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Leading Social Transformations: Creating Public Value and Advancing the Common Good

John M. Bryson [a], Bill Barberg[b], Barbara C. Crosby[a] and Michael Quinn Patton [c]

aHubert H. Humphrey School of Public Affairs, University of Minnesota, Minneapolis, MN, USA; bInsight Formation, Inc., Golden Valley, MN, USA; cUtilization-Focused Evaluation, Pine City, MN, USA

ABSTRACT

This essay explores what is involved in leading a social transformation to create public value and advance the common good. The contrast here is with strategic leadership of organizations, collaborations, and social movements. Leading a *social transformation* is *much bigger*. The required changes are multi-issue, multi-level, multi-organizational, and cross-sectoral, and can cross national frontiers. Deep and broad changes, often involving radical innovations, are needed. Deep and abiding changes in relationships – and power relationships – among people and groups are required. Leadership of organizations, collaborations, and social movements is still important for transformation, but not enough. Instead, advancing social transformation requires leadership that is deeply relational, visionary, political, adaptive, and comfortable with complexity.

MAD statement

If one views leadership as a response to challenges, leading social transformation is a crucial element needed to address the most significant challenges – the 'grand challenges' – the world faces. For example, transformations (and their opposition) are underway in terms of how much of the world approaches climate change and inequality. The leadership involved in each case has been multi-issue, multi-level, multi-organizational, and cross-sectoral, as well as multi-generational, multi-ethic, and multi-gendered. The essay explores what seems to be involved in successful societal transformation – in conjunction with strategic leadership of organizations and leading collaborations, coalition building, and advocacy.

Introduction

Leading a social transformation to create public value and advance the common good is a far bigger and more challenging enterprise than strategic leadership of a single organization, collaboration, or social movement – and is what the grand challenges of our time requires. Ultimately, it requires a substantial change in collective consciousness by a society. For example, consider the shift in attitudes, beliefs, and values that underpinned the abolition of apartheid in South Africa; the extension of the rights of women,

minorities, and LBGTQI people in the US; and the substantial global mind shift underway regarding the need to address climate change and issues of inequality. As with organizational and inter-organizational change management, the aspirations of the social transformation agents, their capabilities, and the strategies needed to link aspirations and capabilities still matter greatly, but the nature of leadership changes dramatically.

Strategic leadership of a single organization involves a fairly well-known set of tasks and often involves the development of a strategic management system to ensure direction, alignment, and commitment across the organization (Drath et al., 2008). Strategic leadership of collaborations and social movements, though less studied, is becoming more common and necessary, given the boundary-crossing challenges we all face. Leading multiple organizations to achieve a common purpose is what we call *leading strategy management-at-scale*, meaning the scale of the challenge to be addressed. Such cross-boundary issues include the global COVID-19 pandemic, or US domestic issues like homelessness, the lack of affordable housing, racial gaps in educational achievement, or the damage from adverse childhood experiences. Such issues occur within a shared-power, no-one-wholly-in-charge environment and demand a response from multiple organizations. Multiple strands of reasonably aligned if not directly coordinated effort are required, but those efforts, while often framed as 'transformational' are not, in the sense that by themselves they typically do not fundamentally alter systems or significantly alter relationships – including power relationships – among people. We discuss two complementary approaches to strategy management-at-scale: collaboration, and especially the popular collective impact (CI) approach; and community organizing, coalition building, and advocacy.

Leading social transformation takes the change challenges and responses to a societal or even global level. The required changes are multi-issue, multi-level, multi-organizational, and cross-sectoral, and can cross national frontiers. Deep and broad changes, often involving radical innovations, are needed in education, politics, the economy, organizations, media, attitudes and beliefs, and other areas. Deep and abiding changes in relationships – and power relationships – among people and groups are required. This goes well beyond single organizations, collaborations, and typical social movements. In short, social transformation involves many, many initiatives loosely coordinated or co-aligned – all at least implicitly guided by shared principles and aiming towards common purposes. Numerous complementary theories of change are at work – both in support of the changes and, not surprisingly, in opposition to them. If one thinks of leadership as a response to challenges, leading social transformation is a key element in addressing the most significant challenges – the 'grand challenges' – the world faces, such as climate change and abiding inequality. The essay will explore what seems to be involved in successful efforts aimed at societal transformation and how leadership can help move them along.

Throughout the paper, we attend to the importance of public values and the common good. The public value literature draws attention to questions about: (1) the public purposes that are, or should be, served by organizations in all sectors, by intra- and cross-sector collaborations, and by public leadership broadly defined; and (2) how public managers and other leaders do and should accomplish these purposes (Bozeman & Johnson, 2015; Bryson et al., 2020; Bryson et al., 2015; Moore, 1995). To that end, we concentrate mostly on government and nonprofit organizations, while fully recognizing the far

broader extent of the public sphere, including social movements and the public consequences of so-called private organizations' actions (Bryson et al., 2015; Crosby & Bryson, 2005, 2010).

In this essay, we are guided by the leadership ontology proposed by Wilfred Drath and his colleagues, in which they assert that leadership is about achieving direction, alignment, and commitment (DAC) (Drath et al., 2008). These authors argue that the new DAC ontology – which contrasts with the predominant leader-follower ontology – is necessary when the context shifts beyond single organizations to include collaborations and social movements, or we would argue, social transformations. This also means that in terms of Rost's (1993, pp. 3–4) typology of leadership theories, we are describing throughout what we believe to be the 'essential nature of leadership' (direction, alignment, and commitment), but that the 'peripheral elements' (personality characteristics, facilitation, style, goal attainment, effectiveness, contingencies, etc.) change as the context changes, and that the 'content' of what leaders need to know about also changes as the substantive focus of the change effort changes.

After this introduction, the article proceeds in the following sections. First, we review what the strategic leadership of organizations, collaborations, and social movements normally entails for public and nonprofit organizations. This review is in two main parts. In the first, we briefly discuss the strategic leadership of organizations. This is followed by a more extensive review of the developing literature on what we call strategy management-at-scale, which focuses on addressing cross-organizational problems where substantial collaboration and co-alignment are required. Two complementary approaches are discussed, beginning with collective impact (CI) projects. CI efforts are typically focused more at the programmatic level and do not involve significant changes in policy or power relationships. In contrast, community organizing, coalition building and advocacy efforts typically do aim to alter policy and power relationships, and can therefore provide direct support for social transformation. Second, we illustrate leading strategy management-at-scale with an example from Canada involving reforming the family justice system. Third, we spend considerable time examining the nature of social transformation and offer several ideas concerning what leadership for social transformation involves. We illustrate this section with a lengthy discussion of a social transformation effort aimed at changing the way food is produced and consumed on a global scale. Finally, we offer conclusions aimed at advancing the theory and practice of leadership for social transformation.

Strategic Leadership of Organizations, Collaborations, and Social Movements

Strategic leadership of organizations, collaborations, and social movements in all cases involves direction, alignment, and commitment, but it takes a different form in each context. We address each context in turn.

Strategic Leadership of Organizations

Strategic leadership of single organizations has received a great deal of attention. Development of a strategic management system of some sort is typically necessary to ensure direction, alignment, and commitment across an organization (e.g. Bryson, 2018;

Whittington et al., 2019). Strategic management 'integrates strategic planning and implementation across an organization (or other entity) in an ongoing way to enhance the fulfilment, the meeting of mandates, and sustained creation of public value' (Bryson, 2018, p. 24).

Strategic management is now a conventional (if often rudimentary) feature of government, nonprofit, and business organizations. Meta-analyses show that strategic planning is generally effective (George et al., 2019). Meta-analyses of the effectiveness of strategic management systems in governments, nonprofit organizations, and businesses are in short supply, but there is reason to believe such systems can support effective leadership, especially when leaders are actively interested in behaving proactively (e.g. Andrews et al., 2012; Crook et al., 2008; Marr & Creelman, 2011; Mintzberg et al., 2009; Whittington et al., 2019). On the other hand, when these systems – and their leaders – are out of alignment with the organization's challenges, needed change can be stifled and public value creation reduced.

Leading Strategy Management-at-Scale

Many challenges go beyond what an organization's strategic management system can handle by itself, including those we mentioned earlier: the global COVID-19 pandemic, and US domestic issues like homelessness, the lack of affordable housing, racial gaps in educational achievement, and the damage from adverse childhood experiences. Making headway against such challenges requires reasonable collaboration among, or at least alignment of, the efforts of multiple organizations, associations, and groups in an approach involving sharing power, pooling authority, and aligning resources and purposes around achieving a shared objective. Multiple strands of reasonably aligned if not directly coordinated effort are necessary, often across sectors and levels, e.g. global, federal, state, and/or local.

In this section, we discuss two different, yet often complementary, approaches to leading strategy management-at-scale: collaboration, and especially a popular approach called collective impact (CI); and community organizing, coalition building, and advocacy. Both approaches have extensive histories, though often with disappointing results. For example – in contrast to the hype surrounding it – collaboration is *not* an easy answer to hard problems, but instead is a hard answer to hard problems. When it comes to collaboration, there are more ways to fail than to succeed (Bryson et al., 2015). The same is true of community organizing, coalition building, and advocacy (e.g. Almeida, 2019; Sabatier & Weible, 2014; 't Hart & Tummers, 2019).

Collective impact. Leading strategy management-at-scale initiatives gained added attention and stimulus with the publication of a now widely cited article by John Kania and Mark Kramer with a catchy title, 'Collective Impact', in a 2011 issue of the *Stanford Social Innovation Review*. The authors asserted that achieving CI required a disciplined cross-organizational and cross-sector approach on a scale that matches the challenge. They argued that 'five conditions' were necessary to achieve collective impact (pp. 39–40): a common agenda, shared measurement system, mutually reinforcing activities, frequent and structured communications, and a 'backbone organization'.

The CI framework found a ready audience among foundations, government agencies, health systems, and other actors who were looking for a conceptually simple way to talk

about and create large-scale change through multi-sector collaboration. The CI approach fit the bill and was in reasonable accord with more sophisticated and detailed research-based frameworks (Ansell & Gash, 2008; Bryson et al., 2015; Emerson & Nabatchi, 2015; Wolff et al., 2016).

Partly in response to strong criticisms, CI advocates have modified and elaborated the approach since 2011. One change involves articulating several 'preconditions' for CI, including having an influential champion, or a small group of champions; adequate financial resources; and a shared sense of urgency around the need for change (Hanley-brown et al., 2012). Other changes included: clarifying that the 'five conditions' are really principles to guide the development of a CI effort, articulating development phases, highlighting the need to attend to equity and justice, and elaborating on 'mindset shifts' needed to achieve impact (e.g. Hanleybrown et al., 2012; Kania et al., 2014; Kania & Kramer, 2013). These mindset shifts – which for purposes of this essay, count as leadership tasks – include (Kania et al., 2014, pp. 2–5):

- 'Getting all the right eyes on the problem'
- 'Understanding that the relational is as important as the rational'
- '[Understanding] structure is as important as strategy'
- 'Sharing credit is as important as taking credit'
- 'Paying attention to adaptive work, not just technical solutions'
- 'Looking for silver buckshot instead of the silver bullet'

Yet another change is that the concept of a 'backbone organization' evolved to be 'backbone support'. This came about because the level of influence and prestige (and potentially control over funding) that was associated with having a backbone organization led to competition in communities over who would be the backbone organization – and sometimes resulted in competing coalitions that were each trying to pull in key community organizations to support their efforts. The idea of backbone support means that different organizations may take on parts of the backbone support roles that align with their strengths. When looking at large-scale change, a vision for distributed backbone support is far more practical than expecting a single organization (new or existing) to provide what is needed to advance many mutually reinforcing activities to make meaningful progress toward advancing the common agenda.

As noted, the CI approach has received a number of critiques, with the most serious asserting that CI initiatives have great difficulty achieving deep-seated system change, equity, and justice (e.g. Christens & Inzeo, 2015; Wolff et al., 2016). Stachowiak and Gase (2018) have studied the eight CI initiatives (out of an initial sample of 25) they thought most 'demonstrated strong implementation of the CI approach and had documented meaningful changes among the target population' (p. 2). The authors found that 'more complete implementation of the conditions results in greater impact' (p. 3). In addition, when initiatives focused on equity, 'there was evidence of positive outcomes' (p. 5). There was also some evidence of system change in this sample of success stories, but, as might be expected, change took a long time, and it does not sound like most changes were of the deep-seated kind envisioned by social transformation. Using process tracing, the authors concluded that backbone support, including continuous communication, and a common agenda, are important starting points. The two together

help produce mutually reinforcing activities. The common agenda and mutually reinforcing activities then contribute toward developing a shared measurement system. One takeaway from this evaluation is that while the need might be great, the normal expectation ought to be that meeting the conditions for successful CI is very difficult.

The CI literature is relatively silent on leadership tasks, except for those implicit in the mindset shifts noted above. More recently, Senge et al. (2015), in a widely cited article, argue that three core capabilities that 'system leaders' need in order to foster collective leadership are: the ability to see the larger system, fostering reflection and generative conversations, and the ability to shift the collective focus from reactive problem solving to co-creating the future. In addition, Dubow et al. (2018) implicitly point to leadership tasks with their finding that backbone organizations help foster change when they: promote regular convening, stress accountability, promote public visibility of efforts, have top-leader involvement, and engage in coaching.

Community organizing, coalition building, and advocacy. The critiques of CI draw limits around the situations in which it is likely to be helpful. Specifically, really addressing issues of equity, social justice, and system change requires community organizing, coalition building, and advocacy (Almeida, 2019; Wolff et al., 2016). A revision of the CI framework called 'Collective Impact 3.0' acknowledges this, but doesn't go far enough (Cabaj & Weaver, 2016). As originally formulated, CI is a fairly top-down, 'grass tops' approach that does not engage the most affected communities as equal partners, nor does it get at the deep political, economic, and racial causes of serious social problems. Wolff et al. (2016) argue that to get at issues of equity and justice (as key public values) requires initiatives built on the following six principles:

- Explicitly address issues of social and economic injustice and structural racism
- Employ a community development approach in which local residents have equal power in determining the coalition's or collaborative's agenda and resource allocations
- Employ 'grass roots' community organizing as an intentional strategy and as part of the process; work to build local leadership and power; and change the power structure when necessary
- Focus on policy, systems, and structural change ('Policy offers the most direct route to measurable progress, but all too often CI practice stops at the programmatic level', p. 46)
- Build on the extensive community-engaged scholarship over the last four decades that shows what works, that acknowledges the complexities, and that evaluates appropriately (e.g. Christens & Inzeo, 2015)
- Construct core functions for the collaborative based on equity and justice, including providing basic facilitating structures and building member ownership and leadership As Wolff et al., 2016, p. 49) note, 'The key role for the collaborative needs to be *building* the community leadership as opposed to *being* the leadership (italics in original)'.

These principles foster creating a *social movement* that alters power relations so that major system changes can happen. The shift also involves: recognizing that powerful opposition is to be expected; a power analysis is necessary; effective engagement, mobilization, and advocacy efforts are required; and entrenched power must often be confronted and neutralized or overcome, if deep-seated system change is to occur. The

required leadership tasks are in many ways similar to those for CI, but there is more emphasis on: grass-roots organizing, systems thinking (Stroh, 2015), political astuteness (Harley et al., 2015), coalition building, and advocacy (Jenkins-Smith et al., 2017; Almeida, 2019), and a willingness to engage in conflict (Christens & Inzeo, 2015). Strategy mapping (Barberg, 2017; Bryson et al., 2014) and power mapping (e.g., Ackermann & Eden, 2011) can be particularly helpful.

Community organizing, coalition building, and advocacy also have their limits. The focus on bottom-up organizing and overcoming entrenched power means that – as with CI efforts – there are more ways to fail than to succeed. The focus on 'the community' also generally limits the reach of the approach to more local concerns, although grass-roots mobilizing initiatives have also helped change many specific policies at U.S. state and federal levels, including smoking limits, gun safety legislation, easing or strengthening abortion rights, changes to suffrage, and civil rights legislation. In other words, networks of community organizing efforts across geographically dispersed communities can have a substantial impact, such as the multi-city, multi-state efforts of the national US organization Faith in Action, which is a coalition of coalitions of religious congregations and their allies.

CI initiatives and community organizing efforts of course can be mutually reinforcing. System changes that require better alignment and inter-organizational service coordination may be achieved relatively quickly using a CI approach. When 'changes require concessions from entrenched interests, or reorganization and reorientation of existing institutions', community organizing, coalition building, and advocacy are 'likely the more effective approach' (Christens & Inzeo, 2015, p. 431.) When both kinds of changes are needed, the two approaches can be complementary.

An Example: Reforming the Family Justice System in Alberta and British Columbia, Canada

An innovative collaborative effort is underway in western Canada aimed at fundamentally changing the family justice system. The changes involve better alignment and coordination of existing services, but also major reorientations and reorganizations of system elements. The example thus involves collaboration within and between the two provinces (i.e. a collaboration of collaborations), community organizing, coalition building and advocacy. The Alberta initiative, begun in 2013, is called 'Reforming the Family Justice System' (RFJS) (RFJS, 2020). The British Columbia (BC) initiative is called 'Transforming the Family Justice System Collaborative'. The BC initiative is based on a commitment, in October 2019, of a network of justice-sector organizations called Access to Justice BC to promote family well-being through the family justice system (https://accesstojusticebc.ca/family-justice-collaborative/). The two initiatives began working together in December 2019.

The initiatives' purpose is to shift the family justice system from an adversarial system to one with a focus on family well-being and is based brain science advances and especially on the compelling scientific evidence concerning the negative impact of Adverse Childhood Experiences (ACEs) and trauma on brain development. This involves major shifts in both the mental models and the practices that have become deeply embedded in the current family justice system. Specifically, the move is *away from* judicial

system involvement, except where absolutely necessary, and *toward* supporting families in manifold ways, meaning the efforts necessarily move beyond the justice system-as-is, across government levels, and across sectors.

Interactive strategy mapping. The example also involves what we think is one of the most important technological and process innovations for leading strategy management-at-scale: interactive strategy mapping with 'zoomable' strategy maps (Barberg, 2017). These software-based maps operate much like Google maps in that it is possible for all collaborators to zoom in and out from high-level strategic objectives down to more detailed strategy elements. The maps help with managing the complexity of the changes needed at this scale. They also act as a way of tracking and monitoring progress. The maps can easily be changed as circumstances change.

Change at this scale is unlikely to be led by a single backbone organization. Instead, what is needed is guidance for all the involved parties about how they can work in a collaborative or just co-aligned way toward shared purposes. Shared strategy maps thus help improve the efficiency and effectiveness of the collaboration by capturing and representing graphically a generally agreed upon, broad strategic framework (common agenda) and, to the extent practical, shared measures, mutually reinforcing activities and continuous communication. The use of strategy maps makes the rest of the conditions of CI more practical for large scale system change.

In December of 2019, the Alberta and BC collective impact initiatives began working together to develop a strategy map for transforming the family justice system by focusing on achieving family well-being – rather than the current adversarial system that contributes to toxic stress and long-term damage to all the family members – especially the children. The Alberta and British Columbia coalitions were part of the nine coalitions across Canada and the US that spent several months working on different parts of a comprehensive strategy map template aimed at addressing ACEs that is now available through a free, on-line repository built on the same technology platform like Wikipedia. The repository is called the ACEs and Resilience Resource Commons for Communities (ARRCC) (http://ifi-wikis.com/arrcc/Main_Page). The ACEs research helps provide the vision of family well-being and principles to guide the efforts to enhance family well-being.

The map starts with the high-level strategy map that organizes the many areas where more detailed strategies for transformation are needed; see Figure 1. This high-level strategy map helps organize the big picture with high-level objectives like 'Increase Babies Born Healthy in Nurturing Homes' or 'Improve the Child Welfare System' (including transformation of the foster care system and improvements to the adoption system). The family justice system, as discussed in the next paragraph, is a fairly small part of the overall map and system, or system of systems.
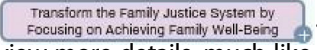
In the lower right of Figure 1, one of the strategy objectives is . The '+' in the lower right corner enables 'zooming in' to view more details, much like one might zoom in on an online map of the United States to look at specific streets and addresses in Minneapolis, Minnesota. In this case, the zoom map focuses on the CI strategy for Transforming the Family Justice System (see Figure 2).

Figure 2 shows a map with four objectives in the first column, that focus on intentionally bringing about the shifts in attitudes, beliefs and understanding that are so important
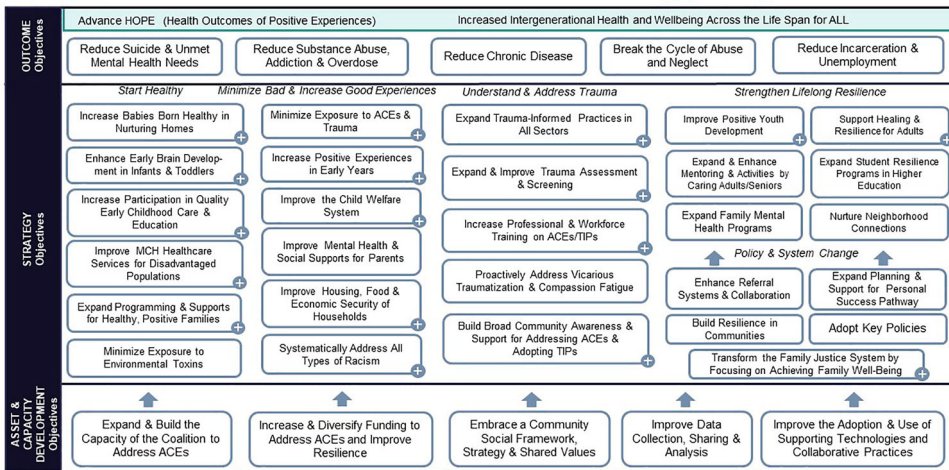
Figure 1. Adverse childhood experiences and resilience to advance HOPE and increased intergenerational health and well-being across the life span for ALL. Source: The ACEs and Resilience Resource Commons for Communities (ARRCC) template developed by Bill Barberg, and InsightFormation, Inc. September 2020. Downloaded from: www.insightformation.com/ARRCC.

when trying to accomplish a significant transformation of an established system like the family justice system. By including clearly defined objectives to achieve the desired shift in mental models, the Alberta and British Columbia collaborations are in a stronger position to align, support and create efforts to make that change a reality.
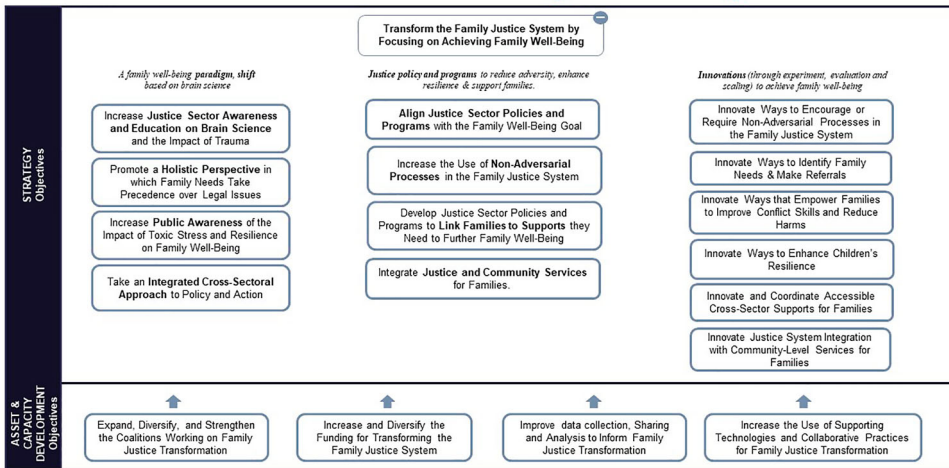
Figure 2. Transform the family justice system by focusing on achieving family well-being. Source: The ACEs and Resilience Resource Commons for Communities (ARRCC) template developed by Bill Barberg, and InsightFormation, Inc. September 2020. Downloaded from: www.insightformation.com/ARRCC.

In this strategy map, the second column of objectives focuses on more concrete policy and programme changes to the system based on the shift in mental models. Since this effort at system change is going into uncharted territory, the third column of objectives recognizes the need for innovations in areas that parallel the second column's objectives. These innovations require scaling and ultimate incorporation into what would then be a highly changed mainstream regime. By including these objectives in the strategy map, there is now a structure around which to organize information, actions, research and toolkits that can help to accelerate, refine and spread those innovations.

From-to diagrams. The zoomed-in strategy map is a foundational structure that can allow additional information, measures and actions to be developed, shared and implemented. Development of this kind of information can be aided by creation of 'From-To Gap Diagrams'. Clear descriptions of these gaps help to organize the current and priority new actions so that progress on building the capacity of the coalition can be made more effectively, and can be communicated clearly to the community, decision makers, funders, and other stakeholders. For example, in the details for the objective to 'Increase the Use of Non-Adversarial Processes in the Family Justice System', a next level of detail clarifies examples of what that might involve in the form of a 'From-To Gap', as shown in Table 1. The more that these types of details can be clearly described and broadly communicated, the more likely that different stakeholders will be able to move forward on actions to close those gaps and accomplish the objectives.

Table 1. From collecting evidence for adversarial use to supporting family well-being.

From: (Current state)	To: (Desired state)
A model where the purpose of exploring the history of the family is to collect evidence for court or negotiations	A model where the purpose of exploring history is to support family members and to develop family well-being within their situation (with better understanding to support healing and approaches that take past trauma into consideration)

The bottom layer of the strategy map includes the objectives that the coalition will work on to build its capacity to accomplish the objectives in the above section. For example, one of those objectives is to 'Expand, Diversify, and Strengthen the Coalitions Working on Family Justice Transformation'. The underlying detail for that objective includes the following From-To Gaps shown in Table 2.

Table 2. Moving to expand, diversify, and strengthen coalitions working on family justice transformation.

From: (Current state)	To: (Desired state)
Even though indigenous populations are disproportionally harmed by the current family justice system, they are not significantly represented in the coalition working to transform the system	Indigenous communities are full partners in the coalition work to transform the family justice system, bringing Indigenous perspectives to understanding both the current and desired future state and active Indigenous participation in achieving the outcome objectives
Coalition participants do not understand the need for system-level change or have the capacity to make system change happen	Coalition participants have accepted the need for system thinking, culture change and strategy management and support the use of approaches and tools that enhance the coalition's capacity for system transformation
The coalition primarily consists of people from the justice sector	There is extensive cross-sectoral and community involvement in the planning and activities to transform the family justice system

The Alberta and BC initiatives are at different stages; joint collaboration when appropriate should speed the effectiveness of each one and continuing advance in the two provinces can be expanded to inform and enrich further changes across all of Canada.

Leadership of Social Transformation

Social transformation takes the magnitude of changes imagined by CI and community organizing a dramatic step further – out, down and up. *Out* means changes well beyond the boundaries of any collaboration; *down* means deep-seated systemic changes; and *up* means up to higher more encompassing levels, such as state, national, or global levels. Transformation involves major changes to systems and explicitly addresses power relations. Patton (2020, p. 157) points to the following transformations as offering lessons for leading and managing change: the end of colonialism, the end of apartheid, the fall of the Berlin Wall and communism, turning back the AIDS epidemic, the Internet, and the rise of social media. He notes that none of these transformations occurred due to a centrally conceptualized, controlled, and implemented strategic plan or massive coordinated initiative. They occurred when multiple and diverse initiatives – that typically included various social, political, and technological innovations – intersected and synergized to create momentum, critical mass, and ultimately, tipping points.

Figure 3 helps illustrate graphically how transformation happens. The x-axis shows changes through time. The y-axis shows changes at three levels: (1) the deep level of culture, social and economic structure, and the physical and biological environment – that is, the broad landscape; (2) institutionalized sectoral, policy, and technological regimes (systems); and (3) ideas, action and innovations. Changes in the broad *landscape* support, but also put pressure on, existing regimes, and open windows of opportunity for
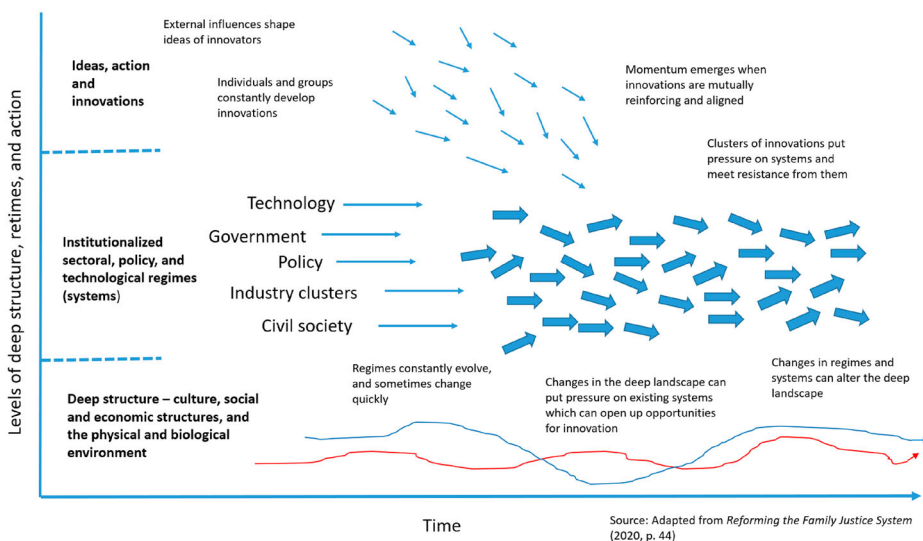
Figure 3. How social transformation happens.

system-changing actions and innovations. Subsequent changes in systems can change the landscape. *Regimes* are generally stable responses to persistent challenges, but regimes can also evolve and can change rapidly – and even collapse – in response to actions and innovations and pressures from the landscape. Regimes vary greatly in their ability to guide and control their environments, but none is ever in complete control. *Ideas, action, and innovations* are influenced by the functioning of regimes and the broader landscape. In turn, the actions of individuals and groups can produce innovations that can be tested and, if workable, scaled to address deficiencies or inadequacies of regimes. System change accelerates when innovations are mutually reinforcing and aligned and powerful supportive coalitions emerge. If the system or systems change enough, societal transformation occurs. System change slows in the face of resistance from opposing coalitions and inadequacies of the innovations on technological, social, political, or economic grounds.

Leadership for social transformation both resembles and differs from strategic leadership of organizations and leading strategy management-at-scale. Leadership for social transformation is far more multi-faceted, broadly based, and political than in most of the management-oriented leadership literature. At the most general level, it means accepting the DAC ontology, an ontology meant to encompass leadership that is 'more peer-like and collaborative … at every level from dyad, to group and team, to organization, to inter-organization, and society overall' (Drath et al., 2008, pp. 636–637). Traditional leadership and management skills are needed, but dispersed across many different kinds of organizations. Unlike traditional leadership, but like community organizing, leadership for transformation also means broadly based leadership, not just top organizational leaders. And it means supplementing traditional leadership skills with:

- Collaboration skills (O'Leary et al., 2012)
- Organizing and mobilizing ability (Almeida, 2019; Bond & Exley, 2016; Kahn, 2010)
- Shared visualization, strategy mapping, and visually assisted strategy management (Barberg, 2017; Bryson et al., 2014; Cherches, 2020; Sibbet, 2012)
- Lots of skilled facilitation (Kaner, 2014)
- Storytelling about humans embedded in complex adaptive systems (Stroh, 2015)
- Broadly based coalition building and advocacy (Birkland, 2019; Crosby & Bryson, 2005; Rubin, 2018; 't Hart & Tummers, 2019).

As with community organizing, opposition needs to be taken into account and addressed (Kahn, 2010; Ackermann & Eden, 2011; Bryson, 2018). Beyond that, multiple collaboration platforms are required to facilitate interconnections, networking, and multiple initiatives (Ansell & Gash, 2018; Ansell & Miura, 2019). Finally, approaches to evaluation need to be rethought (Patton, 2020).

Leading social transformation involves thinking differently from strategic leadership for organizations and leading and strategy management-at-scale. The following premises are useful guides (Patton, 2020, p. 154):

- Systems transformation is the focus for both design, action and evaluation.

- Complexity theory and systems thinking inform and permeate transformative theory.
- Transformation frames the nature, scope, and magnitude of changes desired and needed, but values, stakes, and perspectives inform judgments about the desirability of the direction of transformation
- Systems transcend projects and programmes, though those may be thought of as subsystems.
- Transformation transcends project and programme-level changes while building on and integrating them for greater momentum and cumulative impact.
- No one, no organization, no entity, and no network is in charge of, controls, or manages transformation, but synergistic interactions can propel and accelerate transformation.
- Transformational engagement and momentum will generate opposition and resistance from those who benefit from the status quo.

An additional thinking change involves changing mental models, at least ultimately if not initially, in a deeper way than in strategy management-at-scale initiatives (Kania et al., 2018; Scharmer, 2018; Senge, 2006). The idea is that mental models are typically implicit, because unconsciously held, yet they provide the powerful underpinnings of relationships and power dynamics, which are typically semi-explicitly acknowledged. In turn, relationships and power dynamics underpin explicit policies, practices, and resource flows. That means that changes to policies, practices, and resources flows are limited by relationships and power dynamics, which in turn are limited by mental models. Deep-seated social changes begin, perhaps ironically, with micro-level changes in the mental models held by change advocates. For example, the adoption of the UN's Sustainable Development Goals involved changing mental models about human and economic development in the context of a need for global resilience and stability (https://sustainabledevelopment.un.org).

An Example: The Global Alliance for the Future of Food

The Global Alliance for the Future of Food (https://futureoffood.org/) is a strategic alliance of philanthropic foundations working together and with others to transform global food systems now and for future generations. In June 2012, a group of approximately 25 philanthropic organizations from around the world, driven by a sense of urgency, assembled under the auspices of the United Kingdom's Prince Charles at Highgrove Garden in England to explore shared visions for advancing sustainable global agriculture and food systems in the face of climate change, resource destruction, and food insecurity. The meeting was a follow-up to a speech Prince Charles gave on the future of food at Georgetown University on May 4, 2011 (Prince of Wales, 2012). The meeting created a strong sense among the philanthropies that much could be achieved by catalyzing the emergence of an international collaborative network that could combine energies behind practical strategies for shifting the planet to agriculture and food systems that are more sustainable, equitable, and secure. The Global Alliance (GA) as a collaboration emerged as a consequence of the leadership of the foundations despite differences in size, assets, culture, mission, history, staffing, and programming. These leaders believed in the urgency of advancing sustainable global

agriculture and food systems, and in the power of working together and with others to effect positive change.

The GA's member foundations make grants to support projects, programmes, and initiatives that have identifiable outcomes and concrete implementation strategies to achieve those outcomes. Their traditional approach to making grants and assessing performance involved needs assessment, programme and project planning, design, implementation, and evaluation. Evaluation assesses goal attainment and fidelity of model implementation. In contrast, a defining concept for the Global Alliance from the beginning was the focus on changing systems rather than funding projects and programmes. Systems thinking was at the core of what brought these diverse foundations together.

When they first assembled in a facilitated session to determine how to work together, they began by agreeing on a definition of the problem – inadequate, dysfunctional, and even broken food systems. Together, they saw global food systems that increasingly:

- Are too dependent on fossil fuels and nonrenewable inputs that result in pollution and environmental damage
- Erode human health, social cohesion, rural livelihoods, important social, cultural, and spiritual traditions
- Promote an economic system that privileges corporate culture, results in economic liabilities due to hidden costs, global trade vulnerabilities, and declining rural economies
- Are unresponsive to the knowledge and priorities of citizens in determining food policies and practices from the local to global level

They agreed that as an alliance of foundations, they would provide a collective space to amplify the work of their individual organizations and embrace

> complexity and a global systems view, recognizing that food systems reform must be approached holistically – that is, be built on diverse evidence to demonstrate the interconnectedness and intersectionality of local issues and their impact at the global scale and vice-versa, and to avoid unintended consequences and limited, narrow, short-term solutions. (Patton, 2017, p. 260)

The language of complexity and systems permeated the members' interactions and helped them transcend the diverse perspectives of their individual organizations. As well, these concepts infused decisions about the kind of staff leadership required and the nature of evaluation deemed appropriate for a systems-focused alliance.

Guiding principles. In complex, dynamic systems, agreeing on principles is often far more useful than spending time trying to define mission and clarify goals (Bryson, 2018; Patton, 2017). At a meeting for all participating foundations in Palo Alto, California, in May 2013, the group decided to articulate shared principles to guide the effort, given that groups did not yet have a shared vision for food systems transformation, nor agreement on the definitions of, and boundaries around, the work. The practical utility of the commitment to the principles as an integrated whole was reinforced through a pilot test that involved applying the principles to analyse diverse food systems. In small groups, knowledgeable participants used the principles to describe the current system of beef

production in South America, shrimp production Southeast Asia, smallholder farms in the highlands of Tanzania, and an organic farm in California. The principles proved a powerful diagnostic framework that was a breakthrough in bringing along those who were uncertain about either the value of identifying principles or their utility. The diagnostic exercise also identified areas where wording changes were needed to clarify shared meaning, ensure applicability, and spotlight the commitment to focusing on systems change. After much discussion, testing, and revision, the GA members agreed on six overarching *systems-focused principles*; see Figure 4. The seven principles were adopted as an interconnected and integrated whole rather than a pick-and-choose list.

1. Renewability

Address the integrity of natural and social resources that are the foundation of a healthy planet and future generations in the face of changing global and local demands.

2. Resilience

Support regenerative, durable, and economically adaptive systems in the face of a changing planet.

3. Equity

Promote sustainable livelihoods and access to nutritious and just food systems.

4. Diversity

Value our rich and diverse agricultural, ecological, and cultural heritage.

5. Healthfulness

Advance the health and well-being of people, the environment, and the societies that depend on both.

6. Inclusive

Ensure meaningful and authentic engagement of diverse people and organizations in transparent deliberations, shared power, democratic decisions, and collective actions affecting food systems for the public good.

7. Interconnectedness

Understand the implications of the interdependence of food, people, and the planet in a transition to more sustainable food and agricultural systems

Source: Global Alliance (2020)

Figure 4. Principles of the Global Alliance for the Future of Food.

The importance of the developmental milestone of adopting a set of principles cannot be under-estimated. The representatives of the philanthropic organizations forming the GA came with different institutional perspectives on what constitutes a good goal statement, or strategy, or theory of change. These concepts can be divisive, not just because of substantive differences but because of strong institutionally different format preferences for what a goal statement should include and how it should be written. Organizations also differ widely in what constitutes a strategy. But principles come with less baggage, both substantively and format-wise, so there is more freedom to focus on finding common ground and meaning without the burden of choosing among competing formats. Principles were general enough to provide common ground while specific enough to provide shared direction, and they did not conflict with any mission, goal, or strategy statements by their individual foundations. Articulation of, and agreement on, the GA principles constituted a major breakthrough for the Alliance. They had come together with a sense that collective action was urgently needed, but they were struggling to get to action without some way of framing their shared commitments. The principles did the necessary framing work in support of needed direction, alignment, and commitment.

A major test of the adaptability of the GA occurred when the GA convened a group of important stakeholders in Washington, DC, in 2016 to consider animal production and meat consumption within food systems. Some advocated opposing animal agriculture systems as a major source of pollution (methane) and unsustainable production practices. Others were focused on the humane treatment of animals. Still others were focused on alternative and sustainable approaches to animal agriculture systems, particularly in light of cultural traditions and food security around the globe. Could the GA principles, already agreed to, be adapted to animal agriculture? It turned out they could and were. Key players all committed to working with, not constrained or thrown off by, the complex dynamic system that is the GA.

Formal and informal leadership. Throughout the development of the GA, the need to attend to the interrelationships within and across systems in order to change them was acknowledged and proactively nurtured. One example of this was making informal leadership interactions a priority in addition to establishing formal leadership structures and processes. As the GA developed formal governance processes, created the position of Executive Director, established issue-focused working groups, and other formal institutional structures for decision-making and engagement, informal leadership teams were developed around specific projects (e.g. a research paper) and functions (e.g. annual meetings) to interact around issues of strategy, priorities, processes, conflict resolution, facilitation, and evaluation. This informal interrelationship required trust, mutual respect, honest communications, and, at the essential core, a shared understanding of and commitment to systems thinking, complexity theory, and evaluative thinking.

Evaluation. The GA evaluation process was designed to include questions about how the principles are being addressed and followed in the activities and initiatives undertaken by the Global Alliance and its working groups to support developmental adaptations based on evaluative thinking. The overall evaluation process integrated utilization-focused evaluation, principles-focused evaluation, and developmental evaluation on a global scale (Patton, 2008, 2010, 2017, 2020). Utilization-focused evaluation emphasizes understanding and pursuing intended evaluation use by intended users.

Principles-focused evaluation assesses whether principles are meaningful to those intended to follow them; if so, whether they are adhered to in practice; and, if so, whether they lead to desired results. Developmental evaluation tracks and provides data about social innovations in complex dynamic systems in real time, ongoing feedback on developmental twists and turns, as opposed to more traditional formative and summative evaluations that focus on fidelity to pre-determined designs.

Dialogue within one of the informal leadership teams about how to interconnect different kinds of engagement with the GA led to creation of an *impact matrix of interrelationships* that framed the ongoing principles-focused developmental evaluation. The impact matrix distinguished three *sets of relationships*: (a) the interests and commitments of individual foundation members and their interconnections both informal and formal, (b) the GA as an entity for collective action, and (c) external partners, networks, and organizations who could be allies for food systems change. These three entities had to be nurtured at the process level but also produced different *levels* of outcomes and impacts, including: learning and insights, network changes, and system transformations. Importantly, none of these interrelationships took priority over the others; all had to be nurtured simultaneously in line with the concepts of emergence, systems perspective, and the complex nature of the GA itself and the systems it seeks to influence.

Complex dynamics. Complex systems are dynamic and often show high levels of variability in both space and time. As the GA continued to adapt in significant ways over time its membership expanded, new opportunities to engage key stakeholders emerged, and internal processes required change. Leadership was required that was flexible, nimble, and adaptive.

One change involved adopting a 'Blue Marble' perspective, which refers to the iconic image of the Earth from space without borders or boundaries: a whole Earth perspective. Incorporating the Blue Marble perspective means looking beyond nation-state boundaries and across sector and issue silos to connect the global and local, the human and ecological, and design, implementation, and evaluative thinking and methods aimed at bringing about global systems transformation (Patton, 2020).

Blue Marble *evaluation* integrates design, implementation, and evaluation. Evaluators bring their knowledge and expertise to bear in the design of resilient, sustainability-oriented interventions and initiatives. When an intervention and, correspondingly, an evaluation fail to incorporate an ecological sustainability perspective, both are engaging from a closed system mindset, disconnected from larger patterns and realities. This means that it is essential for planners, implementers, and evaluators at the beginning of their work together to routinely analyse the sustainability and equity issues presented by the formulation of the intervention and the implications for evaluation. Blue Marble evaluation premises and principles provide a framework for that initial review, ongoing development and adaptation, and long-term evaluation of systems transformation contributions and impacts.

Blue Marble evaluation looks backwards (to what has been) to inform the future (to what might be) based on the present trajectory (what is happening now). Evaluators examine what has worked and not worked in the past, not just to capture history, but to inform the future. Forecasts for the future of humanity run the gamut from doom-and-gloom to utopia. Evaluation as a transdisciplinary, global profession has much to offer in navigating the risks and opportunities that arise as global change initiatives

and interventions are designed and undertaken to ensure a more sustainable and equitable future (Patton, 2020). The GA was the first initiative in the world to integrate utilization-focused evaluation, developmental evaluation, principles-focused evaluation, and Blue Marble Evaluation.

Theory of systems transformation. For the last 25 years, design, planning and evaluation have been dominated by the mandate that interventions be based on a theory of change. In January 2020, the GA moved beyond theory of change practice by formally adopting an official *theory of systems transformation*. Distinguishing a theory of change from a theory of transformation has become a critical new direction for leadership, planning and evaluation. A theory of change specifies the causal mechanisms by which a project achieves intended outcomes. In contrast, a theory of transformation specifies how systems are transformed. The focus of intervention and evaluation moves from the project and programme level to the systems level (van Tulder & Keen, 2018; Patton, 2020).

To be credible, useful, relevant, and meaningful, a theory of change must be theoretically sound, empirically-based, and substantively relevant. Theories of change identify and hypothesize the causal linkages that will lead to desired results. Most funders require a theory of change to be included in project proposals. Systems transformation involves a different order of magnitude and speed than project-bound changes. The language of transformation suggests major systems change and rapid reform at a much higher level. A vision of transformation has become central to international dialogues about the future of the Earth and sustainable development.

A theory of change specifies how a project or programme attains desired outcomes. Systems transformation is not a project. It is multi-dimensional, multi-faceted, and multi-level; cuts across silos and often national borders; bridges across sectors and specialized interests; connects local and global; and is sustained across time. A theory of systems transformation incorporates and integrates multiple theories of change operating at many levels that, knitted together, explain how major systems transformation occurs.

The GA has adopted a strategy aimed at stimulating local and global action and interaction for transformational change in collaboration with other committed stakeholders. Transformation means realizing healthy, equitable, renewable, resilient, inclusive, and culturally diverse food systems shared by people, communities, and their institutions. The GA has adopted a succinct theory of transformation that informs its activities and provides a basis for evaluating its products, activities, and impacts through the lens of transformational engagement. The theory may be summarized as follows (https://futureoffood.org/the-global-alliance-makes-history-with-formal-adoption-of-a-theory-of-transformation/):

> Genuine food system transformation takes place when diverse actions, networks, and individuals intersect across sector and issue silos, the global and local, the macro and the micro. These intersections facilitate convergence around shared visions and values and, ultimately, build critical mass and momentum behind tipping points that lead to healthy, equitable, renewable, resilient, and culturally diverse food systems that dynamically endure over time.

In the next section we discuss several aspects of leading social transformation and offer several conclusions.

Discussion and Conclusion

This article has focused principally on what *leading social transformation* is for, what it consists of, and how it works, especially from the standpoint of leadership. Leading social transformation builds on strategic leadership of organizations and leading strategy management-at-scale initiatives by integrating and co-aligning the efforts of multiple organizations, collaborations, coalitions, and advocacy efforts guided by shared principles and animated by common purposes. The required changes are multi-issue, multi-level, multi-organizational, and cross-sectoral, and can cross national frontiers. As noted earlier, deep and broad changes, often involving radical innovations, are needed in multiple fields and regimes. Significant changes in relationships – including power relationships – among people and groups are required. Ultimately, this calls for a very large, very broadly based, loosely coaligned social movement, including, but moving well beyond, organizations and collaborations. If one thinks of leadership as a response to challenges, leading social transformation is a key element in addressing the most significant challenges the world faces, such as climate change and inequality.

As the GA example illustrates, effective leadership of social transformation requires a different kind of theorizing than does typical strategic leadership or leading strategy management-at-scale. It requires a theory of transformation, which is different from a logic model, strategy map, or theory of change for an organization or collaboration. Logic models, by articulating linkages among inputs, processes or activities, outputs and outcomes are good for helping lead and manage programmes and projects (Funnell & Rodgers, 2011). Strategy mapping moves beyond programmes and projects to provide an overall strategic framework for an organization or collaboration (Barberg, 2017; Bryson et al., 2014; Kaplan & Norton, 2004). Theories of change occupy essentially the same conceptual space as strategy maps, but are generally less detailed. Logic models, strategy maps, and theories of change embody hypothesized causal relations among actions and outcomes. In contrast, a theory of transformation integrates at a high level multiple theories of change. There is no attempt to fully articulate cause–effect relations because the presumed context is one of complexity and dynamism. Instead, a theory of transformation flows from and results in a broadly shared and adaptable set of guiding principles that can be incorporated into theories of change, strategy maps, or logic models at lower levels for more specific purposes. Ongoing utilization-focused, principles-focused, and developmental evaluations from a Blue Marble perspective and ongoing learning help clarify what works and what doesn't and how best to refine the theory.

Leading social transformation also requires a form of leadership that goes far further out, down and up than the strategic leadership of a single organization, collaboration, coalition, or advocacy effort. Leadership of organizations, collaborations, coalitions, and advocacy efforts is still important for transformation, but not enough. Instead, advancing social transformation requires leadership that is deeply relational (Uhl-Bien & Ospina, 2012), visionary (Crosby & Bryson, 2005, 2010; Senge et al., 2015), political (Burns, 2004), and adaptive (Heifetz et al., 2009). It also requires broadly based leadership that is adept at systems thinking (Richardson, 2020; Stroh, 2015) and conversant with complexity theory (Uhl-Bien & Arena, 2018). This means a leadership that is comfortable with emergence, holism, boundary concerns of endogeneity and exogeneity,

strategic and evaluative thinking, inter-relationships, adaptability, and dynamism (Patton, 2020).

In terms of research, what seems to be required most is a set of longitudinal, comparative case studies. The case illustrations in this paper are just that – examples of so-far-successful efforts to make major changes. The efforts to change the family justice system in Canada are part of a larger effort to address the adverse effects of ACEs; fully addressing those effects will require far-reaching transformations of multiple systems. The use of strategy management-at-scale mapping technology makes the effort particularly instructive from a leadership standpoint. The GA effort has tackled a huge, multi-issue, global challenge. There the lessons regarding leadership highlight the importance of guiding principles and a theory of transformation. Longitudinal, comparative case studies can help clarify what works, how, and why, and what specifically leadership for social transformation entails. The promise of such work – in which practice is clearly leading theory – is that we may just be able to respond effectively to the planet-, peace-, and justice-threatening challenges – such as climate change and inequality – that demand urgent and necessary social transformations.

Disclosure Statement

No potential conflict of interest was reported by the author(s).

Notes on Contributors

John M. Bryson, PhD is McKnight Presidential Professor Emeritus of Planning and Public Affairs at the Hubert H. Humphrey School of Public Affairs at the University of Minnesota, U.S. He works in the areas of leadership, strategic management, collaboration, and the design of engagement processes. He wrote *Strategic Planning for Public and Nonprofit Organizations, 5th Edition* (John Wiley, 2018), and co-wrote with Barbara C. Crosby *Leadership for the Common Good, 2nd Edition* (Jossey-Bass, 2005). Dr. Bryson is a Fellow of the National Academy of Public Administration. He has received lifetime scholarly achievement awards from several academic professional associations, including in 2021 from the International Research Society for Public Management.

Bill Barberg is the founder and president of InsightFormation, a consulting firm headquartered in the Twin Cities of Minnesota, U.S. He is a globally recognized expert in strategy management, collective impact, and balanced scorecard methodologies, and a highly sought-after speaker for organizations, communities, and coalitions striving to address issues that no one organization can address alone. He was the winner of the 2018 'Health System Transformation' award for his innovative work to advance collaboration around the opioid/heroin/fentanyl crisis from Communities Joined in Action, a national membership organization of local and regional community health collaboratives.

Barbara C. Crosby, PhD is an emerita faculty member at the Hubert H. Humphrey School of Public Affairs, University of Minnesota, U.S. She has taught and written extensively about leadership and public policy, cross-sector collaboration, women in leadership, and strategic planning. She is author of *Teaching Leadership: An Integrative Approach* and co-author with John M. Bryson of *Leadership for the Common Good: Tackling Public Problems in a Shared-Power World*. She holds the top teaching award from the Network of Schools of Public Policy, Affairs, and Administration (NASPAA). She also received the 2019 Keith Provan Award for Outstanding Contributions to Empirical Theory from the Public and Nonprofit Division of the Academy of Management.

Michael Quinn Patton has 50 years' experience as an evaluation practitioner, is author of 8 major evaluation books, former president of the American Evaluation Association, and Professor of Practice in the Claremont Evaluation Center, Claremont Graduate University. He is a recipient of the Alva

and Gunnar Myrdal Award from the American Evaluation Association for 'outstanding contributions to evaluation use and practice.'

ORCID

John M. Bryson 🔵 http://orcid.org/0000-0001-8439-6054
Michael Quinn Patton 🔵 http://orcid.org/0000-0002-4706-2941

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