find one’s purpose in their actions supports the notion of individual consciousness as being important to building towards communal and systems consciousness for social

change.

This purpose, and a recognition of responsibility for shared contributions to a goal larger than oneself is a requirement for consciousness-raising and entering into the next level of consciousness that addresses the community for shared transformational learning and capacity building.

## **Communal Consciousness**

To understand the importance of community and consciousness in the progress of a social change movement, Otto Scharmer identifies a requirement for consciousness through dialogue as an inherent component of systems thinking and systems change (Howard, S. 2015, 14:00). Dialogue requires at least two participants, either at the individual level or organizational level, to participate in an exchange of ideas that help move people from an “I” mentality to a “we” mentality. This dialogue enables the system to see itself — a requirement for transformation of consciousness and systems change that is far-reaching and enduring (Scharmer, et al, 2021), reflected in the differences between first and second order cybernetics.

And it is not only the organizations that make up social movements that can benefit from this work to shift consciousness. Institutions like the media and political systems can also be transformed with more opportunities for consciousness-raising. Without them, “we are unlikely to lift ourselves out of the confusion of constantly reacting to events as if the future is not in our hands” (Adnan, 2021). This, however, is unlikely to mean changing these deep-rooted institutions themselves, but using individual and communal processes to create new avenues for stories to be shared and decisions to be made that are rooted in commitment to understanding each other.

## **Without Consciousness**

Without a rising of consciousness or a call to a greater purpose, the interventions that social movements advocate for within the current system will result in a blip of systemic interruption and an awareness among the broader public that something is not working — but ultimately, the system will preserve itself and constituents of a movement will absorb themselves into the system once again (Tilly and Tarrow, 2015). Consciousness is required to move from the knowing model of first order cybernetics to the doing model of the second order (Scharmer, et al, 2021) with intention and an eye on true transformational change. Consciousness bridges the gaps between a current world and a new one and provides avenues to explore tactical opportunities for creating this change.

## Tactical Choice Framework

It is worth considering frameworks in which tactical interventions can be organized and analyzed not necessarily in terms of effectiveness, but in how different tactics arise within different contexts, and how they may each fit together to produce long-term impact. This may also help to address the ways in which different movements and their approaches to achieving their strategy for change align with current systems that they aim to uphold or future systems that they aim to create.

## Political Opportunity Structure

One framework for analyzing social movements and the tactical approaches available to participants is the political opportunity structure that uses filtering processes as outlined by Kriesi (2007) to understand why an individual or organization might act in the way that they do. The first filter involves looking at the environment of the individual, and in particular, the constraints that are placed on that individual that narrows their options for tactical interventions. These constraints can include their “interests, preferences, values, action intentions, or goals” (p. 68). The second filtering activity is the “mechanism that determines which action within the opportunity set will actually be carried out” (p 68). Both filtering processes distinguish between structures, configurations of power, and interaction contexts” as the variables for analysis (p 69). This framework functions predominantly in the current system of political opportunities for individuals, with the first filtering layer often imposing a set of defined variables that require or limit the options to a very specific tactical toolkit. This helps a participant determine their preferred tactical style and find organizations or opportunities within the social movement to exercise those preferences.

## Five Archetypes

The second framework that contributes to the second filtering action in the political opportunity structure framework helps to explain tactical choice of individuals and organizations within a movement — and acknowledges the importance of making space for each. Waddell’s (2018) archetypes or strategies for transformational systems change, later elaborated and refined in Waddock & Waddell’s book, *Catalyzing Transformation: Making System Change Happen* (2021). The four archetypes arose out of a two axis consideration: one that identifies strategies between confrontation and collaboration, and the other that identifies strategies interested in destruction or creation. This resulted in four quadrants, representing activity profiles for understanding tactical approaches in social movements. These four archetypes are the Entrepreneur who does change, the Warrior who forces change, the Pathfinder who

directs change, and the Lover who co-creates change. A fifth archetype was later developed to compliment these four, known as the Healer (Waddock & Waddell, 2021).

The Entrepreneur, as a doer of change, endeavours to create new innovations that can give rise to change. The Warriors engage in civil disobedience to try and force change. The Pathfinders are the only change makers who operate inside of the structures that make up the current system to facilitate progress in policy and can implement the innovations of the Entrepreneur to break up the old. And the Lovers are the actors who believe bringing everyone together to co-create change that benefits all is a strategy to pursue. The Healer encourages harmonization among the other identities represented in the archetypes. Each profile carries distinct characteristics, activities, and identity resonance that can be helpful for organizations to understand to support attraction of new members, or to make connections in areas they do not typically perform within.

## **Robust Action Framework**

The third tactical framework to consider is Ferraro's (2015) Robust Action approach and considers a pragmatic lens that deliberately reaches across field domains in grand challenges, or wicked problems. This approach aims to not just address solutions, but also to illuminate pathways for action — but in a way that takes into account inter-woven movements and goals for tackling systemic ailments. The first layer involves a structural component that allows stakeholders and participants to gather in a physical or digital capacity and allow for maintenance of the movement over time. This gathering allows information to be passed between participants. The second layer allows for information to be translated into “tangible forms” (p 373), while the third layer insists on bringing these two layers together into action and experimentation. Where this framework and approach to strategizing within a movement is worth reflecting on is in the power of “distributed action” (p 373) across organizations that increases likelihood for success in the movement.

## **The Systems Lens**

Each of these frameworks contributes a layer of understanding for how social movements and change organizations may be able to analyze and understand their tactics to not only decide on the best course of action, but also in which to communicate their tactical approaches and advantages between organizations and to participants. For transformational change to take place, a diversity of tactics is needed, but understanding how they work together and in what contexts they are appropriate, considering the identities and geographies of those involved, is also a requirement.

The political opportunity structure provides a lens on how the current systems can create barriers or opportunities to individual participant mobilization and guides their decision making in the sorts of organizations and networks they are most likely to join. The five archetypes for transformational systems change very specifically defines tactical strategies that may support frame resonance and narrative development among participants and how a combined effort from each is required for transformational change within a movement. At the macro level, the robust action framework acknowledges that grand challenges and wicked problems require many approaches from across movements and that making space for each strategy to coordinate their activities to address these problems can come to fruition through organizational connection and collaboration.

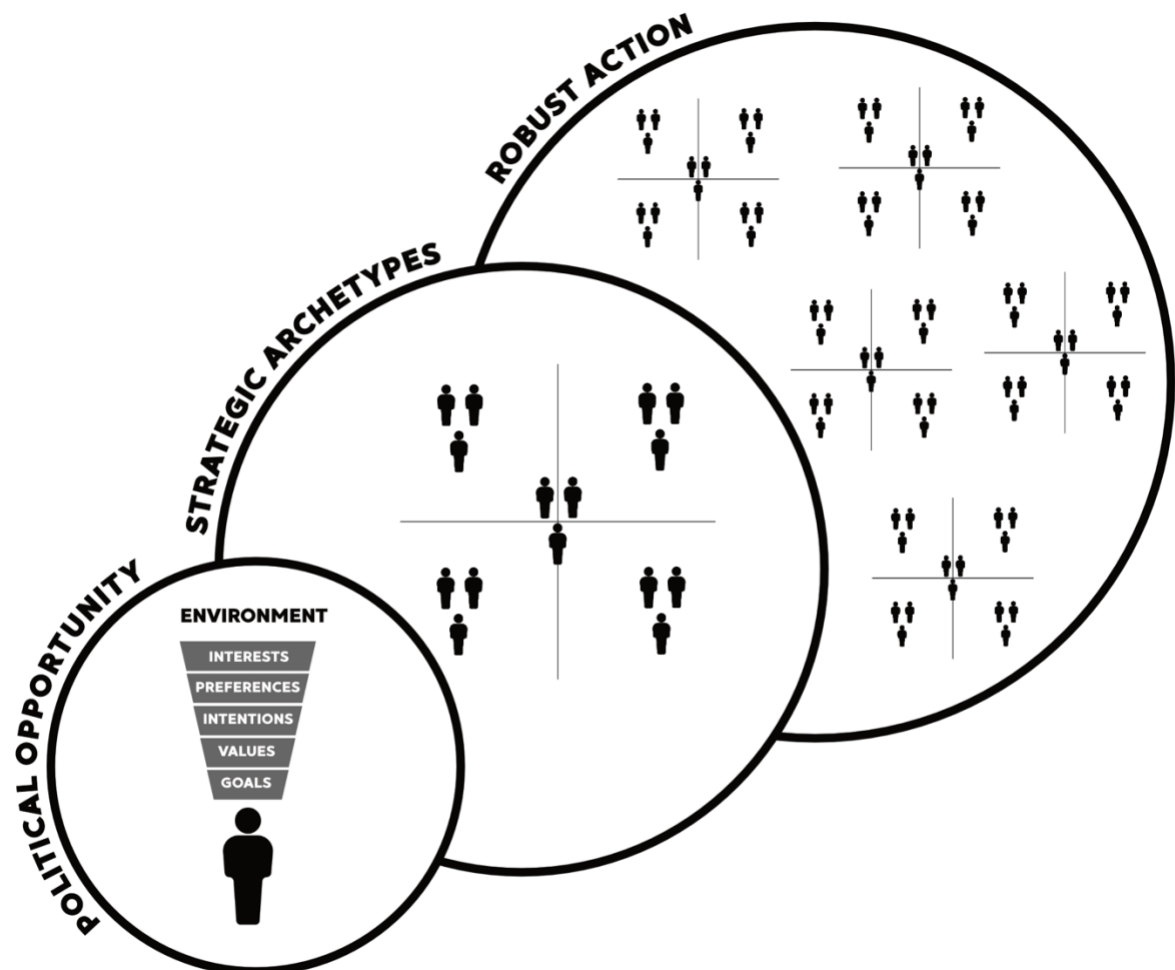


Figure 1: How Tactical Frameworks Contribute to Social Movements



# Structures of Organizing

The activity of actually providing structures of organizing in social movements often result in rigid containers for understanding how certain groups set out to achieve desired results and contribute to a greater vision. These containers have most often included analysis through networks, organizations, and institutions within the movement field, but there is opportunity to explore beyond these standard frameworks and provide new lenses by which to view their value in a movement's cause.

## Standard Containers for Understanding Social Movements

The network as the first container, is the most informal container, but is critical for recruitment into the movement and into the organization who rely on mobilized constituents (Polletta & Jasper, 2001). Networks rely on relationship building, reciprocity, and trust to sustain engagement (Ahrne & Brunsson, 2011; Haug, 2013). They are the non-hierarchical links between social actors (Ahrne & Brunsson, 2011) whose contributions help to shape and advance the movement's vision and strategic goals by building community (Heaney & Rojas, 2014), based on the identities of those recruited.

But networks connect more than just individuals — they connect organizations, as well. The second container of organizations are more formalized structures with a “decided order, including one or more of the elements of membership, hierarchy, rules, monitoring and sanctions” (Ahrne & Brunsson, 2011, p.84). The key focus here for Ahrne & Brunsson is the act of deciding, as decisions made in social movements to form new organizations are almost universally a decision to go against the status quo of established institutions that are perceived as unchangeable norms.

These institutions are the third container. Institutions are rigid, rule-bound structures there are often assumed to be natural orders (Ahrne & Brunsson, 2011). However, there are institutions that exist within social change movements, particularly in labour organizing with unions playing key roles in the bargaining for collective rights and providing space for a shared identity. It is worth noting that in this case, these institutions are permitted to exist through the same institutions in which the movement itself is attempting to change. For true change, organizing against institutions or radically changing the way these established institutions mobilize their constituents will be required.

## Against Rigidity

But rigidity is losing ground in representing the approaches necessary for true change to occur, particularly in the context of grand challenges and wicked problems. More flexibility and fluidity across the action field is required both in understanding movements, as well as in the activities of organizations

to gain meaningful ground in the advancement of their goals. These structures promote de-centralization of the decision-makers and give more opportunities for those within a community to build stronger networks, with less rigid demands on their time, to advance the movement more holistically (Adnan, 2021). One such instance is the acknowledgement of partial organizations (Arhne & Brunsson, 2011) in which the formally established organizing structure may not work for a group of mobilizing constituents, and instead they adopt a few elements of organization to work towards their objectives. This may also mean relying on other organizers and organizations to supplement the work of smaller groups of those partially organized.

Each of these structures is required understanding for social movements to grasp how they fit together and can expand the impact and important role of each. Another layer that can be used to understand each of these containers is the concept of the meeting arena as proposed by Haug (2013). The meeting arena is a place for decision-making and provides context for constituents on what they can expect within a specific meeting event through the established social order. Meeting arenas carry characteristics of organized, networked, and institutionalized structures and allow for the intersection of opportunities that arise from these formats to contribute to and understand the challenges of the social movement. What this layer also supports is moving beyond the formalized structures of how people organize into structures that describe what activities or tactics they select when they do.

Although meeting arenas are typically used to understand a movement from the outside, there is opportunity to use them to map the system of the movement itself and see the connections between the decisions made within networks, institutions, and organizations to contribute to the overall vision. Meeting arenas can be mapped along space and time, but they can also “imagine an emotional map, a map of ideologies, cultures, discourse, or power” (Haug, 2013, p. 712) which provides meaningful context for how constituents can be mobilized and brought into the folds of these arenas.

## **Systems Structures**

At the macro level of organizing comes a more globalized and systems-oriented approach. One such example is the Global Action Network (GANs), which bring together “diverse groups and resources around the world to create the vision of how we can prosper as a common humanity and to actually create the depth and breadth of change that the vision demands. GANS are organisations and networks that join together under a common name to address a particular issue of public concern through a worldwide change strategy” (Waddell, 2003). A more recent contribution is the T-System (Waddock et al., 2022) which is more comprehensive and transcends the standard containers as previously described

to include the partial organizations, meeting arenas, campaigns, and initiatives that are utilized by movements to seek change. The T-System has one imperative, however: transformation is required.

## **Understanding Organizing**

The message from all of these methods is clear: organization is a fundamental component of social movements and systemic change when opportunities present themselves to overcome societal malaise with the status quo (Tilly and Tarrow, 2015). Without containers for action, mobilization and movement advancement is impossible. By understanding each of these sub structures, as well as new units for understanding how groups who are not formally connected or formally organized may still be making decisions towards transformative change, these larger systems for global movements require coalitions to organize their efforts in a cohesive manner and to understand how each actor and their activities fit together.

## Coalition Building in Social Change

For a social movement to progress, the goal must always be to engage new groups of people. One tactic for this, of course, is to try and engage with the general public. But this is not the only method for recruiting new people into the fold. There are established groups of people who are already working to unravel knots of injustice, environmental degradation, and economic inequalities — these are the groups who are more likely to take up the framing of other movements because they are participants in their own.

Systems thinking is about seeing a larger network and how unexpected allies may share similar visions but provide an approach that is not something another organization may have the capacity, resources, or expertise to be able to address themselves. To really change a system, collective impact (Kania & Kramer, 2011) must be a primary goal of organizers and forming collaborative coalitions is a critical piece in addressing wicked problems and grand challenges (Heaney & Rojas, 2014).

### The Role of Backbone Organizations and Systems Leadership

Coalition building is not a natural or automatic process. It takes work and a commitment to relationship building (Kania & Kramer, 2011), typically from a backbone organization (Kania & Kramer, 2011), field catalyst (Hussein et al., 2018), transformation catalyst (Waddock & Waddell, 2021), or support organization (Jacobs, 2016), to understand the system of actors and where there are gaps and opportunities for collaboration and connection to avoid duplication of efforts. These organizations are meant to cross traditional organizational structures to provide insight, resources, and hierarchical structures to support the movement (Hussein et al., 2018). They can also centralize data collection and tell the story of movement performance which is a critical step in collective impact (Kania and Kramer, 2011; Judelsohn et al., 2022).

The emphasis on relationship building is critical as different groups who may have conflicting views can cause significant disruptions in movement progress if they cannot see how their individual and organizational contributions can work to advance the shared future vision (Kriesei, 2007). The backbone organization can help to mitigate these relationships and demonstrate the shared value in a diversity of perspectives and how progress can only be made through commitment to respect each other's contributions in collaboration (Jacobs, 2016; Useem & Goldstone, 2022).

Systems leaders in these backbone organizations are critical to the long-term success of the movement. But there are characteristics that have been identified for the functional leadership of these

organizations to ensure their long-term success. Senge et al. (2015) identify, of course, relationships built on trust and listening but also a confidence that something can and must be done with a willingness to move forward in experimentation; a comfortability with unknowing that leads them to ask simple questions and learn in the open; and the ability to work with those that they may disagree with in order to ensure all perspectives are considered.

Worth noting here as well is that sometimes this strong systems leadership means being comfortable with letting the next organization take its place if it means movement progress through this coalition approach (Useem & Goldstone, 2022). A successful movement is one that is comprised of organizers who are comfortable with seeing a new generation experience the victories that previous generations sought (Heaney & Rojas, 2014).

## **The Power of Hybrid Organizations & Coalition Learning**

Hybrid organizations as proposed by Heaney & Rojas (2014) are likely to not only make better backbone organizations, but they are also the sorts of organizations that are likely to build coalitions and spread the message of a movement more effectively. These are organizations who have adopted and appeal to multiple identities and they may “fulfill a significant brokerage function between movements” (p. 1049) as a result. But this is not their only opportunity for crossing boundaries. The hybrid organization may also be able to straddle lines between hyper-local engagement and activities in a movement at the micro scale, and those that reach into the meso, exo, and macro levels of the movement as well.

With hybrid organizations in a coalition context, there are also unique opportunities for learning to take place, as their activities by their very nature transcend organizational boundaries and spill over into other organizations. For true change to take place, learning is a key component of the system at all levels. Knowledge transfer opportunities must happen across the coalition, within each organization, and at the individual level as well (Jacobs, 2016). Using hybrid organizations to move horizontally across organizations as well as vertically to access and engage with actors at different power levels can help to support the movement’s growth through learning processes and adoption of new activities that have demonstrated success in new partner organizations. This is thinking and acting in systems.

# Identity in Organizing

Organizing and identity make up a reinforcing loop. Organizing is the container by which identities are formed and provide meaning and validation to participants and organizations. These two layers can work together in the growth of a movement and in creating opportunities for transformational change but standing too firmly in one identity or by restricting identities that are allowed to take space within the movement can also limit progress.

## A Case for Identity Politics

Addressing first, the ways in which identity can support a movement's goals primarily occurs through the strategic crafting of identities by an organization or movement (Polletta and Jasper, 2001) in order to develop frame resonance (Benford & Snow, 2000) with current and potential constituents (Heaney & Rojas, 2014). Identity is important to a movement and to its constituent organizations as it supports claims-making processes; it can act as a way to incentivize and recruit new members or retain those already participating; it can lay out strategic direction; and it can contribute to measurement of success (Polletta and Jasper, 2001). By focusing on identity, awareness can be better built within individuals (McAdam et al., 2001), supporting a consciousness raising that may change an individual's identity and provide them the space to exercise this change in order to support further engagement for the movement (Polletta and Jasper, 2001).

Worth noting are not just those that participate in the movement, but those outside of the movement, too, particularly in the potential to recruit new members or mobilizers. Heaney and Rojas (2014) refer to those internal and external to the movement organizations as "audiences" which can include "members, supporters, competitors, volunteers, staff, customers, foundations, government officials, mass media, and the public at large" (p. 1051). These audiences should also include those in opposition to the movement, or those who are seen as the opposition. Without strategically crafting identities that can be accessed by these audiences, there are limitations to movement resonance and growth.

## Plurality and Movement Growth

This strategic crafting, however, can cause barriers. When an identity is deliberately left out, or an identity is given no space to contribute, this can stifle a movement's opportunities for growth and collective frame resonance. Ferraro et al. (2015) highlight the ways in which identity and positionality comprehend a wicked problem and suppose solutions to be undertaken across organizations within a

movement. They refer to this through the lens of pragmatism (p. 369), but systems thinkers and cyberneticists refer to it as requisite variety (Ashby, 1956), which supports the notion that with greater internal complexity of the change movement comes a system that is better able to preserve itself so long as that variety is greater than that of the system it aims to challenge. In social movements, this diversity of perspectives means a better likelihood for progress and achieving the shared vision (Jacobs, 2016) and establishes a requirement for many movement groups and organizations to be active within the ecosystem for transformational change.

Of course, it must be acknowledged that with this gathering of identities, so too come challenges. These challenges are usually in the form of controversies, a term used here in reference to the work of Callon et al (2011) who promote controversies as opportunities to learn and explore. Polarization and the rise of groups deemed as “far-right” or “far-left” are increasingly common and proving more difficult to transcend (Useem & Goldstone, 2022), but there is opportunity to explore and learn from each end of the spectrum (Castelli Gattinara & Pirro, 2019) and transcend the binaries of left and right thinking by looking at controversies differently. Reflecting on hybrid organizations and hybrid forums (Heaney and Rojas, 2014; Callon et al., 2011) as well as meeting arenas (Haug 2013), there is need for spaces in which those with differing value systems or identities can still come together safely and securely, even when this is seen in opposition to a movement’s stated values (Ferraro et al., 2015). The participants in these spaces can use controversy in developing avenues for tugging at the deeply entrenched knots of a system. It is not so much about overcoming difference and getting everyone to agree on the same approach, or to removing identity as a barrier, but in seeing how plurality of identity and perspective as an opportunity to collaborate can produce the desired change the benefits a greater public than what is currently available in the current political system (Adnan, 2021).

For social movements, requisite variety in identity, and getting comfortable with meeting arenas that support this plurality, are critical to long-term success. Although there are identities that espouse a range of beliefs that should not be included in building a better world, most people would typically find themselves in a range of flexibility. However, with expanded space for plurality of identity and perspective will require ways to move through conflict for continued success.

# **Conflict Transformation for Social Change**

Conflict is a consistent theme in social movements. Without conflict, there is no movement. But when most people think of conflict, they likely point to a moment of contention between an elite position, such as a government or institution, and their dissenting counterparts that form a social movement. However, an area where special focus is deserved is when conflict arises within social movements and between organizations themselves. This might occur when one organization's solution to an issue is perceived or is in actual opposition to the wellbeing or the solution of another group. These moments asset why conflict transformation as a tool is so critical to ensure that movements are able to move forward together if they choose to take up the challenge of transformative systems change.

## **Conflict Transformation vs. Problem Solving**

Conflict transformation, described by John Lederach (2003) is engagement in change efforts that extend beyond specific problems and use a series of lenses within relationship to each other that allows for both looking at what the conflict is, and seeing the deep rooted causes and effects of those conflicts, in order to suggest pathways forward together. And it is important to make this distinction between conflict transformation and problem solving. Where problem solving is suggesting often reactive and symptomatic “band-aid” solutions, conflict transformation brings together a diversity of identities to recognize the ways in which the structures currently in play can impart harm on each group, causing conflict, while giving space to imagine the ways they can build a future that improves their lives through mutual understanding (Adnan, 2021; Rodriguez & Inturias, 2017). This process also gives space for each interpretation to co-exist and for the group to arrive at opportunities for intervention without requiring explicit agreement on one avenue for achieving this vision, an important piece of tackling grand challenges and wicked problems (Ferraro et al., 2015).

## **Building Conflict Transformation Capacity in Organizations**

But conflict transformation can feel challenging, particularly when that conflict may feel rooted deeply in identity that is reinforced by long-held perceptions of each group. In order to set the stage for conflict transformation to take place and lay a strong foundation for co-design, Midgley's (2017) Moving Beyond Value Conflicts model can serve social movement organizations well as a tool. This model is presented as a Problem Structuring Method (PSM), and provides a method in which two or more organizations can engage in conversation that can lead to conflict transformation rather than simply



trying to solve the problem from their individual points of view.

This framework presents three key components that act as areas for interventions for conflict transformation: broadening boundaries, understanding values, and transcending stereotypes. Each area of intervention can be served best for transformational change by what Scharmer et al. (2021) refer to as “generative listening” and “generative dialogue” (p.10) from their Theory-U Matrix of Social Evolution. Believing that learning can take place actively and constructively to move beyond value judgements, stereotyping, and the perceived boundaries of one another and rise to the challenges at hand is critical in social movement organizing and the foundations lie in believing that conflict can be transformative rather than a barrier to success.

# Storytelling in Social Change

Storytelling in social change organizations is a recruitment and retention tactic that can capture new audiences and continue to resonate with the identities and needs of those already in their ranks. But it can also act as a bridge between the current reality of a system and the future system that is desired by the mobilized. However, these bridges can be burned, so understanding how a story can contribute to a movement — or hinder its efforts — is an important area of exploration for social movement organizations and organizers.

## The Benefits of Storytelling

At the surface, there is a clear and practical benefit to storytelling: it helps to explain the success and failings of a movement in a way that preserves participation. Social movement organizations can measure the impact of organizations and coalitions by the stories they tell. It is not always enough to prove success with quantitative measurements, but to also weave these together with qualitative stories that can continue to inspire those mobilized while also shoring up additional human and financial resources (Judelsohn et al., 2022). For organizations who experience moments of campaign failure, stories can help to craft the reasons why this failure occurred and the ways that action will be taken for success in the future, too (Beckwith, 2015). These functions can help to control the narrative in a context where the institutional media may ignore, under-inform, or attempt to twist the message the movement needs to maintain to gain support.

But there are benefits that can be harder to define, although just as important in maintaining momentum and participant engagement. Storytelling in the context of social change movements is a function that turns the ambiguous more accessible as the emotional resonance of a good story can support individual and group identity formation (Polletta, 2006) and contribute not just to the defining of political goals, but to the formation of the requisite cultural identity that can inspire change (Polletta & Jasper, 2001). Culture is critical to organizational understanding and helps to shape the deeply held assumptions of those within a movement.

## Frame vs. Story

It is worth understanding the difference between framing and storytelling. Plenty of work has gone into how stories can mobilize participants and contribute to frame resonance. Having already touched on framing activities, it is important to note that these functions of organizational recruitment are connected but not the same. Stories and narratives have beginnings, middles, and ends while a frame is

much more difficult to identify in such linear concepts — and it is much easier to know when one is telling a story (Polletta, 2006). Storytelling is aligned more with frame articulation as a process that connects events together in a way that feels compelling and true (Benford & Snow, 2000). This truth requirement is subjective, but this is how stories function within frames — they must resonate with deeply held cultural myths or otherwise be rejected (Adnan, 2021).

## **Cautionary Tales**

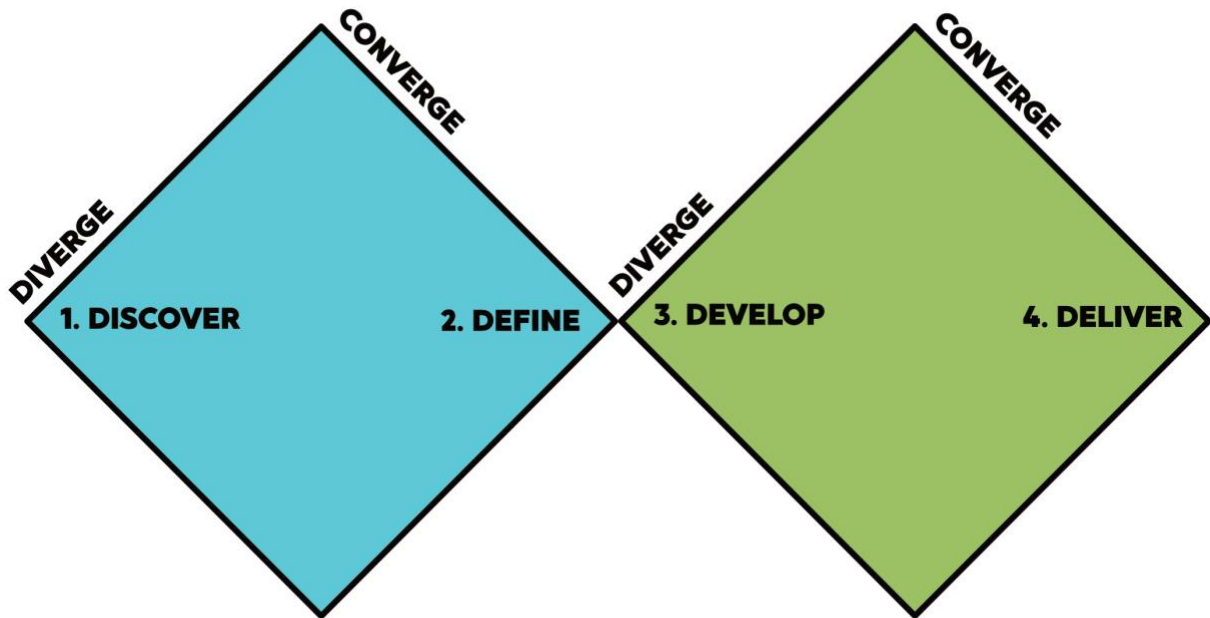
Worth noting are the barriers that can arise when a movement focuses too specifically on one type of story or on a story that fails to root itself in strongly held cultural myths and societal paradigms. For example, Ferraro et al. (2015) suggest that in the context of robust action, continuing to focus on facts around sustainability in order to convince audiences of a cause, may not be the best approach (p.380). This sentiment was also echoed in a column in the New York Times, where the call to have fewer children to mitigate climate impact was challenged. This is not to say that this would not work or is not true, but rejection is likely due to the very real fact that “if the cost of caring about climate is to forgo having a family, that cost will be too high” (Klein, 2022 June 5). The call to not have children as a story for climate change movements is so radically different from what is a deeply held cultural – and arguably biological – desire to have a family, and thus is unlikely to ever change minds and draw supporters in.

Another challenge with identifying the story that a movement or an organization tells lies in any approach that gets too visionary and loses touch with the current reality. Painting an image of a future that relies on novelty and newness rather than finding ways to respect people’s needs and desires and carry them to this future state can be damaging to the mobilizing potential, even if it feels exciting to imagine new worlds that are radically different (Adnan, 2021). Stories have to bridge comfortably between what is and what can be, and make space for participants to see themselves walking between those two worlds.

Organizations and social movements at large must find ways to show current and potential constituents that their participation can result in a positive, welcoming future — not one of austerity and sacrifice — while not being so unrealistic that the stated vision feels impossible or self-sacrificing and thus not worth working towards.

## Methods

# Research & Design Process: The Double Diamond



*Figure 2 Double Diamond Research Process*

The Double Diamond framework for innovation, proposed by the Design Council in 2004 and refined in 2019, involves four stages of research and development to produce innovative solutions to complex questions. The divergent phases involve approaching a problem “widely and deeply” (Design Council, 2019) while the convergent phases support “focused action.”

## Background Literature Review

Taking part across the discover, define, and develop phases, a literature review of design concepts, systems thinking, and social movement organizing was undertaken. During the discover and define phases of this project, case study mapping and expert consultations were conducted.

## Case Study Mapping

In tandem with the literature review and expert consultations, and through the discover and design phase, case studies for social movement activities were developed that represented networked, institutional, and organized structures. These case studies include Gilets Jaunes, Canadian Union of

Public Employees (CUPE), and Extinction Rebellion. These movement case studies involved two sources of information: what others said or say about the organizations and the movement as well as what those organizations say about themselves. The information under review was organized using a series of mapping activities, some of which are commonly used in systems design, to produce recommendations within the develop phase.

### *Rich Context Map*

The use of the rich context map provides a space for analysis of long-term trends apparent in the system, the ways in which the system currently preserves itself, and the emerging niche innovations that the system is adapting to address changing trends (Jones & Van Ael, 2022). For social movements, the rich context map is used to understand how organizations are adapting to trends and standardizing operational elements to develop new tactics and new approaches to organizing.

### *Actors Map*

The actors map is used to understand the players within a system or movement and the relationship to one another (Jones & Van Ael, 2022). The actors map uses four levels of analysis along two axes denoting knowledge and power within the movement to demonstrate the relationship of each actor or stakeholder to one another. Their relationships can be allied, in conflict, or oscillate with changes in the movement or in tactical approaches causing fluctuations in the perceptions of one another.

### *Johari Window*

This technique for mapping is not as commonly used in systems thinking or design but is useful in understanding the motivations of an individual within an organization and why they might take up a movement's cause. This helps to analyze how identity impacts movements and explorations into what is known to all parties, what is known to the individual but not to others, what is not known to the individual but is known to others, and what is hidden from all actors. This helps to identify ways in which organizations can support new knowledge sharing practices to bring more of the unknowns into the knowns and give space for a plurality of identities to engage in the movement (Oliver, & Duncan, 2019).

### *Ecosystem Governance Model*

The ecosystem governance model takes actors as well as rich context mapping findings to identify

how a movement is governed through organizational relationships and to identify missing connections that could support far-ranging influence (Jones & Van Ael, 2022). The ecosystem governance model helps to understand where resource and collaboration gaps exist and can be filled to scale up isolated and symptomatic approaches to change and provide space for transformational approaches across a larger network of organizations and system actors.

## **Expert Consultations**

The expert profile was selected, rather than a “boots-on-the-ground” organizer, as systems logic and systems thinking at this point in movement making is still largely within the realm of academia. To analyze some of the tactical choices made in the case studies through this lens requires the expertise and insight of those who study systems thinking and how to apply it in practice and evaluate against.

Experts were also selected based on their involvement in change organizations with an approach that actively uses systems logic in their work. Their work extends beyond just one movement and demonstrates characteristics of a hybrid organization that supports coalition formation.

Information provided was coded and organized under key themes focusing on the guiding vision of an organization or movement; their theories of how the activities undertaken produce change; the tactics and strategies used; as well as how storytelling, identity, and narrative formation contribute to the movement in ways that support or hinder systems change. The resulting content was compared and considered against the information gathered through the background literature review and the case studies to support the development of the proposed framework.

## **Synthesis Mapping**

During the development phase of this project, two mapping tools were used to synthesize the information gathered during the case study and consultations with systems change makers to glean foundational insight for the framework produced.

### *Causal Loops*

Causal loops are used to indicate where archetypal patterns of activities within social movements exist that perpetuate the status quo and produce recommendations for interventions at a systems level rather than at a symptomatic level.

### *McLuhan’s Tetrad*

In the development phase, Marshall McLuhan’s tetrad was used to better understand common

tactics and organizing activities within movements. If the medium is the message (McLuhan, 1964), the tactics and organizing styles of a social movement help to relay the message of what their aim is and how they hope to achieve it. McLuhan believed that four questions can be asked to understand how any medium has impact (Levinson, 1999) which are included in his tetrad. These were used to analyze organizing tactics to better understand what happens when an activity is selected to enhance the work done by an organization, what may happen if that medium is pushed to its limits, what it may call up or retrieve from social movements past, and what it may push into obsolescence.

The delivery phase is met with the production and submission of the final framework, presented in the Synthesis section of this report, which compiles the learnings and recommendations collected within each phase.



# Movement Analysis

## Approach

The case studies that follow use media sources and the content produced by movement organizers to understand how these social change movements formed, what tactics they used, how they may have ended or altered, and whether a systemic approach was taken to promote transformational change. They were selected based on their organizational approach, with the Gilets Jaunes being strictly networked, Extinction Rebellion having characteristics more traditionally associated as “organized”, while the CUPE Strike in Ontario was selected because of the institutionalized nature of the labour movement.

The mapping tools used in each of the case studies are described in the Methods section and provided in detail in Appendix B.

# Gilets Jaunes (Yellow Vests)

## About the Movement

In November 2018, protestors clad in reflective yellow vests took to the streets of France to protest an announced fuel tax that was to be implemented by the federal government under Emmanuel Macron. The government's outlined intention was in support of the agreements made during the Paris Climate Accords to reduce carbon emissions.

The protests began on November 17, 2018 and persisted each weekend for several weeks, occupying significant space in public areas with estimates of mobilized participants ranging in the millions nation-wide. The movement was dubbed *Gilets Jaunes*, French for yellow vests, as a nod to the government-mandated safety vest that all drivers are required to keep in their cars in case of an emergency. The vests were worn by protesters as an act of solidarity. Despite significant interruptions in the daily lives of France's people as a result of the protests and the mostly negative narratives surrounding the protests in the media globally, (Shultziner and Kornblit, 2020), the Gilets Jaunes initially saw support from 75 percent of the French public (Fassin & Defossez, 2019).

The Gilets Jaunes fascinated the news media and scholars of movements alike as a unified force despite very little participation in traditional protests or political activity previous to the 2019 demonstrations; no significant affiliation with labour organizations or political parties; and an adamant adherence to a decentralized organizing practice that saw no formal leadership structure form (Fassin & Defossez, 2019; Al Jazeera, 2018; Shultziner and Kornblit, 2020).

## Diving Deeper

Although the protests erupted in response to the fuel tax, the policy was a lit match next to a powder keg of symptomatic issues. Participants of the Gilets Jaunes were largely low and middle income earners who had seen their quality of life decline since the 1980s (Fassin & Defossez, 2019). Rising housing and fuel costs, coupled with a reduction in public services pushed much of the working class to the economic, geographic, and societal fringes (Fassin & Defossez, 2019). The movement was also marked by a distaste for the ruling class whose lives remained unaffected while those who felt represented by the Gilets Jaunes saw new policies as the lower class paying for this luxury of uninterrupted wealth and privilege (Behar-Garcia, 2020). For these reasons, as well as the diffused organizing tactics that saw no leader emerge, the movement is largely seen as ideologically populist, with the general public opposing a ruling class.

After some confusion from the news media on what it was the Gilets Jaunes were campaigning for (Meichler, 2019; Al Jazeera, 2018; Shultziner and Kornblit, 2020), a list of 25 demands was released to unite the movement and were addressed as such:

“MPs from France, we inform you of the People’s Directives for you to transpose them into law.”  
(France Bleu, 2018)

These demands ranged from addressing homelessness and economic access to immigration reform. Each of these demands can largely be described as symptomatic solutions to systemic problems and thus an orientation to systemic logic in the organizing of the Gilets Jaunes is not definitively present. Worth noting under the demands that address immigration, some systemic thinking is present:

“18. That the causes of forced migration be addressed.

19. That asylum seekers are treated well. We owe them housing, security, food and education for minors. Work with the UN to have reception camps open in many countries around the world, pending the outcome of the asylum application.” (Meichler, 2019, Google Translate from original French)

However, these demands quickly turned to removing unapproved asylum seekers from France and returning them to their land of origin as well as the assimilation into French culture for anyone approved to remain in France.

With their demands published and the demonstrations ongoing into December, the French prime minister, Édouard Philippe announced that the tax, along with increases to basic utilities, would be suspended (Al Jazeera, 2018). With the announcement of the initial instigating policy rolled back, the Gilets Jaunes’ lost much of their momentum for further organizing and the protests largely petered out over the remainder of 2018.

## **The Impact**

In terms of lasting impact, although the Gilets Jaunes demonstrations appeared short lived, other mass mobilization movements such as Extinction Rebellion have noted that the Gilets Jaunes demonstrated that large-scale protests are still possible and can capture the attention of the media and the public to create change (Mackintosh, 2019). There are also very recent revivals of the Gilets Jaunes in France, with pension reforms being pushed through in French government in the Spring of 2023 —

and the reflective vests making an appearance once again (Reuters, 2023; Knight, 2023).

In other areas, the symbol of the yellow vest was carried into spin-off movements and seen most notably arising in Canada as a precursor to the Freedom Truck Convoy with prominent organizers Pat King and Tamara Lich notable in both movements (Issawi, 2019; Broderick, 2022). The Canadian Yellow Vests did indicate that they aim to protest the federal and provincial carbon tax much in the same way as the Gilets Jaunes, but they were notably more xenophobic in their rhetoric and called for the end of government “tyranny” while denouncing mainstream media with messaging across their organizing platforms, often seen as violent in nature (Crosbie, 2019; Rieger, 2018; Mosleh, 2019; The Canadian Press, 2019). Where the occupation of public space was used as a shared tactic between the Gilets Jaunes and later movements like the Freedom Truck Convoy, public support was not the same.

## **Understanding the Organizing**

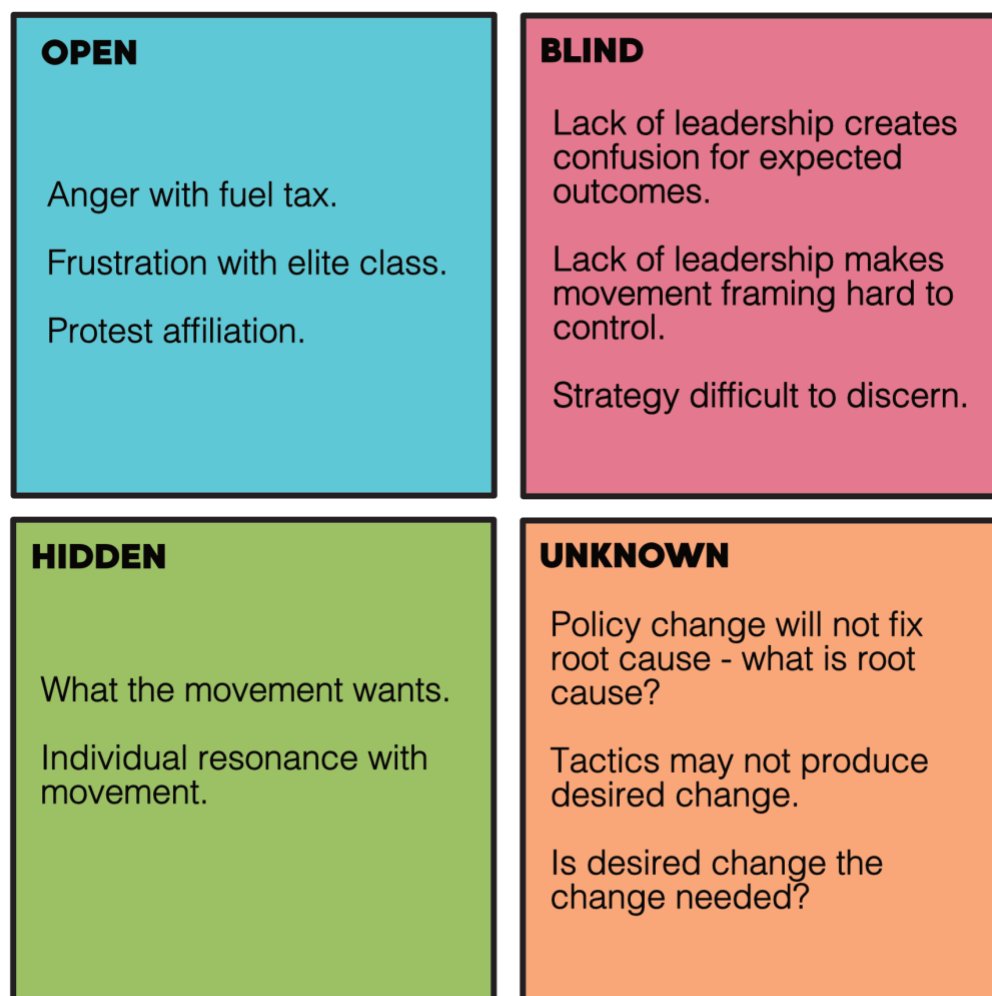
### *The Context*

As has been stated previously, participants in the Gilets Jaunes demonstrations had a lit match in a fuel tax on working class citizens but a growing source for an explosive reaction in established long-term trends. These trends included the “pauperization” (Fassin & Defossez, 2019) of the working class through rising costs and diminishing public services; policies that address the symptoms (ie; a fuel tax to reduce CO2) rather than the system (ie; capitalist growth that pumps out the CO2); a growing resentment to the status quo of the ruling class while simultaneously expecting that the status quo of the golden era of production remains the same; and a trend of occupation of public space to assert dissatisfaction with this status quo as had been seen with the Occupy Wallstreet movement in the wake of the 2008 financial crisis.

Of note in the makeup in the Gilets Jaunes movement are the cultural norms and values that were highlighted. With no established political affiliation, and in-fact an insistent a-political nature often described in the coverage of the protests, there was solidarity seen in the lower and middle classes across France. This solidarity through the visual imagery could be seen in the wearing of the yellow vests, but there was a noted diversity in expectations from the movement (Al Jazeera, 2018) which made it difficult to further organize once the primary goal of removing the fuel tax was achieved. This was likely a result of the decentralized network of participants that made communication and unification through narrative and identity difficult outside of symptomatic fixes. This decentralized nature also likely contributed to the ease in which outside organizations could pick up the same imagery and organizing tactics and build a movement in new directions.

Emerging trends that arose from the Gilets Jaunes in the way the movement was organized included a visual signifier of solidarity and purpose in the use of the yellow vests; consistent weekend protests that supported the identities of those participating (ie; the working class who could not afford to stop working during the week); and the decentralized nature of organizing that allowed people across geographies, ages, and socio-economic factors to not only protest, but to make the overarching themes of the movement specific to their identities and build support through this localized approach.

### *The Participant*



*Figure 3 Johari Window for the Gilets Jaunes.*

The participant of the Gilets Jaunes movement, as has been previously indicated, was members of the working class - typically those of lower and middle income who had been pushed to the fringes of

society and were feeling disillusioned with the activities of the government and their primary interest groups. When the protesters took the street, their participation and affiliation with the movement was in the open and this frustration with the elite class and their dissatisfaction with policies that failed to hold this class accountable were well-documented and understood.

What was hidden in the early days of the movement were the specific demands and objectives of the protestors, outside of the removal of the fuel tax itself. When looking at large-scale demonstrations and the contentious politics that surround them, it may also be unclear to the general public what an individual's call to action may be outside of the defined identity of the movement as is painted through statements made by organizers and how the media portrays them. However, this is an important aspect to understand for empathy to build and for those who come from similar perspectives to take up the gauntlet and join as well.

Where the blind spots come in for the individual protestor and for the Gilets Jaunes are a lack of leadership or defined organizing structure which made it difficult to take the movement seriously or see long-term opportunities for the demonstrations to have an impact. Without an understanding of the long-term strategy, it can be difficult to recruit new participants and sustain the movement. A lack of leadership may also mean that when other groups take up similar identities or symbolism, it will be difficult to control a narrative that may not align with the original intentions of the movement, as was seen with the Canadian version of the Yellow Vests.

And ultimately, what is unknown to the individual participant of the Gilets Jaunes is whether removing the policy will address their concerns and if any change produced the right change. It is also hard to know if the change in policy will produce undesired outcomes.

### *The System Actors*

The actors that appear in the network of the Gilets Jaunes include the protestors who mobilize to show solidarity for the movement as well as the community organizers who, although loose in formalized organizing structure, set the schedule for the demonstrations. In opposition to this group are the ruling class or the corporate elite who largely benefit from the imposed policies allied with the federal government who crafts and enforces the policies.

In most social movements, the general public also exists as an actor who can provide power to the protestors as positive public sentiment builds an environment to amass further support. The protestors and community organizers have power and knowledge of their purpose, although this may vary dependent on class consciousness as well as how closely the stated aims of the Gilets Jaunes align with

the individual participant or smaller and more localized demonstrations.

The oscillating actor who can be allied and in conflict with both the protestors and the ruling class is the news media who has the power and knowledge to influence at the societal. They are the predominant narrative builder for the Gilets Jaunes, communicating to the general public. It was highlighted throughout many reflections on the Gilets Jaunes that the media often painted them in a negative and violent light but also did amplify their cause and provided a means for regular access to the happenings within and as a result of the movement.

### *The Organizing Ecosystem*

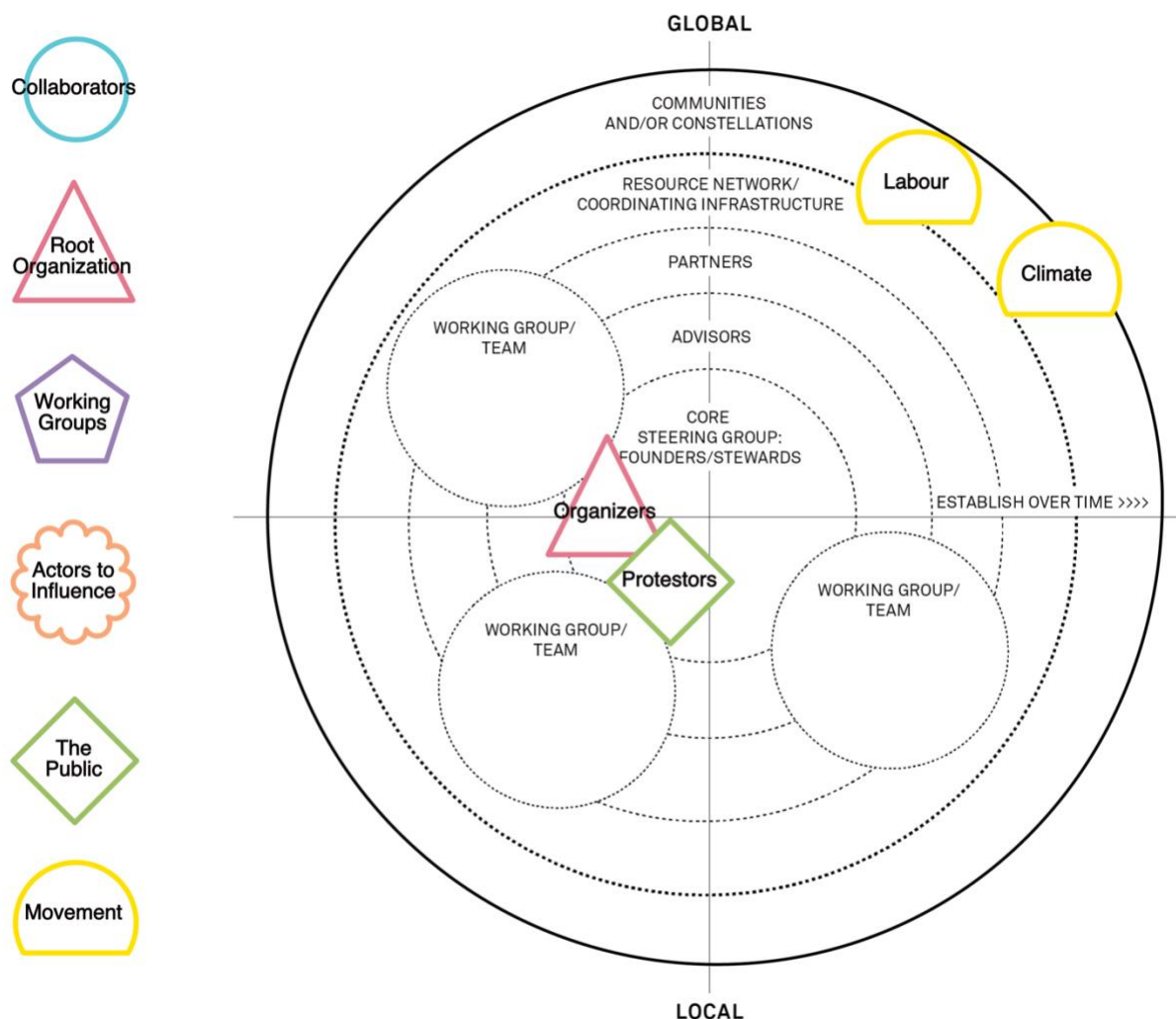


Figure 4 Ecosystem Governance Model for Gilets Jaunes.

The organizing ecosystem for the Gilets Jaunes is an interesting one as very few layers are incorporated into the activities of the group. At the level of core steering groups or stewards of the



movement, there existed the community organizers and the protesters, both locally-oriented and whose positions, as the core of the human resource within the movement, were established early.

Due to their decentralized approach and an overt refusal to define leadership or a long-term strategy of the movement, at the levels of advisors, partners and a resource network of coordinating infrastructure, there are no actors of note. At the highest level of the ecosystem, the labour movement or the climate movement could have provided support and strong foundations for their list of demands, but due to the limited nature of their organizing tactics, this level of systems thinking was not present within the movement and bridges were not built.

## **Summary**

The original Gilets Jaunes were a short-lived movement in France whose limited tactics of protest captured significant media attention but who lacked a process for sustaining and advocating for transformational change with their constituents and the public at large. They were reactionary in their cause and networked in their organizing practice which made transformational and systemic change difficult in the long-term. However, they took on an approach to inclusion that gave space to a multitude of identities, so long as a working-class solidarity against an elite class was maintained. This was likely a benefit for their ability to amass large numbers quickly and was seen in later movements, particularly the climate movement.

# CUPE Education Workers Protest (2022)

## About the Movement

In November 2022, the Canadian Union of Public Employees (CUPE) that represents support staff in the education sector announced a protest action against the Ontario Government's 'Keeping Students in Class Act' (Passafiume, 2022; Alberga, 2022; Adlakha, 2022; CBC News 2022 November 11) after failing to bargain in good faith during contract negotiations. The 'Keeping Students in Class Act' used Article 33 of the Charter of Rights and Freedoms, known as the Notwithstanding Clause, to suspend additional rights that would make striking illegal and would impose a four year contract on CUPE workers (Passafiume, 2022). In statements made from both CUPE and the Canadian Civil Liberties Association, there was consensus in the use of the Notwithstanding Clause as an illegal move by Ontario's Progressive Conservative Party (Adlakha, 2022; CUPE Says Bill 28, 2022) and was not in line with what the Notwithstanding Clause was meant to be used for (Jones, A., 31 October 2022).

Despite claims from the Education Minister of Ontario, Stephen Lecce, that this would negatively harm students who had already faced a rollercoaster of access to classrooms over the course of the COVID-19 pandemic, there was immense public support (Mastracci, 2022) as well as support from unions across Canada (Mastracci, 2022; King, 4 November, 2022; "We won," 7 November, 2022).

With the pressure mounting after a Friday protest led to rumblings of additional union groups ready to walk off the job to support CUPE workers (Jones, A., 3 November, 2022; Mastracci, 2022), a deal was reached the following Monday when the Premier Doug Ford agreed, in writing, to take the legislation off the table if CUPE called off the strike action (Alberga, 2022; CBC News, 7 November 2022; King, 4 November, 2022). At the 10am press conference where a general strike action was alleged to be announced, instead, CUPE President Mark Hancock and Ontario School Board Council of Unions (OSBCU) ordered the education workers to end the strike so that bargaining could resume.

## Diving Deeper

Although contract negotiations and collective bargaining are regular processes in the lifecycle of unions across the globe, there was something different about this moment in labour that is worth analyzing. The outpouring of support from the public and most notably, from unions across the country, meant that a general strike in Ontario was momentarily possible. The conditions for this were not just formed in reaction to Bill 28, but included the frustration of the working class around increasing costs of living while wages remained stagnant coupled with a level of stress and burnout that had compounded

for education workers over the course of the COVID-19 pandemic (Abdul Malik via Mastracci, 2022). A perfect storm had brewed for mass action to advance the labour movement in ways that have not been seen in decades. Instead, union leaders backed down.

In terms of systems thinking, aside from a brief glimmer of a working-class labour movement united against a singular bill, organizing tactics did not appear poised to produce radical change. For some, this comes from the inherent nature of the union bargaining process being constructed by the economic and governing system as an avenue for claims making for workers that ultimately preserves the system's function (K. Jones, 8 November 2022). This process is perceived by some as an avenue where both sides would eventually be able to declare victory by meeting in the middle while upholding "business as usual" (Abdul Malik via Mastracci, 2022) rather than creating meaningful and transformative change through a mobilized and knowledgeable membership.

## **The Impact**

The power inherent in unionization and labour organizing had a short revival in main-stream headlines in 2022 (Subramaniam, 2022; Abdul Malik via Mastracci, 2022), but a stronger unionization trend is not anticipated through 2023.

## **Understanding the Organizing**

### *The Context*

The trends related to the labour movement appear dire. There is an overall decline in unionization across Canada (Statistics Canada, 2022) and an increase in anti-union and anti-strike legislation occurring globally (Crerar & Stacey, 2023). This, coupled with rising living costs and stagnating wages for the working class is leading to a time where labour could make gains, but will struggle with the barriers associated with their regular means and tactics for organizing.

In the current culture and practices of labour organizing, there is a reliance on process that has been dictated by the governing class. This results in a reliance on the institution of a union, who moves through the bargaining process, with defined periods of strike action, rather than building transformational capacity through grassroots organizing. This upholds the status quo and allows for a collective agreement to be reached, but also gave rise to the 'Keeping Students in Class Act' itself. By operating within the confines of a defined and bureaucratic process, innovation is difficult.

What is interesting about the CUPE strike in 2022, is that the majority of the workers represented by the union were women (Passafiume, 2022), in line with the general trends seen across Canadian unions

(Statistics Canada, 2022). This means that there are significant economic repercussions on the individual who takes strike action, but also, if a general strike was pursued, could have massive ramifications on the economic structures of the province as childcare is often a priority concern for women, as we saw during the work interruptions that occurred over the COVID-19 pandemic (Thornton, 2020).

Although opportunities for innovation were not taken in the CUPE strike, glimmers of what could be may offer areas for consideration in the work of other movements including shoring up support across unionized workforces by providing educational resources to meet members where they are. In the next overreach of government legislation, unions and the labour movement could capitalize on this example of potential for a general strike to action such a process.

### *The Participant*

The participant of a union is easy to define from other movements as a formal membership process is inherent trait of the labour movement. Their open qualities include this membership as well as their mandatory role in any protest or strike action taken up at the direction of their union leads.

What is often hidden, unless used in media narratives to define the parameters of the bargaining process and the interests of both sides in the agreement as was seen in the CUPE strike, is the financial needs and impacts that strike action means for members. This is connected to the capacity of an individual member for taking a strike or protest action and their willingness to support concessions where concessions may not be in their best interest. What may also be hidden at the individual level is the individual identities and political affiliations that likely impact their willingness to participate in real transformational change through labour organizing.

What is blind to the member of the union, often, is the public's feelings towards a strike action. In the case of CUPE and the overreach of the Ontario government, there was a strong public sympathy and support spread across unions of varying trade affiliations. Another blindness comes from the potential to build stronger solidarity in workers from a grassroots approach in labour spaces, rather than adhering to top-down recommendations from union leadership.

Of course, there are also significant unknowns at the lack of bargaining table. This includes what the impacts could have been if a longer strike action occurred and if it grew into a general labour strike across the province. There is also an unknown in the negotiations process and what took place prior to the announcement to call off the protest and strike action. In written dialogue between Abdul Malik and Adam Kind through Mastracci (2022) Passage article entitled "Should CUPE Have Kept Education Workers on Strike," Kind also pointed out that if the strike action remained in effect, it is possible that

the Notwithstanding Clause could have been used successfully and Bill 28, the “Keeping Students in Class Act” could have remained in force.

### *The System Actors*

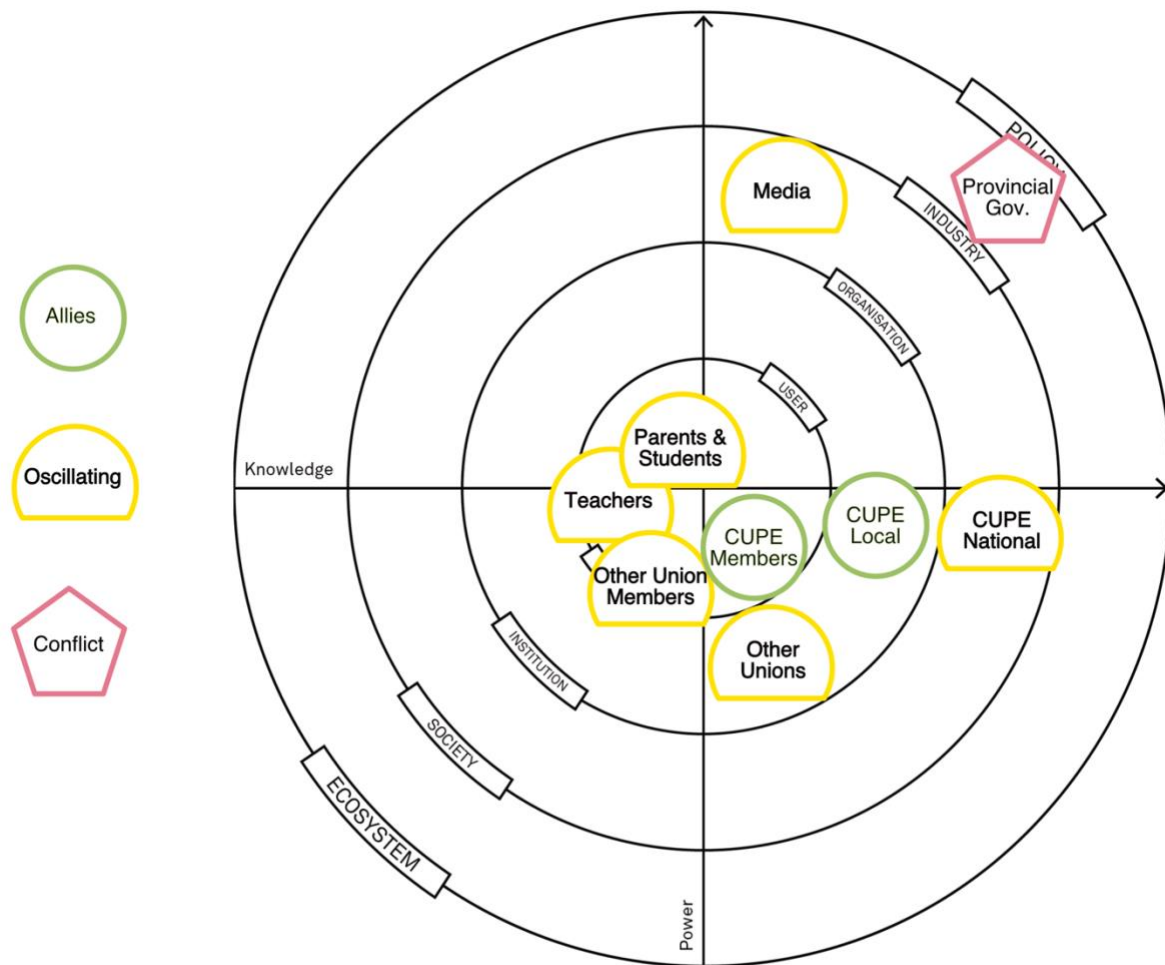


Figure 5: Systems Actors Map for CUPE

Actors in the CUPE system are often in oscillating alignment with one another. This arises at multiple levels. At the level of the citizen, there exists the CUPE member, teachers (who are part of their own union in Ontario), other union members who may be able to organize locally at picket lines and otherwise, as well as the students and parents who are part of the school system who likely had views on the strike across the spectrum. The latter three groups are in oscillating alignment as there is likely a range of factors that can influence either the outward support or participation in the strike action. For

teachers and other unions, they may not have been advised to walk off the job through their own organizations but in some instances were encouraged to join picket lines after hours (CBC News, 3 November, 2022). Whether or not they did so or intended to do so was not highlighted in the coverage of the strike action.

At the organizational level, there is the CUPE local itself and other union locals. The CUPE local is meant to be in alignment with the CUPE member and coordinates with CUPE national. They may also support coordinating strike action with other unions in the area. Although they have plenty of knowledge, they lack in power to influence significant changes in the bargaining process.

At the industry level, we see both CUPE National, who is the bargaining arm of the union and who holds significant knowledge and power in the bargaining process. They are often the ones in communication with the media or releasing statements to the media, who may or may not uplift the narrative that the union is trying to get across.

At the level of policy, and in a position of conflict, is the provincial government whose unwillingness to reach a fair deal and imposed unconstitutional policy resulted in the strike action.

### *The Organizing Ecosystem*

The CUPE organizing ecosystem is an interesting one. At the level of the core steering groups are the CUPE locals and their membership as well as parents and students. These should be the stewards of the movement.

The level that is currently missing is at the advisor level. This is the level that can unite members through education and capacity building with grassroots organizing and an emphasis on shoring up solidarity across trade unions. Without this level, robust strike action and gains for union members will be difficult to come by.

At the partners level are other unions and their membership who may build support at picket lines and in community care during strike actions. With the CUPE strike, we saw this kind of solidarity form quickly and with a strength rarely seen in the contemporary labour movement. Teachers are emphasized here on their own as a natural unionized partner to the education workers.

At the level of resource network and coordinating infrastructure is CUPE national who is the

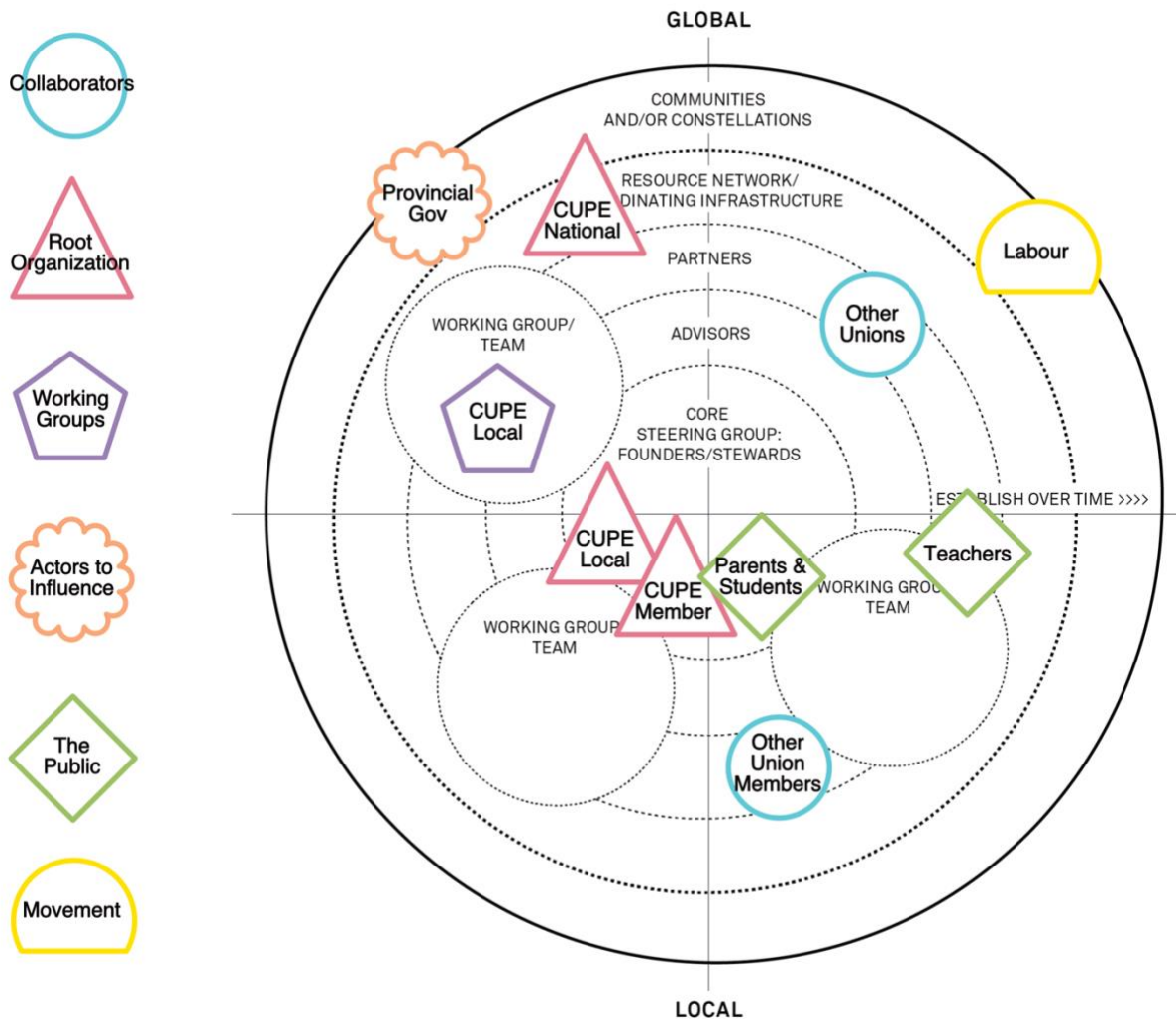


Figure 6: Ecosystem Governance Model for Ontario CUPE Education Workers.

bargaining power on behalf of all CUPE workers. They are the ones making statements on behalf of the workers through their press channels and communicating directly with the media and the provincial government to spread their narratives.

At the level of communities and constellations at the global level is the provincial government, who is bargained with and who is an actor that CUPE must influence successfully to achieve their means. CUPE also operates within the larger framework of the labour movement, and in this case, successfully engaged across trade lines to establish support for their cause. This is likely a result of the Notwithstanding Clause being used and the potential for having long-term impacts across the movement.

## Summary

The CUPE strike for Ontario education support workers in November 2022 had noticeable momentum that could have been built up and propelled a general strike to advocate not just against an unfair and illegal policy, but to establish stronger worker protections, a living wage, and a re-invigorated solidarity movement for the working class. Instead, due to a lack of on-the-ground organizing and the desire of union bureaucracy to maintain the status quo, the strike action was called off and the hopes of a general strike seem to have faded.

The CUPE union, and their union partners, failed to think systemically or with transformation as a goal.



# Extinction Rebellion

## About the Movement

Extinction Rebellion, known colloquially as XR, started in 2018 as a non-violent protest movement with an aim to force immediate action through policy change to address the climate emergency ('What is Extinction Rebellion', 2019). Their first act was a public Declaration of Rebellion outside the House of Parliament in the UK that drew 1000 people. A follow up action that called for protesters to block five bridges across London drew thousands more (Taylor, 2020).

They are a deliberately decentralized organization with a range of tactics that have shifted over time as new knowledge has been absorbed into the organization. The tactics used are often disruptive in nature and have included gluing protestors to buildings or infrastructure, occupying public and private space in large numbers (ITV News, 2023), encouraging mass arrests to overwhelm the justice system (Mackintosh, 2019), and throwing black paint at events as a metaphor for the destructive nature of oil and other fossil fuels (DeWolfe, 2023). The occupation of public space is what won them their support in 2019, particularly in young people ('What is Extinction Rebellion', 2019), and as a recognized household name.

Within weeks of their first two-week occupation of London, the UK parliament checked the first XR demand off the list: they told the truth and admitted a climate emergency (Nugent, 2020). Although not a full commitment to their second demand, which is the reduction of carbon emissions to net zero by 2025 ('What is Extinction Rebellion', 2019), the UK parliament also passed a legally binding target of net zero emissions by 2050 (Nugent, 2020). The groundswell of support was largely maintained, until October 17, 2019 when a group of XR-affiliated protestors swarmed a train in a working class metro station. The train, failing to leave on time, inspired anger in the passengers and violence broke out (Nugent, 2020). With a sudden shift in support from would-be allies and the public, XR had to re-evaluate their tactics and organizational setup.

This resulted in a new strategy for 2020, led by Extinction Rebellion Global, that was ultimately put on hold when the COVID-19 pandemic broke out and in-person demonstrations were called off. Simultaneous crises like war, racial justice and the disenchantment with the status quo of governing left would-be participants additionally weary (Boyle, 2023). Although their work persisted over the course of the pandemic, loosely affiliated organizations with XR who have demonstrated increasingly risky tactics including Just Stop Oil's soup splashing of van Gogh's Sunflowers, have also inspired change within the

UK government to crack down on some of the protest styles that XR has become known for. Coupled with declining public support, XR announced on December 31, 2022 that they would out a pause on their more disruptive tactics in favour of shoring up more public support and building capacity in localized community groups (Extinction Rebellion UK, 2022) while maintaining their work to target the perpetrators of the climate crisis (Boyle, 2023).

## **Diving Deeper**

Several aspects of Extinction Rebellion have given rise to unique lessons to be learned from their efforts. XR operates not just with a key set of demands, but also with a list of values. By having these separated, there are concrete goals that XR strives toward while their list of values sets up their guiding principles. This gives space for their decentralized network of XR affiliated groups — including geographical locations like XR NYC, age demographics like XR Youth, and professional groups like XR Science — to define their tactics independently and in ways that remain true to the group’s identity to bring about “system change” (What is XR, 2023).

This room for experimentation is seen as the group’s blessing while there are other factors that may appear more as a curse for XR. There have also been instances, like the train jumping in October 2019, where factions of XR operate in ways that the larger organization may not endorse but are still held accountable to by their current or would-be allies (Nugent, 2020; Mackintosh, 2019; Taylor, 2020). A lack of defined leadership also means there can be competing ideas for XR activists: some want XR to bring about the end of the current political system, while others want to see XR influence through the current political system (Taylor, 2020).

In addition to their organizing structures and guiding documents, Extinction Rebellion’s founders were deliberate in outlining the type of language they would use in their communications. XR is marked by their use of emergency-oriented language, rather than trying to appeal through political language with allies on the left or right (Mackintosh, 2019). They have depoliticized themselves in a way that may have mass appeal and provide resources that give communities the ability to speak to their peers in a way that promotes the XR message but still can be made context specific. One such resource is known as “the talk” that outlines the crisis and what would happen without immediate action and was drafted to be deliverable in a range of places including cafes, pubs, and universities (Taylor, 2020).

## **The Impact**

Extinction Rebellion is still an active organization, but their priorities and tactics change as they gain

new information from the public and their peers in organizing spaces alike. As the public has seen increasingly risky actions of civil disobedience, including the soup and Sunflowers action in late 2022, their support goes down for demonstrators and their causes (Boyle, 2023; Shah, 2022). With declining support, XR has highlighted the importance of mobilizing across crises and 2023 appears to be the year that more community-oriented approaches will be pursued (Extinction Rebellion UK, 2022) with acts of civil disobedience still sprinkled in where deemed appropriate.

As XR has swelled in participants and their name recognition has grown their influence, their actions are more closely scrutinized. This seems to have made them more wary but it seems that this institutionalization of XR means that more radical groups, like Just Stop Oil, can still shock the masses as less risk-adverse actors (Boyle, 2023). With that being said, there appears to be a diminishing return on novelty in public disruptions and civil disobedience (Taylor, 2020).

## **Understanding the Organizing**

### *The Context*

It appears that the environment was primed for Extinction Rebellion to excel in capturing the attention in the ways that they were able in 2018 and 2019. From today's vantage point, there appear to be trends that can support their status as a major player in the climate movement including the fact that CO2 emissions are still rising and fossil fuel infrastructure is still being approved by governments under pressure from the businesses who want to see their profits soar. And while there is a growing sense of climate dread and doomsday narratives with concern from the public mounting, other trends indicate there is also declining support for movements to capitalize on sizeable protests and disruptive tactics.

The XR culture is a unique one that provides space for their tactics and networked structure to flourish. They reject polarity and the use of politicized language to embrace the truth about the future – as well as the likelihood for extinction. Through their value statements and demands, they also emphasize that pressure should be placed not on individual habits of consumption, but on the institutions that perpetuate limitless extraction of the earth's resources and emission of greenhouse gases. To get in the way of these institutions, XR's foundational tactics of mass arrest and large displays of non-violent civil disobedience, as well as current tactics aimed at supporting community organizing and advocating for citizen assemblies that increase public support means that their toolkit can continue to evolve and adjust to the needs of those communities.

Some of their emerging innovations that can contribute to the organizing space and are worth reflecting on include the space provided for iterative organizations that stem from the larger network to

test novel approaches to protest and organizing without having to gain approval. This can be seen in the formation of XR Youth and Just Stop Oil. There is also a growing expectation in XR's networks that organizations who support those communities that will be impacted first by the climate crisis be prioritized.

### *The Participant*

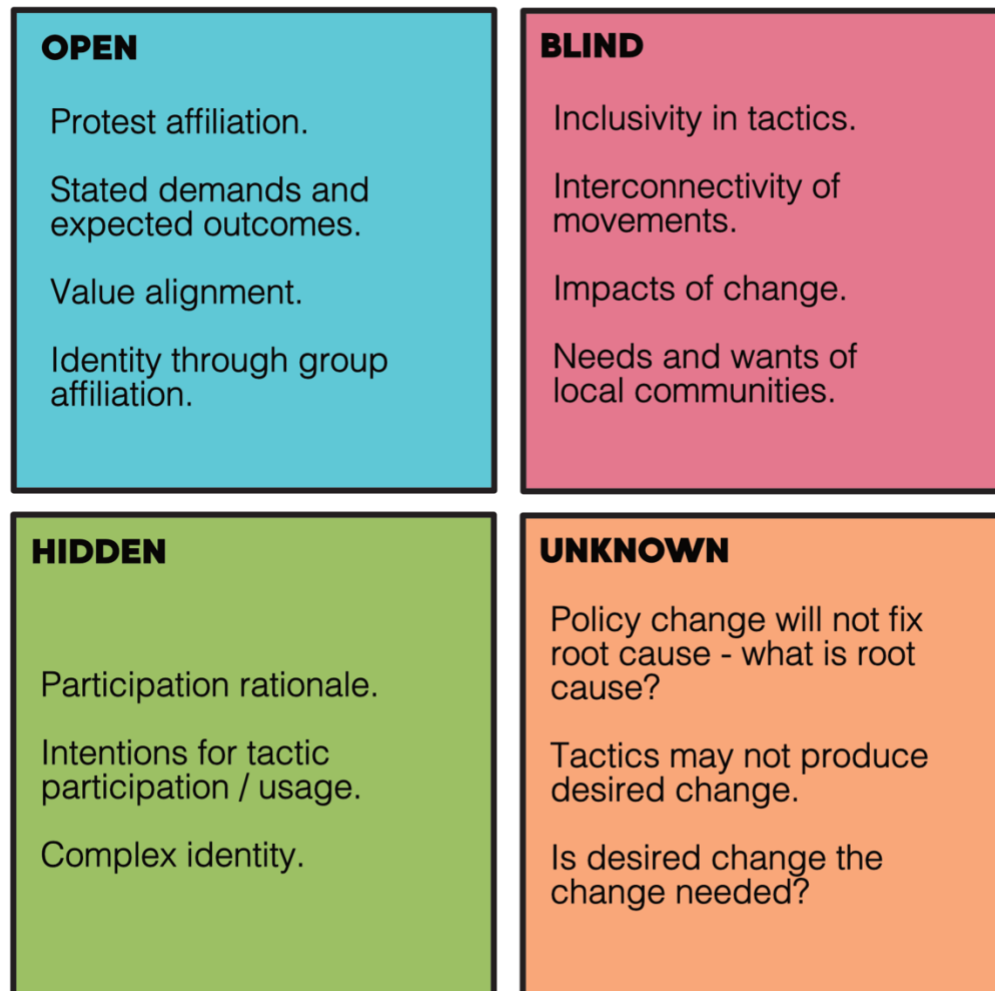


Figure 7: Johari Window for Extinction Rebellion.

The participant in the XR network benefits from a loose leadership structure that unites affiliated groups with their core stated values and demands. Through their network of organizations that cater to individual identities, there is also space for participants to find ready access to groups whose organizing tactics fit their abilities and the limitations they experience in the current system.

In terms of what is hidden by the participant is the personal reason for their participation of the movement as well as their intentions behind the tactics and protests that they choose to participate in. The participants may also have a more complex identity than that of an overarching group like XR Youth, XR Science, or XR UK which may cause friction with the larger group or lead to a fluctuating sense of loyalty as demonstrations are carried out.

This may come up specifically in the blind category. Not all tactics are considered inclusive, such as mass arrest, but until these tactics are used, they cannot be evaluated. Blindness in the movement also exists in what a community needs or wants in comparison to what Extinction Rebellion or a participant of XR is able to accomplish with the resources they have available to them.

Like other movements explore, there is an unknown in whether the tactics used will produce the desired change and if that change is the right one. With XR, their strategy lays mostly in mobilizing to protest the status quo, but they are not particularly clear on what the alternative future is if they were successful and how to support participants in this envisioning.

Blindness also leads to not knowing what is next in terms of tactical approaches to the movement or other movements at large. From the perspective of the participant, this may end up being a tactic that they are no longer comfortable with or can no longer participate in.

### *The System Actors*

At the citizen level, there are three main actors involved in Extinction Rebellion's ecosystem. These include the protestors and the organizers, who are allied members of XR's mobilized forces. The third actor is of course, the general public. These are the people who although may support the XR participants as protestors and organizers, may also take up issue with certain tactics. The fluctuating support demonstrated in the polling of the public over time indicates that the general public are likely to be in a state of oscillation with XR-affiliated actors.

At the level of the organization or institution, we see the groups that make up Extinction Rebellion's network. These are the XR founders and leadership team through XR Global as well as the subgroups that provide connections to the Global team through geographic, expert-oriented, and age-related affiliations. These groups are typically allied, but there have been instances of oscillating agreement between tactics and strategies undertaken by different actors, although the unification through their stated values and demands gives them the space to remain collaborative through hiccups. In terms of XR, they have considerable knowledge and power to influence the affiliated organizations and the movement.

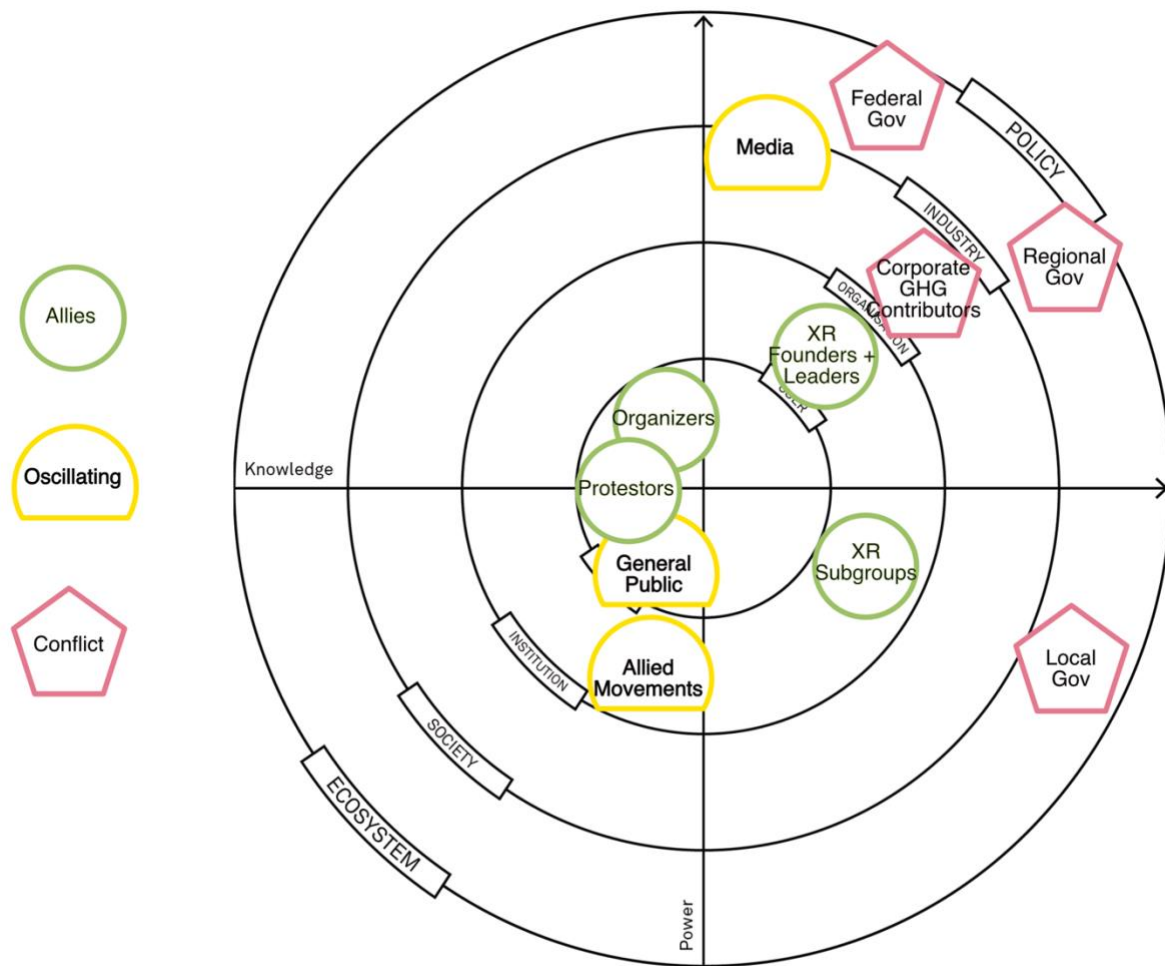


Figure 8: Actors Map for Extinction Rebellion

At the level of organization, but highlighted for having a more oscillating connection, are the allied movements who are either currently in support of XR or have the potential to be. These groups account for the feedback generators that may make statements of support or conflict depending on the actions undertaken by XR, as has been seen in moments of mass arrest tactics or demonstrations that harm marginalized groups more than they help to tell the story of the climate emergency. Although they have significant knowledge, they may not have the power to directly influence XR's tactical and strategic approach to organizing.

At the levels of industry and policy, we have actors who have considerable knowledge and power and are typically in conflict with the goals and aims of XR. While concessions may be made by the government and changes undertaken by the corporate climate crisis contributors, there are also policies

coming into play that reduce the ability for XR's tactics to remain unchallenged and put participants at risk.

One actor to make note of, as with any social movement, is the media. The media is likely to be in oscillating alignment with the movement as the actor most likely to reach mass audiences with the narrative that they control. For XR, the media coverage was quite in-depth and amplified not just the opposition to the movement but founding stories of the group that contribute to cultural formation. They are high knowledge and high-power actors as they are often the dominant actor in narrative formation if the organization and movement is not deliberate in forming these stories for themselves.

### *The Organizing Ecosystem*

Extinction Rebellion's organizing ecosystem is robust. The core of their work is facilitated by steering groups that offer on-the-ground facilitation at a regional level and allow the influence of the larger organization to reach new audiences with target messaging. This core working group is supported by the advisors of the organization that include XR's own expert areas like XR Doctors, XR Farmers, and XR Muslims as well as the feedback organizations who let them know if their tactics are hitting the mark or falling flat for potential allies. At this level are the citizen assemblies that XR also calls for in their list of demands to support and evaluate climate-positive decisions made at various levels of government.

At the levels of partners, there are the research and academic institutions who may be able to support XR's goals with facts and figures to illustrate their narrative while we also see inspired organizations who may be off-shoots of XR or who may organize in the same space under the shared value system without being explicitly affiliated.

At the level of the coordinating infrastructure is XR global who lays out the demands as well as the value system and provides the strategic direction for the organization while allowing for the core groups to facilitate their own experimentation and tactical approaches to support that work.

Finally at the constellation level, XR can operate at the intersection of the climate movement, the justice movement, and the labour movement while also engaging with global governing bodies and policy makers who they strive to influence in their decision processes.

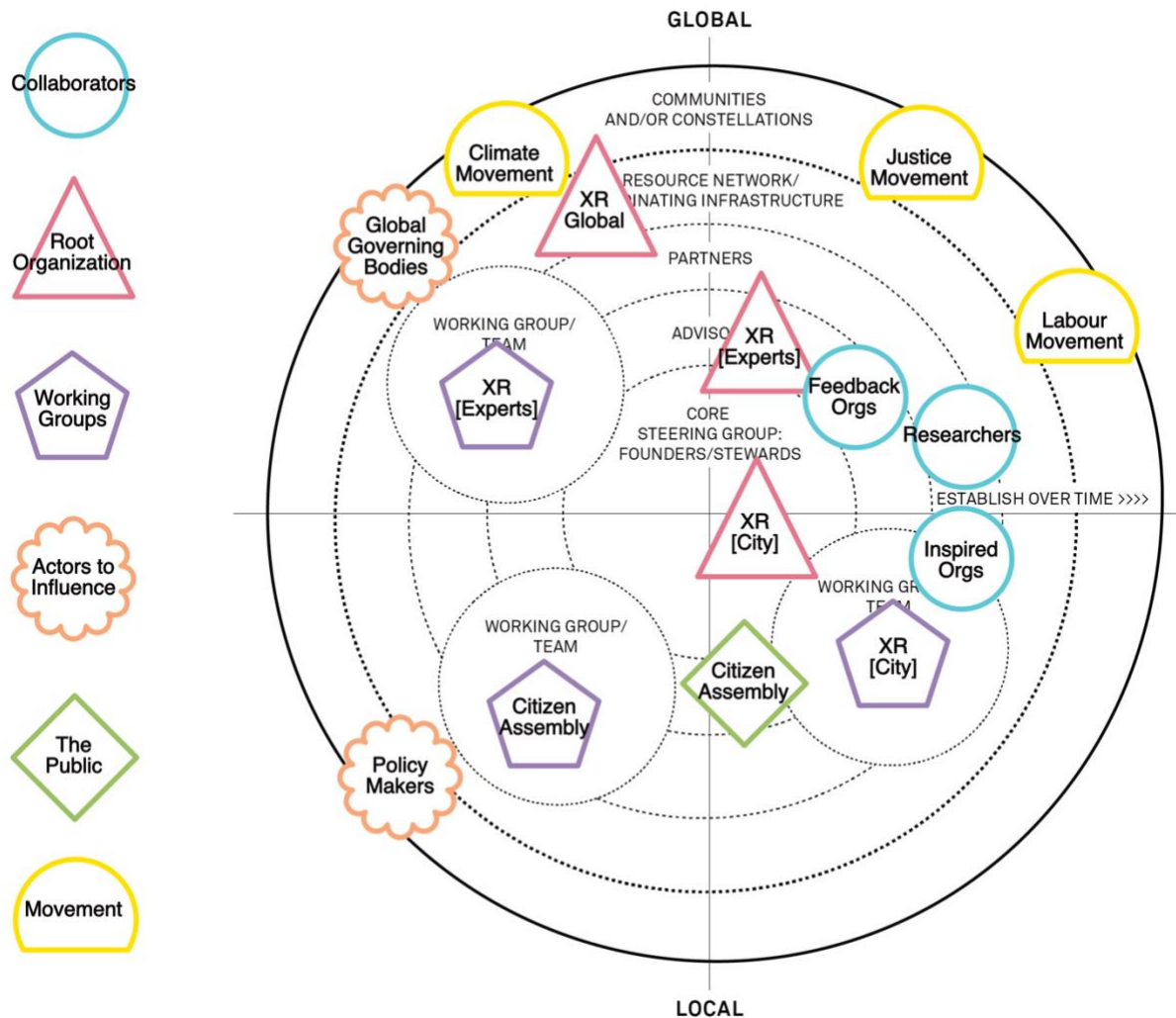


Figure 9: Ecosystem Governance Model for Extinction Rebellion.

### Summary

Extinction Rebellion has demonstrated a unique ability to learn, adapt, and pivot their work to meet the needs of their communities and the public at large to ensure their initiatives move forward. Although they saw their most supportive and impactful year in 2019 and have struggled to identify ways to boost support and engage new audiences, they also have demonstrated the ability to make room for other organizations to experiment in ways that can be too risky for XR due to their name recognition.

Their ability to zoom out and see things strategically and adjust when presented with new information means that they are likely to be around for the long haul, even if they are not making headlines. A shift to growing public support if not engaging new protestors means that they may uncover new tactics that come from the communities and up through the ranks, rather than long-



standing traditions of protests that are more top-down approaches.

## Archetypes in Social Movements

Social movements and popular protest actions, as seen in the previously presented case studies, are not immune from common archetypes used to understand systems activities. These archetypes are presented in causal loops below and draw from Donella Meadows' *Thinking in Systems: A Primer* (2008) and Daniel H. Kim and Virginia Anderson's *Systems Archetype Basics: From Story to Structure* (1998).

### Growth and Underinvestment: Protest without Understanding

Growth and Underinvestment is an archetype that demonstrates the limits of a system when resources are not balanced across functions, which leads to gaps and degradation of the system.

In social movements, the flashy protest tactics often engage public support and drive further public demonstration if there is resonance with the organization's stated mission. However, there are limits to how much this system can grow if proper resources are not allocated to advancing education that supports a collective understanding of the why and the how.

This can be particularly challenging for movements and organizations that arise out of a sudden call to action rather than a slow build with established organizers and networks. Quick, flashy, tactics are important to the social movement, but there must be dedicated human and financial resources allocated to growing awareness, building understanding, and support a shared future vision to ensure sp that when the cameras stop rolling, the work continues.

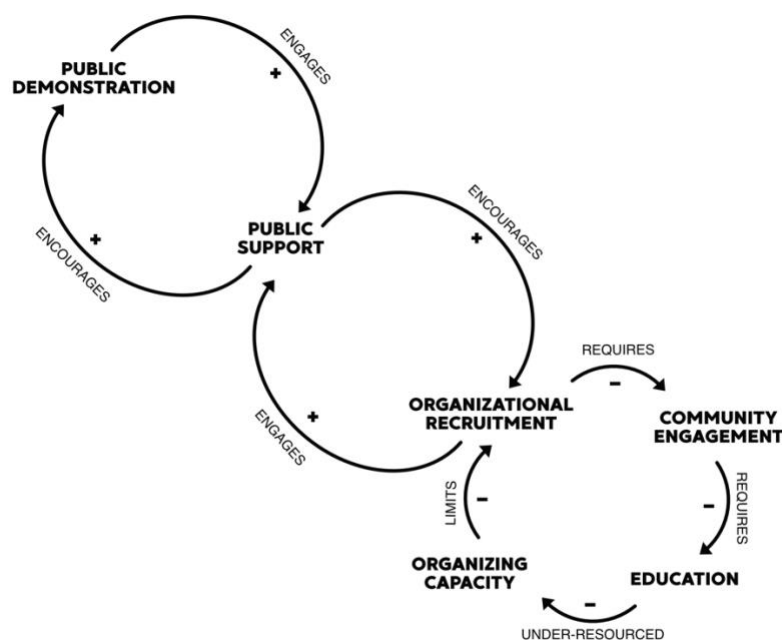


Figure 10: Growth and Underinvestment in Social Change Organizations

## Success to the Successful: Human & Financial Resources

This archetype highlights how those who have been successful are likely to remain successful with more access to human and financial resources as well as policy outcomes.

For social movements who are able to gain quick momentum, the key factor to success appears to be connected to media attention. With increased media attention, they are likely to reach more prospective constituents who will engage with and support the movement. This can leave other organizations behind if the resources are not shared through a leading entity strongly tied to a diversified network.

One characteristic of social movements is a need for a spectacle to be covered by the current media establishment. This takes innovation and capacity building in areas of narrative development, but a quick common approach is to increase the use of radical tactics. These can have their own limits.

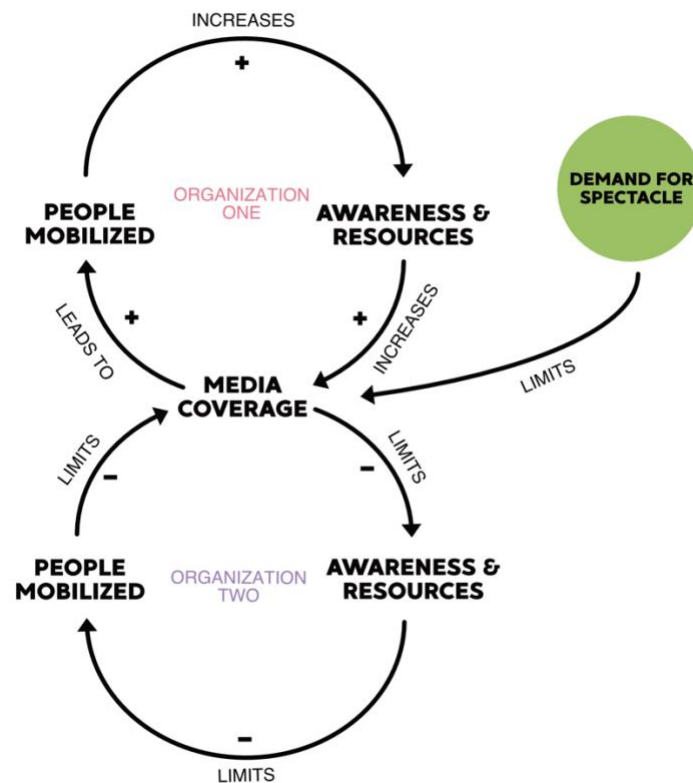


Figure 11: Success to the Successful

## Fixes that Fail: Radical Tactics

Fixes that Fail is an archetype that demonstrates when an intervention within a system is exercised, a positive intended impact can be reduced or reversed from an unexpected outcome. The fix fails.

For social movement organizations who see waning involvement of engaged participants and media attention, they may be more likely and willing to take up radical tactics to gain ground in public awareness. Although this may work for some people, what seems to happen is a reduction in public support for the movement as these tactics become more disruptive to the daily lives of those not engaged in the cause. Radical tactics may limit the potential for mobilizing new sympathetic members when the intention is the opposite.

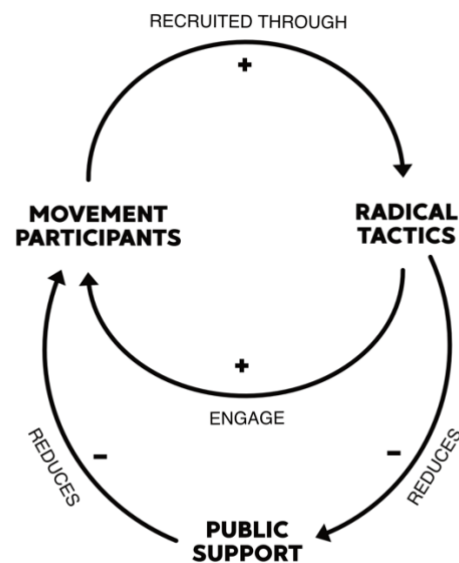


Figure 12: Fixes that Fail

## Limits to Growth: Narrative & Appetite

The Limits to Growth archetype indicates that certain factors and actors within a system are going to limit the ability for progress.

In the social movement sphere, protest movements that gain significant ground quickly and resonate with a larger audience will gain public support, and the larger they get, the more likely it is that the media will cover these demonstrations. With more media attention, comes greater public support, but an appetite and understanding of systems change is a limiting factor to the way in which the media will cover a protest and other activities within a social movement.

As mentioned previously, the media demands spectacle, which are not the kinds of moments that are represented well by systemic interventions but rather for symptomatic solutions. This is where we see another loop come in: Shifting the Burden.

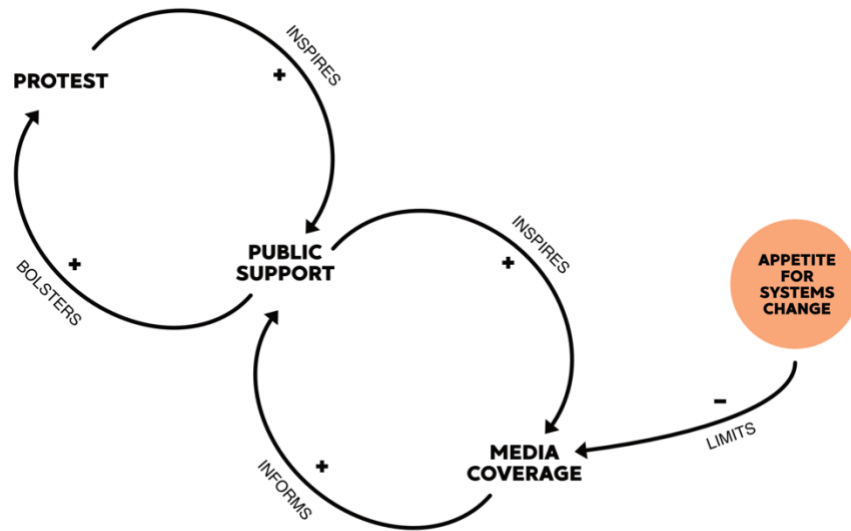


Figure 13: Limits to Growth

## Shifting the Burden: Policy Change, not Systems Change

The Shifting the Burden archetype shows how true change is often hampered by making small concessions — treating symptoms, not the causes.

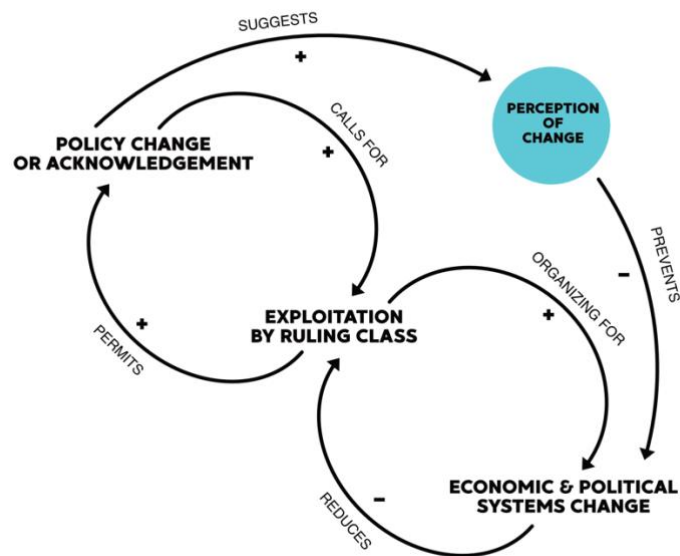


Figure 14: Shifting the Burden

In social movements, organizations advocate for change that is incremental and does not take systems into account. This can look like advocating for policy change or public statements of support

when enough people demonstrate dissatisfaction with government inaction, policy, or breach of public trust that results in civic disharmony. But when the movement advocates for quick fixes instead of system transformation, the general public has a perception of change, without addressing the root causes — which perpetuates the same issues over time.

In many social movements, the exploitation of the working class or a class that structurally has less power for social change than a ruling class is the victim. The ruling or elite class will make concessions to enhance perceptions of change, but these changes maintain and reinforce the status quo of power structures within the system.

## Drifting Goals: Inclusion and Exclusion

The drifting goals archetype arises when there is an expectation for performance within a system, but with high aspirations, concessions are made, gradually reducing the goal over time.

For social movement systems, this has presented itself subtly in the identities of participants that are expected to be included. When the goal is mass mobilization, but the expectations of that movement exclude certain identities or refuse to engage with certain identities, believing that no common ground can be uncovered, the out group becomes disengaged and will likely appear as an opponent to the social movement and organizations despite possibly having similar future visions.



Figure 15: Drifting Goals

## Consulting with Systems Change Makers

## **Systems Change Makers**

To best understand the use of systems logic and systems thinking in social movements, the expert profile was identified as necessary for consultations with systems change makers as the intersections of these concepts is still largely within the realm of academia. To analyze some of the tactical choices made in the case studies through this lens requires the expertise and insight of those who study systems thinking and how to apply it in practice.

Experts were selected based on their involvement in social change organizations with an approach that actively uses systems logic in their work. Their work extends beyond just one movement and demonstrates characteristics of a hybrid organization that supports coalition formation.

A summary of learnings drawn from these key themes is provided in the next section, and the experts will be referred to as “systems organizers.”

### **Systems Organizers & Primary Organizational Affiliation**

Indra Adnan - Alternative Global

Kevin Best - Odenasaan

Steve Waddell - Bounce Beyond

Greta Zarro - World Beyond War



# Experience & Expertise: Systems Thinking in Social Change

Key themes arose out of the conversations with the systems organizers in how visions are set, people are engaged, and pathways are laid for a shared desired future with established organizations and those on the fringes of political or change participation.

## Defining Vision

The first step involves defining the a vision. A vision imagines a desired future and is important groundwork as jumping too quickly to goals can cause confusion when individuals or organizations misinterpret what the end objective of achieving a goal actually is (Waddell). It is recommended the vision be established first, through a backbone organization, and then values can be selected within a larger group of coalition organizations, with each organization outlining their strategy and selecting the goals that will support their work (Waddell). This gives opportunities for different organizations who have varying calls to action and individual identities to still participate in achieving a desired future without having to follow a prescribed set of expectations that may result in many organizations vying for the same financial and human resources to achieve success.

Three of the four identified their guiding visions to be life-focused (Adnan, Best, Waddell). This is not just a vision that is meant to support human thriving, but a livable future on this planet. Their approaches differed, but their visions remained the same: economic, political, and social participation that encourages a flourishing future for all. Only one expert outlined an objective end point that would mark the organization's success: no more war (Zarro). These visions are each grand, but there was a unifying principle that arose and was also identified in movements who do not use systems thinking deliberately in their work: the status quo of our current political economy is not working.

The notable difference between systems organizers and the movements that most are familiar with is that they are not looking for short-term fixes to long-term problems. They are looking for transformation.

## Theories of (Transformational) Change

This desire for transformation was defined in the theories of change that were discussed by the systems organizers, whether explicitly or indirectly. Bounce Beyond's Theory of Change (Bounce Beyond, 2022) is perhaps the best jumping off point and follows a framework that allows first for analysis of the current system state and the methods by which system actors are currently trying to intervene. Here it is identified what is and is not working. Following this is the analysis of transformational activities that

could bring about change, with transformational initiatives connecting to implement radical activity and develop into stronger transformational systems (T-Systems). With further radical activity, this would suggest the formation of a new paradigm.

One area that is not necessarily missing from this framework but is worth stating more explicitly as it did arise in conversations with other systems organizers, is the requirement for a prototype of what transformational change could look like to be implemented, or at the very least proposed in an accessible way (Adnan, Best, Zarro). This will support the understanding of organizations and individuals to see how their work contributes to the overall vision and that they have agency to be there — no permission required (Adnan, Best).

## **Relationship Building as a Tactic: People and Planet**

So how does this happen? For the systems organizers, it requires nurturing community and relations with people and the natural environment (Adnan, Best, Zarro). Concepts like Global Action Networks (GANs) which are “global multi-stakeholder change networks” (Waddell), Community Agency Networks (CANs) which are physically localized containers for participation and action (Adnan), as well as physical and digital gathering, sharing, and consensus-making spaces matter here (Best). Places where people can connect in real time, in real space, and feel a part of a larger movement are important. These do not need to be spaces where decisions are made or formal networks (Zarro), but where opportunities for discussing what change is needed and the possible solutions can be had with recommended resources pursued or provided. This also brings opportunity for action to a very regional context, where tactical interventions or campaigns may be finessed to resonate with more people.

## **Transforming Identity**

But in the act of gathering comes a set of challenges that the systems organizers highlight as something they very specifically work to acknowledge and support: identity. In the process of coming to realize how the current systems are not working for most people, there is also a need to understand very specifically how systems impact individuals differently based on their identity(ies). It is not about asking anyone to give up their identity or to set it aside, (Adnan) but to recognize that fragmentation is not going to be a solution for any one group to achieve what they want, either. There is a need to unify and shift from an approach to identity that considers only who they may not align with, but instead to who they can align by recognizing plurality and intersectionality is important in shaping a future world that works for everyone (Zarro, Best, Adnan, Waddell). We must believe in and deliberately a world on

the other side of transformational change that makes space for all. Otherwise, if we reduce ourselves only to a selection of identities, social movements will build another system that fails significant groups of people. Collaboration is required to meet the vision (Waddell).

## **Story & Narrative: Taking Back Control**

Another challenge that perhaps is harder to work with is the institution of the media. The barriers that the media structures present to current transformational change initiatives and the story system that must arise for a flourishing future were a key theme that arose in conversation with the systems organizers. But of course, a new news media would require a paradigm shift. Specifically mentioned in the context of anti-war and in building different political systems, the news media as an institution in and of itself, can make it difficult to break through the status quo (Zarro, Adnan). Organizations have to work to build mediums that provide alternate sources of information that contribute to the soft power of narrative (Adnan).

This belief in an alternative future or a better future that is outlined in the vision must come from strong narratives and evidence that not only can it happen, but that there is a place for each identity willing to contribute. For those in spaces like the anti-war movement, using significant moments to tell a bigger story can be a good entry point, but there must be sustaining narratives that allow for those new to an idea to delve deeper (Zarro). This means that the stories movements tell must be conscious of the stories that are already being told, not just by large media systems, but the ones that communities and individuals are telling themselves. Telling a new story is not necessarily the answer and telling people that they must do better is not working either (Adnan), so finding new ways to bring people in and to see themselves as part of the change is crucial.

## **Systems Thinking**

Echoing earlier conversations around organizing and second order cybernetics, for some of the systems organizers, systems thinking is not enough. A wholistic approach to not just understanding how something works and how it might work in the future, it is important to understand one's place within the system (Adnan) and that when you reorient yourself to the natural system of the planet — the system that almost every human-made system works to change and alter — and you choose to prioritize life, you head in the right direction (Best). Social change is about changing the culture that alienates us from each other and the natural world.

## Synthesis

## The Medium is the Message: Tactics & Organizing

Through the case study analysis and diving into the work and words shared by the expert consultants, I identify the tactical approaches that appear most commonly within the movements to compare their purpose, their effectiveness, and their limitations — including the ways they may limit a movement if not used in tandem with a variety of other methods.

The identified tactics include:

- Organizing protest with marching or occupation;
- Organizing protest with civil disobedience;
- Organizing with education;
- Organizing with narrative development;
- Organizing with a backbone organization;
- Organizing with identity;
- Organizing with community.

### Organizing Protest with March and Occupation

Protest through marching and occupation is the tactic that most members of the general public would be familiar with through movements like Occupy Wallstreet and Black Lives Matter. This is the tactic that is most often covered by the media in the beginning of a movement or in the beginning of a movement's revival as is seen in coverage of the Gilets Jaunes, Extinction Rebellion, the Freedom Convoy, and Black Lives Matter movements. It is an act to demonstrate solidarity with a strong visual element to convey a universal message: something has to change. The protest is also an accessible tactic within an organization's repertoire as it requires many people to participate, and it is intrinsically public. All are welcome.

The occupation or marching protest demonstrates a power in collectivity and solidarity but focuses on a zoomed out, often one-dimensional level of public understanding. The protest struggles with nuance while it brings attention to a larger movement like climate justice or racial inequality, without necessarily demonstrating that these two movements may show up to the same protest and why.

This tactic has its limits in novelty. Over time, if marching or occupation is sustained, public resentment is likely to build and tolerance for significant disruptions will go down. This is also seen as a breaking point for new recruits — those who would have shown up already have. This tactic also is a standard for participation that allows for people to show up without regularity and limits the long-term

impact of the movement. Once the shock wears off on the elite who the movement is in opposition to, there are likely to be more arrests and less tolerance for consistent disruption. Whether these arrests are a tactic of the organization, like with Extinction Rebellion, or a side effect to being seen as a nuisance, the march or occupation protest can become inaccessible to those from radicalized and equity-deserving identities who the justice system treats very differently.

The march or the occupation, with its limitations, does make the idea of business as usual or the status quo obsolete, even if for a moment. There is no longer an opportunity for the general public or the ruling class to plead ignorance to the issue at hand. However, innovation and new tactics must be used to keep the moment going.

## **Organizing Protest with Civil Disobedience**

Where protest through marching or occupation of a public space meets its limits, protest through civil disobedience comes in as an innovative practice, if only for its shock value. Within the movements already discussed, this is most prevalent in Extinction Rebellion UK's mandate for moderate protest while younger contemporaries like Just Stop Oil make headlines throwing soup at paintings in the UK's National Gallery.

Movements benefit from these sorts of protest and demonstrations through enhanced media coverage and maintaining the issue in the public's awareness over longer periods of time. These tactics may also help to illuminate the gravity of the issue as demonstrators partake in risky and even dangerous behaviour to get the message across. This renewal of urgency is retrieved from the early days of movements when marching and occupation-based protests could still capture headlines.

However, there are significant drawbacks to this tactic that can impact both the perception of the movement and the internal workings and understandings of the movement itself. The perception of the movement will quickly tarnish in the public's eye. Sympathy for the cause as well as a willingness to participate from new members is likely to go down. Movements may also see government intervention through laws and regulations that prevent this kind of behaviour but may also prevent less disruptive forms of protest as well, even in democracies with laws that allow for protest as we are seeing in the UK and in Canada's use of the Emergencies Act during the Freedom Convoy occupation of Ottawa.

This form of protest, like march and occupation, has similar impacts on awareness: more people will become aware of the organization or movement, but they still might not be aware of the desired outcomes. Although this form of protest is more likely to arrive after the march or occupation has ceased having an impact, it does still drive these more moderate tactics further into obsolescence.

## **Organizing with Education**

Education is an important part of any movement, both its aims to encourage understanding among the general public, but also for those participating in the movement itself. Education can look like an informational website, regular webinars, lists of links and resources for members and non-members, forums for discussion, and public statements. It enhances the understanding of the issues at the micro, mezzo, and macro scales of the movement and encourages narrative cohesion as well as identity formation through a unified understanding of the values, intentions, and goals of the movement. With an outward-facing education priority, the information that is shared with the public through the movement may also better encourage participation in the next demonstration or activity and make it more difficult for the media to present counter-narratives to uphold the status quo.

An education tactic can also be a principle that an organization adopts for itself to ensure that new information is able to make its way into a movement to encourage new priorities, new tactics borrowed from other organizations, and new participants. Focusing on education can retrieve knowledge or approaches that were cast aside in moments of reactivity when groundswell support drives people into more public demonstrations rather than reaching out and building networks through shared understanding.

This tactic grounds acts of protest in context, but there are risks associated with prioritizing education above other tactics or without incorporating other tactics into the toolkit. If knowledge gathering remains a priority while action is left off the table, it becomes more difficult to test theories and experiment with new tactics or approaches to organizing to build support and advance the goals of each organization, leading to stagnation.

## **Organizing with Narrative Development**

Narrative development is often taken for granted as a natural or automatic process within social movement organizations, but it is upheld as one of the deep system functions by Waddock et al. (2022). It is worth carefully considering the usefulness of this tactic with more deliberate focus paid to understanding how each organization uses their narrative approaches and how these can cause disconnect or uplift the overall change message.

Narrative development focuses on storytelling and enhancing the ways that this seemingly natural process can be better utilized within an organization to build a shared culture of understanding that is able to confront the established paradigms of the current system. This can promote movement awareness by finding new channels for information transfer and build participation with new audiences.

It can retrieve histories and a sense of belonging for those that may have been lost from the collective movement when other tactics may have alienated.

What this can reverse into, particularly in contemporary politics, is a reliance on narrative or knowledge transfer without providing an opportunity for experimentation – much like relying only on education. Narrative development, without careful consideration, can also lean into doomerism and fatalism if only one possible future is highlighted in the stories that are told.

When done well, narrative development as a tactic can balance the power between dominant media narratives and what the movement or organization is able to communicate to the larger public themselves. This tactic can also reduce confusion of how potential participants can fit into the movement and what a successful movement means for a shared future.

## **Backbone Organizing**

The term backbone organizing comes from Kania and Kramer's (2011) term "Backbone Organization" to indicate an organization who supports the work of many organizations within a movement to achieve collective impact. This tactical approach must occur at the organizational or mezzo level of the movement as it requires organizational awareness and networking to function well. What it enhances within social movements is the ability for organizations to coordinate their output among and across organizations who may have different identities, narratives, or regularly utilized tactics for achieving their aims. It revives a collective organizing principle that unifies members and organizations to see past micro-level nuances to a larger picture and a larger shared goal.

What is more likely to become obsolete with this tactic is a tendency towards resource scarcity in organizing — where funds, people, and other needs are seen as something to be used by one organization at the expense of another. With a backbone organizing tactic, there is a bird's eye view of the organizations within the network that may be better able to utilize a coordinated approach through shared resources to achieve the aims of the movement. There is also likely to be a reduction in thinking in binaries when a plurality of ideas exists within the organizing network.

Where backbone organizing has to be careful is in a tendency towards bureaucracy when many interests exist within the same organizing entity and the method for achieving outlined goals varies. Bureaucracy is a process that upholds the current system and creates redundancies to ensure that system preservation. For a social movement, perhaps holding up the system is desired in order to make a case for the replacement of a system that is no longer working or that the movement is working to unravel. But the opposite can also be true, and we see it in the labour movement and unions. Over-



bureaucratization and the formation of institutions has served to uphold the system currently in place through a bargaining process that has been established by an elitist class of policy makers in collaboration with the employers who must maintain a certain working standard to ensure profitability. Being comfortable with impermanence is important for backbone organizations to always allow space for innovation and change to transform the movement.

## **Organizing with Identity**

Using identity as an organizing tactic and being very clear on what identities align or do not align with the organization can be a tactic employed by an organization effectively, but can also result in some limitations for a movement as a whole. The primary opportunity to enhance the impact of an organization by appealing to strong identity formation is that it establishes a strong sense of belonging among participants and can be a space for those who have been made marginalized by the system to intervene collectively. For the movement as a whole, made up of identity-oriented organizations, this can also encourage pluralism, but work must be done to ensure that conflict is mitigated. If conflict is not mitigated, organizing with identity can cause exclusion, the policing of participants, or the refusal to collaborate within the movement. This can harm the ability to scale without finding ways to collaborate and mitigate conflict very difficult.

Organizing with identity can retrieve a collective sense of belonging and impact while making the sense of helplessness, hopelessness, and isolation of individuals within the organizations obsolete. It can call up past figures of successful movements that formed around similar identities to feel inspired. This of course must be done with careful consideration of narrative development as well as education to be truly effective.

## **Organizing with Community**

Not necessarily a flip side of organizing with identity, but perhaps a more inclusive approach, organizing with community can give space for multiple identities to exist together around a shared localized cause. This opportunity also gives rise to pluralism, space for multiple organizing approaches to come together, connection, and change at a local level. This retrieves a method for organizing that is not based in global or high-level movement objectives which can be hard to frame in a way that resonates with those whose locations may not experience the same impacts that are currently being used in the movement's dominant narratives. Community-oriented organizing reaches from the bottom up rather than pulling from the top down and gives members meaningful action itineraries with resulting impacts on their own lives that they are better able to point to as progress.

It can, however, reverse into issue-specific reactions, rather than connecting to larger, long-term goals for change. Isolation from larger movements whose resources and networks can support community-led initiatives while providing resources that have worked for others can be a missed opportunity if there are not strong relationships with hybrid, backbone organizations who can bridge these gaps.

## **E5: A Framework for the Everyday Movement**

### **Framework Goal**

The primary goal of the framework suggested as a result of this work is to build awareness of transformational potential and support capacity building in social change movements that have typically utilized standard protest tactics and dis-organizations to influence what ultimately results in policy change as a best case scenario, and crack-down on protest tactics in one of the worst case scenarios. By suggesting a framework to build transformational awareness — or confidence in a transformed system — this could lead to more organizations within social movements contributing to transformational change frameworks like T-Systems (Waddock, et al. 2022) from a more established, strategic, and advantageous position.

The objectives of the framework are to provide organizational capacity throughout the cycle of a standard protest movement that could support systemic interventions rather than settling for symptomatic concession events. This framework is coalescence of the thought leaders and models that have been presented in this report, supplemented by the insights gained from the case studies and experts consulted and applied to a standard protest cycle.

### **Framework Foundations**

The E5 Framework draws inspiration from three models: Marty Jacobs' Emerging Systems Transformational Change Model (2016); Steve Waddell and Sandra Waddock's 5 Ps: Dimensions of System Transformation (2021) and Sydney Tarrow's Protest Cycle (1988). It is also inspired by the work of Extinction Rebellion and World Beyond War's non-partisan and long-term strategic actions.

The Emerging Systems Transformational Change Model (ESTCM) was developed by Marty Jacobs to address multi-sector change efforts and comprises activities that fall under five phases: Discovery and Dialogue; Depending, Refining and Assessing; Infrastructure, Communication, and Coordination; Ongoing Implementation and Progress Reporting; and Learning, Celebration, and Sustainability (Jacobs, 2016). Each of these phases aims to encourage the activities and learning processes that are required for transformation and restructuring or rebuilding a system (p.6). In the E5 Framework, similar activities will be outlined, but occur in different phases, and there is deliberate focus on defining a shared vision of the future.

The five Ps outlined in Waddock and Waddell's framework provide additional layers and lenses by which to view the system as a whole while simultaneously giving opportunity for the actors and

organizations within the systems to see themselves through their activities and relationships to one another. The five Ps are: purpose, paradigms, performance metrics, power relationships and structures, and practices such as policies, procedures, and processes (Waddock & Waddell, 2021). The purpose and paradigm are particularly relevant to the E5 Framework's first phase in which stock is taken to understand the current system through the lens of shared purpose and how to define a future that can be bridged between the current and desired system.

## Understanding the Protest Cycle

Before suggesting the framework phases for interventions, it is important to look at the archetype for a typical protest cycle that has presented itself in the case studies analyzed and is a foundational framework in social movement studies (Tarrow, 1988). The current system is one of political and economic capital at all costs. The status quo — our governing structures, our economic processes, and our habit of resource extraction to prioritize growth — can be considered the status quo. Due to the inherent limitations of growth, when a status quo is maintained for too long, an elite governing body will perform a power test. This is when the ruling class attempts to gain a bit more power to preserve a system that is eroding or whose growth has stagnated. This is likely to look like a policy change, a restriction of rights, and encouraging business to expand even when the expansion is known to cause damage. This might also look like doing nothing in the face of revelatory information when something must be done.

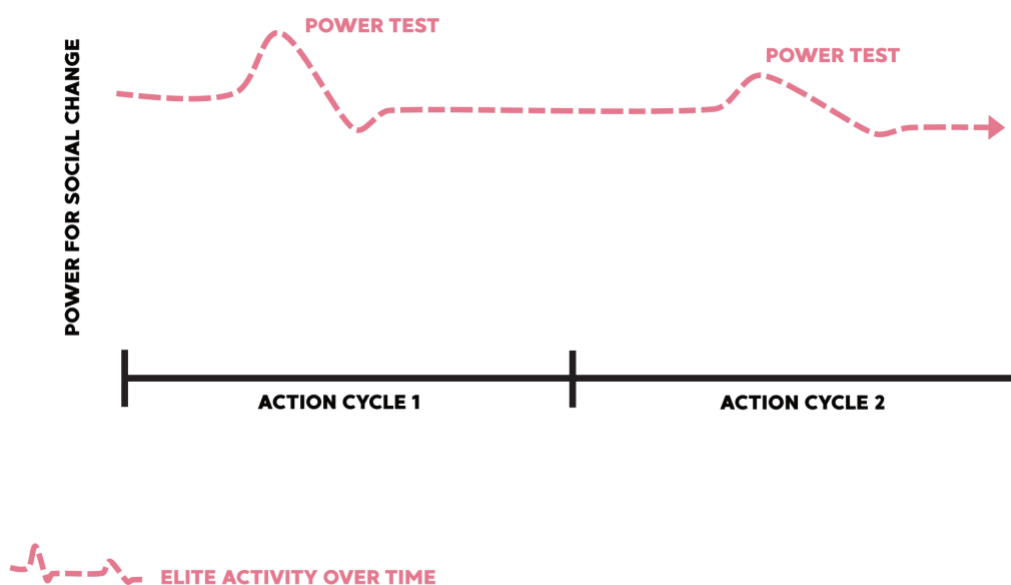


Figure 16: E5 Framework - Elite Power Test

This elite power test, is also considered a catalyzing event (Kriesi, 2007, p.80) when the organizing capacity of a social movement, either through informal networks of people or established partial or complete organizations, are able to grab on to this catalyst and build public support quickly. That is not to say that this is the beginning of the movement, but the straw that broke the camel's back in a "longstanding conflict" (McAdam et al., 2001). As public support grows through networked activity of the movement as well as through media coverage seeking out spectacle and novelty, the governing ruling class entity experiences pressure to reverse or alter the results of the power test. Here, this moment of concession is provided. This act of concession is likely to appease the general public or the recently mobilized participants of a movement who are unaware of the potential for systemic change. This is where the system preserves itself and the status quo is maintained.

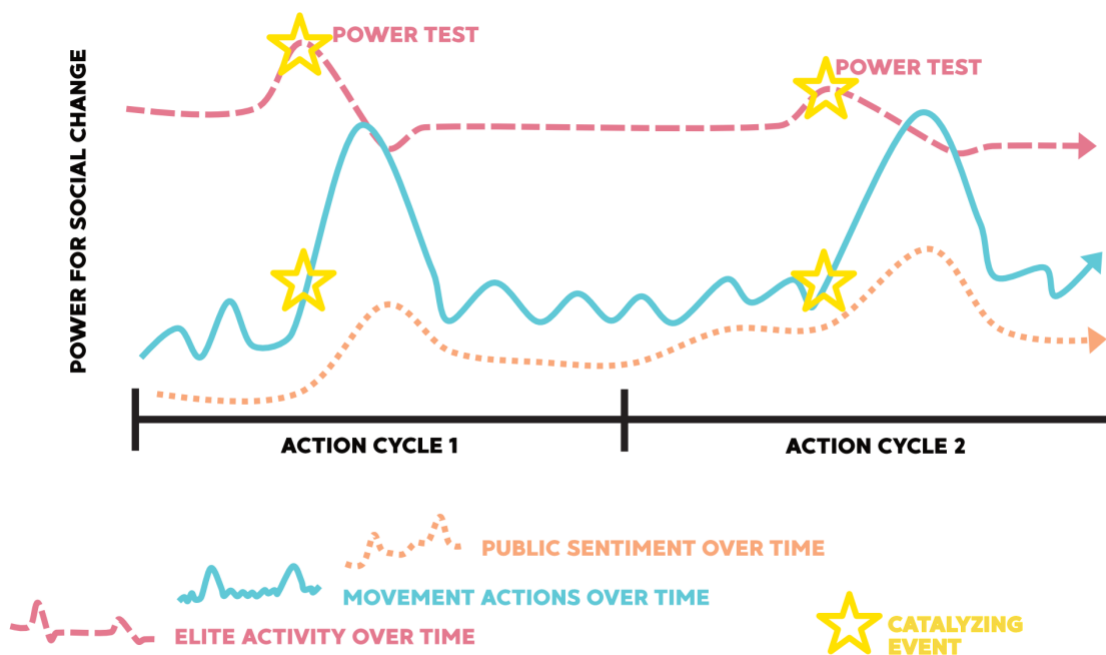


Figure 17: E5 Framework - Catalyzing Event

Those organizing in the system, who see the potential for true transformational change, lose support quickly. The general public believes the war has been won and they are drawn to routinized lives once again (Tilly & Tarrow, 2015) while significant media coverage dissipates and moves to the next big thing – social movement or otherwise. This is where the established organizations in the movement may give way to new organizations who are willing to try innovative and likely radical tactics to gain public support and media coverage. This cycle moves in smaller waves for a while, giving space for organizing, but likely with less resources, until the cycle of action through an initiating catalyzing event

occurs again. It is worth noting that there may be limitations to how long the general public will allow for one movement's cycles to dominate the media and the cultural discourse before they are deemed ineffective and their specific ability to engage and mobilize vanishes.

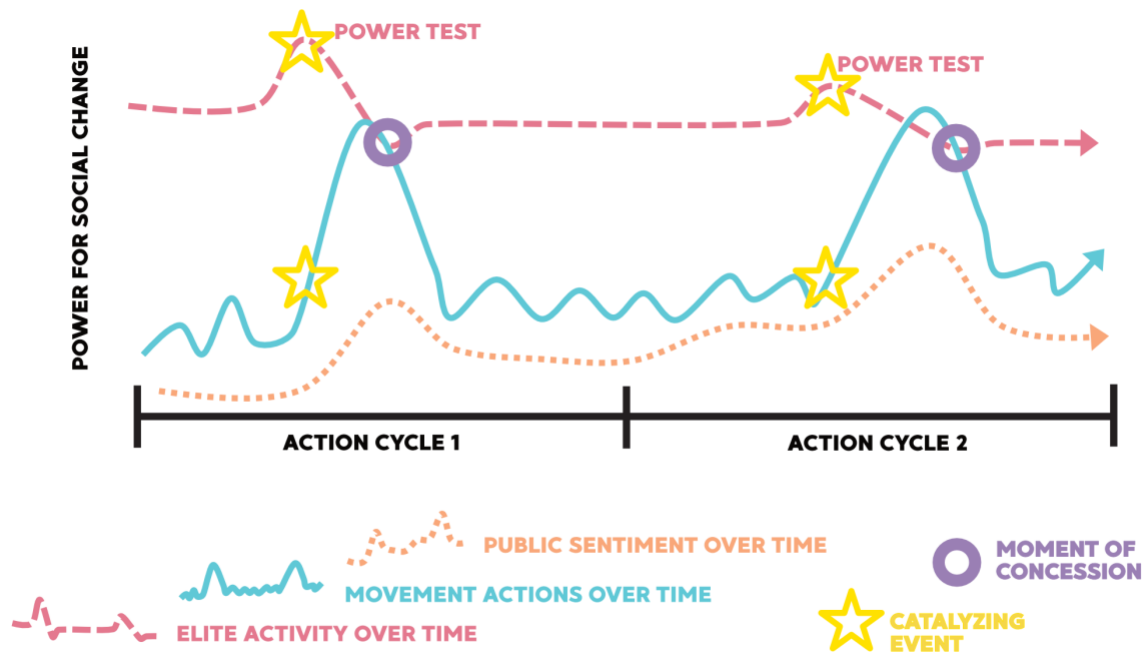


Figure 18: E5 Framework - Moment of Concession

## Intervention Potential

Combing the work of scholars in the field, insights gained from selected case studies, as well as subject matter experts in systems and organizing, the below framework is meant to act as a guide to support transformational awareness and capacity building within organizations with the goal of sustaining movement activity and providing space for innovation in the action fields represented within a protest cycle.

## E5 in Contemporary Social Change Movements

The proposed model integrates systems concepts for social change movement building over time while utilizing the standard archetype of the protest cycle to provide areas for intervention within and across the timeline. All movements are made up of actions over time with a goal to shape laws or agreements in favour of a public position. Movements are not only formed to change positions within government or policies but are also complex social systems with the intent to grow adherents to the public position. This is done by convincing or persuading the general public and defined audiences that can either passively support the movement or engage as active members.

The E5 Framework for Social Change that I suggest involves five actions to support this work: Envisioning, Empathizing, Engaging, Educating, and Evolving. Each of these actions is the title of a phase within the framework that would ideally be used by a backbone organization within the action field to organize their activities. These phases can provide mechanisms for intervention at various moments within the standard protest cycle that may result in outcomes of a more organized and engaged public as well as the transference of information between social movements. This ultimately may support and proliferate systems thinking as a standard practice for organizations within the social change system and build transformational confidence at the local community level to support greater transformational capacity in the system as whole. Although these activities are presented in an order, they are not necessarily linear and can benefit from experimentation, evaluation, and iteration throughout the protest cycle.

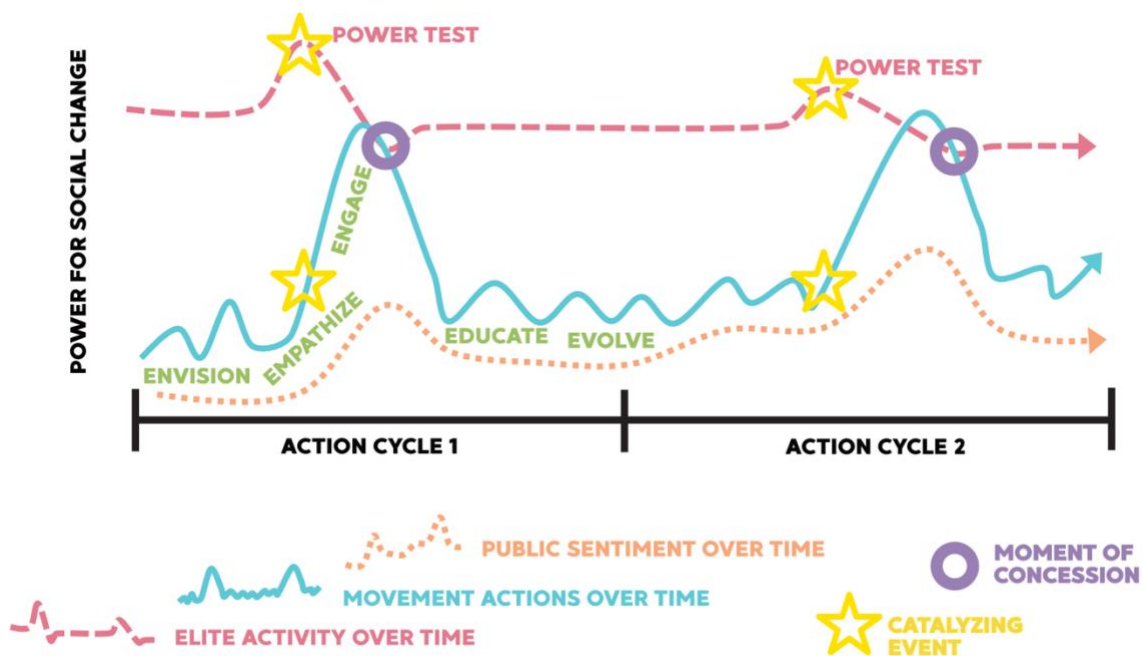


Figure 19: E5 Framework Applied

## Envision

### Aim

In the Envision phase, the aim is to provide a vision for current and potential constituents of the movement and the organizations that currently represent the organizing capacity in the space. This phase is drawn from Jim Dator's (2009) futures visioning process, in which experiencing, envisioning and institutionalizing the defined futures are key components of organizations who are looking to change

the current system (p.2-3). The vision needs to be galvanizing yet realistic and detail a future that is not simply a utopia, but one in which the constituents of a movement can imagine themselves there and how they might arrive. It must be a broad, inclusive, and achievable vision in which many organizations and individuals can find clear and easy paths of connection with their own stated mission, goals, and suite of tactics.

Envisioning may be best accomplished in the fluctuating ebbs and flows of a social movement cycle between the catalyzing events that typically engage mass support through public demonstrations and protest. This is where organizations persisting in the space of a movement, struggling to recruit or sustain public attention, may be inspired and find opportunity to engage across cycles of protest with others in similar spaces, asking “What next?”

### *Tactical Approach*

Here, the primary tactic is narrative development, already highlighted as an important factor in deep systems thinking (Waddock et al., 2022). The narrative that builds the vision, must weave together both the present and the future systems as well as those participant identities that the organization is already familiar with, so that they may see themselves as active members of the two worlds and the systems that they are attempting to change. Narrative development relies on a deep understanding of the current cultural paradigms and realities that shape the current system (Jacobs, 2016; Waddock & Waddell, 2021), as well as the culture that a movement strives to create. In this context, the backbone organization will be served well by practices in foresight that use an analysis of present-day trends to understand future possibilities.

### *Organizing in Systems*

Transformational change requires not repairing or preserving the current system but providing an avenue towards a new value-based system (Jacobs, 2016). This value system must be imagined to be achieved, and in order for it to be truly impactful, it must be co-created with multiple organizations or at least with many identities in mind. The next phase, Empathizing, will support this work by testing the narrative and the imagined future by connecting and collaborating across networks with other organizations and their constituents.



## **Empathize\***

### *Aim*

In the Empathize phase, the primary aim is to establish the values that will contribute to the overall vision, but to ensure that those values can find resonance across identities and affiliations for those inside and outside of the current collection of actors and stakeholders that comprise the social movement in its current form. This will be challenging, because the current political system upholds the fragmentation of identities and binary thinking with long-established institutions that encourage polarization. Therefore, empathy is so critical at this level as participant in the movement must be willing to see how those they disagree with can share their values and see themselves in a future together. This phase works with the engagement phase as an opportunity to experiment in smaller groups and in more localized environments to determine the effectiveness of the established future vision.

### *Tactical Approach*

The tactical approach in the Empathize phase is about showing up, actively listening, and engaging in dialogue to understand potential movement participants. This is likely best done in community spaces at a local level, meeting people where they are. It may be beneficial for the backbone organization spearheading these efforts to take the knowledge that they gain and create systems and actors maps to draw connections between the needs and expectations of the identities and organizations that they come in to contact with and the ways they may be able to identify commonalities and pathways to the established future value system from the Envision phase. Testing the resonance of the stories and framing of the cause can be productive in this phase.

### *Organizing in Systems*

Within the protest cycle, it is possible that empathizing at the point of catalyzing event will provide important insight into what mobilizes people at specific moments within organizations. Empathizing through dialogue may help the backbone organization understand what will support a consciousness raising in individuals and how conflict can be transformed to support organizations in realizing the impact that sharing a united vision can have.

## **Engage\***

### *Aim*

In this phase, the organizations who have worked with the backbone organization must go out into the field and engage with those who are already mobilized and those who could be. This is where testing the vision and value statements in the real world and with real people matter. It is recommended in this phase, that the value statements not be presented outright, but space be made for those potential constituents can be heard and their values outlined and tested against the value statements made by the organizations whose resources and contribute to supporting the needs of the people they gather with and the identities that they represent.

### *Tactical Suggestions*

Engaging in the protest cycle involves showing up, even during the activities that do not typically lend themselves to true systems transformation, such as protest and occupation. This can also look like community townhall sessions and continuing the dialogue from the empathize phase. Here, it is also worth noting what the tactics that other organizations are using and finding ways to incorporate these into the backbone organization's repertoire or connecting tactics between organizations that are not currently in dialogue together. This is will also be supported in the Educate phase.

### *Organizing in Systems*

Engaging is the art of acting. Moving beyond the knowledge gathering phases of envisioning and empathizing and into concrete action that can be seen across organizations as an act of solidarity and togetherness is critical in sustaining confidence in newly connected groups within the social movement. By engaging with new organizations, this also extends the reach of an organization's own tactics, and introduces new opportunities for innovation and learning to implement similar effective strategies from new partners into their current repertoire. With activities transcending fields of action, capacity for systems transformation is more likely to be sustained outside of the standard protest cycle, and success is more likely to be measured not in how the symptomatic fix was won, but in how the wider social movement field is provided with the awareness and capacity to transform the system (Useem & Goldstone, 2022).

## **Educate\***

### *Aim*

In this phase, the purpose is to provide informational resources to mobilized constituents in a way that is accessible can be engaged with by those external to the movement's network of organizations. Educating is not about convincing — it is about providing those who are on the ground and in their community with the resources that they need to run effective campaigns and support the identities and values of those that they work with. Education is not convincing — it is meeting the needs of those who have been engaged and giving space for collaboration and further dialogue. This space should ultimately contribute to a belief that transformational change is possible. Supporting avenues for a “coming to consciousness” as discussed in the section “Consciousness & Impact” is a primary goal.

### *Tactical Approach*

Providing organizations and individuals within the social movement network with the resources to form new opportunities for their participants while actively contributing to innovation in the tactics used across the movement is going to be critical, especially when the excitement of the initial catalyzing action wanes and the recently mobilized are once again asking “What now?” By establishing opportunities for information sharing such as newsletters, a strong web presence, regular webinars, and material development that can be adjusted and shared with new audiences to help answer exactly what can be done within the time, financial, and human resources present in each organization may help to keep the momentum going in the down times.

### *Organizing in Systems*

At the core of transformational systems change is the act of learning at the individual and organizational level and the ability to transfer this learning to new areas of application for evolution in the movement (Ferraro et al., 2015; Jacobs, 2016; Senge et al., 2015). By providing the resources and the opportunities for organizations, new to the movement, or interested in identifying new ways to advance their own work through the shared expertise and lived experience of those already in the network of the backbone organization, creates stronger partnerships and well-informed participants in the on-the-ground settings during the engagement phase of the cycle as well as in the moments when attention has faded and there is more capacity for knowledge transference. Spinoza et al. (1995) assert education as an important part of establishing new markets for the advancement of social movements

through their entrepreneurial lens on social action (p.7).

\*Interlude: These phases may happen in tandem or in a smaller cycle, as more engagement likely will require a revisit with empathizing and more empathizing may require education for constituents mobilized already who may be uncomfortable with new identities entering the action field who they had not typically engaged with in the past. These three phases are important for the final phase to contribute to closing the loop and contributing to the overall future vision in a way that supports growth in a movement.

## **Evolve**

### *Aim*

In this phase the goal is collect the information that has been harnessed in the previous three phases and test it against the narrative and the future state that was established under the Envision phase. It is likely that this future state will have to grow to encompass and resonate with the new identities that have come under the umbrella of the movement in question. Evolving will likely result in a change of measurement and metric frameworks for the movement, but it can also mean that more resources and collaboration spaces open and new communities and organizations can be engaged with.

### *Tactical Approach*

Narrative development is critical here once again. The backbone organization must take the lessons learned from their interactions along the protest cycle and integrate them into the stories they tell to continue to recruit and support allied organizations through times of lower public support and interest. This will help to provide context for the activities that have preceded this moment and set the stage for activities that will arise through the ebbs and flows of the movement cycle prior to the next catalyzing event. Getting local and continuing to provide educational resources within and across the networks is critical to sustaining the movement and nurturing its next iteration.

### *The Systems Approach*

In systems thinking, the tactics and interventions taken to change a system must be supported with processes for evaluation and reporting back to the network and to the general public. This process allows for feedback on failure and learning opportunities to be baked in to the process of social change so that significant negative impacts can be mitigated as actors intervene. There is no “wait and see” in

systems thinking or in social movements. By their very nature, experimentation must be used to test new ideas, evolve, and innovate to capitalize on momentum and influence long-term change.

## **In Summary**

As mentioned previously, this framework is not meant to be linear in nature, but iterative, encouraging innovation through dialogue and collaboration with those who have been mobilized and those who can be mobilized.

The backbone organization sits at the centre as the coordinating entity within the movement. They set the stage by envisioning or understanding what the movement that they wish to see flourish aims to accomplish. This narrative forms but must be tested through the empathize phase with a larger coalition.

The coalition will work with the vision to engage and educate the broader landscape of networked organizations who see themselves as contributing to the larger movement. A cycle of education, engagement, and empathy must form which then contributes to the evolution of the movement through involvement of new organizations, actors, and tactical approaches. As the movement evolves, so must the narrative for the future state to include lessons learned and expand inclusion for new identities. The cycle does not so much repeat itself as create new opportunities to act and build capacity in awareness and activity towards true transformational change.

## Experimenting with the Future

At the core of the social movement and the E5 Framework proposed here is the idea that experimentation, innovation, and collaboration are necessary for testing the possibilities for a desired future. Deep work is required within social movements and their organizations to support this visioning and to depart from the futures that are handed to us in our day-to-day lives as unchangeable, as known, as predictable – a decolonizing of the future (Inayatullah, 1998). In their Major Research Project, Karli Ferriolo (2019) presented the strong connections between foresight practices and social movement organizing. What I hope I presented here is the importance of taking these insights and acting on them.

This can be best achieved by framing the implementation of this framework and its outlined activities as experiments (Waddock et al, 2022), drawing from the lessons learned and the shared tactics of a growing network to be applied. Being willing to pivot, test, re-test, and provide new insight in an ongoing collaborative effort for change is crucial to long-term success. Social movements, by their very essence, transcend the knowing-doing gap (Scharmer, Pomeroy, 2019) and the framework proposed will hopefully support activities that engage with fact and knowledge, but push organizations to follow up with continuous action and a process that supports learning and innovation.

This action must transcend a fear of failure or the celebrations of symptomatic solutions. Instead, opportunity for success must be measured by “how the movement and its interaction with targets and other groups has changed the wider social movement field in which the movement has acted” (Useem & Goldstone, 2022) and how the desired future has been brought closer to fruition. As Masini (2006) insists, “our future must not only be foreseen and dreamt of, but also chosen and built” (p. 1159) in ways that are inclusive and provide space for all identities, hopes, and needs to be fulfilled without being reduced simply to fantasy.

It is worth acknowledging here that a system will always allow for small waves of disturbance – after all, peaceful protest is baked into the laws of most democratic societies. These systems may flinch, stop, and restart when faced with an unexpected swell, but what active experimentation, innovation, education, and collaboration do is build towards bigger waves that can eventually topple these strong, seemingly immovable structures.

The purpose of this framework is to suggest that through capacity building in times of quiet waves or an unexpected swell, perhaps social movements and organizations can build something that can be ridden by more people, into a sustainable and flourishing future for all.

# **Limitations to this Research Project**

## **Lived Experience**

There are limitations to this research project which provide space for interested academics and social change makers to elaborate on, improve, and experiment with. The work is largely informed by retrospective case studies, literature review, and expert reflection, rather than robust lived experience of social movement participants and organizers. I did not conduct field observation or collect data from on-the-ground organizers, focusing instead on developing a systemic strategy for social change organizing, validated by experienced organizers and systems thinkers.

## **Limited Sample**

While more system change makers could have been conducted, the concepts represented by the very different systems change makers and the case studies presented were already showing common patterns between them.

## **Western Democratic Process**

The sources and movements analyzed and compiled as a part of this research project are based in Western democratic countries and political processes. As a result, the produced content may not be applicable in settings outside of these contexts and there is opportunity to grow this body of work and understanding to suit the movements and organizers who do not operate within these spaces.

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