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Portfolio Design Stencils: A conceptual, learning and action architecture for accelerating social systems transformation

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Social systems need new conceptual, learning and action architectures to enact strategy, change theories, transformation and impact programs in the face of escalating systemic complexity and cascading uncertainty. Instruments to manage emergent implications, discover new pathways and solutions, generate actionable intelligence and inform decision-making and commitment of resources to transformation over and in time.

CHÔRA has developed a new framework, practice and toolkit for system transformation: *Portfolio Design Stencils*. The output of a stencil is a portfolio of strategic innovation and system transformation options that are activated to help social systems learn their way into change. Each portfolio is intent-led, structured, distributed, place-based, participatory, and dynamically manages a distributed range of interventions that support sustained and collaborative strategic learning, action and decision-making. The stencil provides strategic and systemic designers with generative and evolutionary metamodels, processes and tools to: engage with complex problems; coherently design, manage and learn from problem-solving actions over time; and accelerate impact in the social systems in which they operate.

¹ <https://www.chora.foundation/>

The presentation will outline the methodology and provide cases of in-field applications of portfolio stencils to address complex, multifaceted, and multi-stakeholder issues such as urban transformation and sustainable tourism with government and development agencies.

KEYWORDS: system transformation, strategic design, portfolios of strategic innovation options, complexity, uncertainty, organisational learning, system meta models, visualisation, visuospatial reasoning, urban transformation

RSD TOPIC(S): Methods & Methodology

Presentation context

Designing strategic actions in complexity and uncertainty

The performance and resilience of human systems depend on their intent to change and an embodied capability to design actions, learn and take timely decisions about themselves. Who the system is, i.e. the fabric of experiences, resources and narratives that make it the way it is, and where its presence occurs, i.e. the nature and dynamics of its context, are conditions of the forms our actions can take. Woven into this context is uncertainty—the impossibility for us to discern, draw connections, give them significance, and thus represent to ourselves the possibility of an action, project and measure its outcomes, and judge its value. Effecting positive change within a human system requires a process of designing actions and their decision-making implications in a way that requires us to engage substantively with complexity and uncertainty (cf. CHÔRA, 2020).

To do so effectively requires:

- A socialised sense of self, of the resources a system disposes, of the intent it carries and effects it wishes to induce

- Relevant heuristic representations of the object of action as a space of learning and impact
- Constant generation of a dynamically managed budget of possibilities (Bateson, 1972)
- Design instruments accelerating engagement with our action space and multiplying impact

Architecture and elements of a portfolio design stencil

The portfolio design stencil is a genomic and generative ontology. It provides initial terms of reference for an intent-led, structured, distributed, place-based, socialised, evolutionary process that engages, impacts, and changes human systems, their contexts, and the relationship between them. The Stencil contains a simple, intuitive conceptual ontology and a ready-made set of references, processes and tools for quick deployment. Its formal integrative arrangement ensures that its effects are immediate and that as they occur, they cause, in any given situation, a transition from a state of concern and query to one of activation and enactment (Weick, 1988).

The functional role of a portfolio design stencil is to rapidly and purposefully generate a learning space containing coordinates for the design and deployment of a portfolio of strategic innovation or system transformation options. The stencil helps solve the problem of “where” in the system to locate the elements of a portfolio and “what” needs design, activation and dynamic management for change to happen. It is a heuristic device that addresses the complexity and related uncertainty of human social systems to learn about it and resolve it pragmatically.

A portfolio design stencil has three elements which are shaped by a strategic rationale and give shape to a portfolio:

1. **Social systems canvas:** spatial representation of the main features of a system that makes it possible to grasp the system ontology and situate experiences and forms of engagement;
2. **Areas of interest:** recognition and naming of where relevant, meaningful experiences are happening, where a system responds to needs and intent,

where resources are engaged and transformed, and where meaning structures establish social narratives;

3. **Positions:** places that create the possibility of interaction with the system and where stakeholders could observe and experience relevant system dynamics.

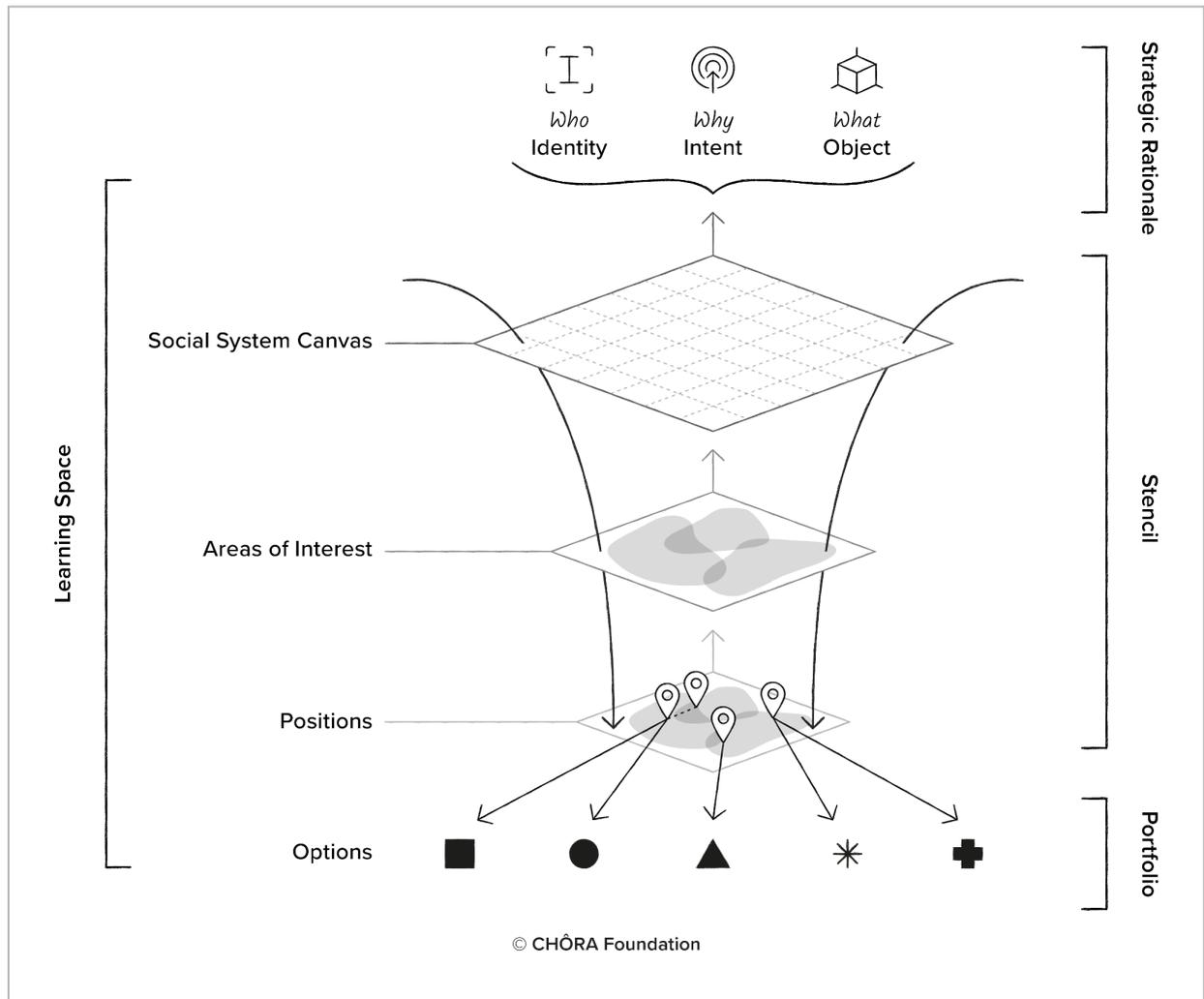


Figure 1: Portfolio stencil funnel. Developed by CHÔRA Foundation, 2022.

Process and outputs of a portfolio design stencil

Portfolios of strategic innovation options

The stencil is deployed through a series of strategic conversations and generative workshops with key stakeholders from the social system (organisation, community, institution, sector etc.). The process is analogous to the design, production and use of any stencil-like instrument, offering a range of applications from fully rendered and ready for instant activation to open and drawing on a deeper situated and participative strategic reflection.

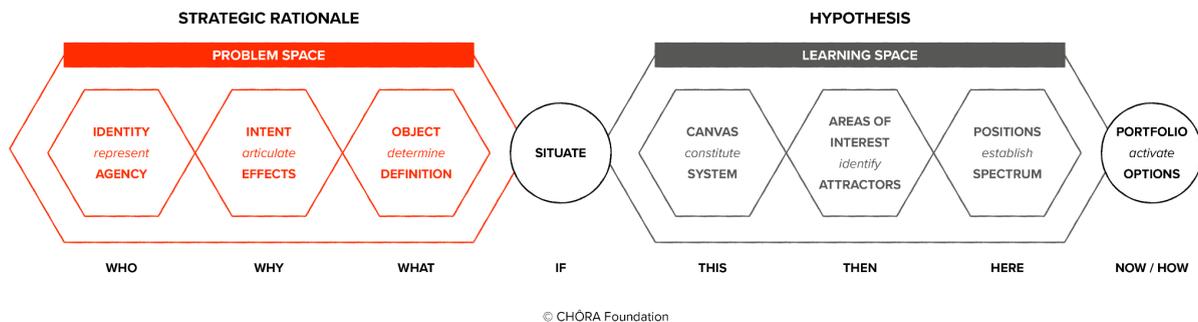


Figure 2: Portfolio stencil process. Developed by CHÔRA Foundation, 2022.

Deployment occurs in two phases:

1. **Strategic rationale (problem space):** a series of strategic conversations designed to explore and articulate the identity, who, and transformation intent why of the social system and the object that they are seeking to transform. This generates and attracts relevant knowledge about the system and context where the portfolio will be situated.
2. **Hypothesis (learning space):** a co-generative design process. CHÔRA's system transformation canvas is used to render the social system or object (what) spatially; identify and show areas of interest; and locate and show selected positions in the system that will induce experiential outcomes with respect to the transformation intents and effects being sought.

The output of this process is a distributed range of strategic innovation and system transformation options. Options are vehicles and engagement models for learning experiences within the system that will generate new knowledge, relationships, capabilities and models for system transformation. A portfolio of options is activated to engage with the learning space and dynamically managed to generate actionable intelligence to inform portfolio evolution and decision-making in support of the transformation intent.

In-field application of portfolio stencils

CHÔRA is actively partnering with development organisations and stakeholders to apply the portfolio design stencil to a diverse range of system transformation efforts. For example, CHÔRA has applied a city portfolio design stencil in its work as a partner under The Mayors for Economic Growth² and City Experiment Fund,³ joint EU and UNDP initiatives to support cities, mayors, and their teams to make sense of and address complex issues playing out in the eastern partnership region. Several seed portfolios have been designed and activated for cities involved in this program. The approach enhanced a new understanding of key dynamics of identified urban problems and supported the generation of a network of local and international stakeholders that was leveraged to create and deploy systemic urban transformation interventions in the cities. The practical application of these instruments in different sectors, in different social systems, and with different stakeholders will allow us to further refine this as a distinctive and robust approach to systemic design.

² <https://eum4eg.com/>

³ <https://innovation.eurasia.undp.org/city-experiment-fund/>

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