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TAKING A RADICAL STANCE FOR COMPLEX JOY IN THE WORK OF SHAPING CHANGE

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Seated in a room of deep divisions, people who are committed to trying to move forward together sit in concentric circles. The outer circle leans in to support a group who are remarkably and undeniably different from them.

The inner circle shares their hopes and ambitions, their truths, their frustrations, and the reality of their experiences in a system that they have dedicated their lives to. A system that is broken.

There are tears, and there is anger. There is resonance, and there is dissonance. Many are moved. Many are changed by this deep truth telling, while never forgetting that the work they are here to do is also deeply strategic …

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As Japanese-American avant-garde artist and musician Yoko Ono remarked, “a dream we dream alone is only a dream. A dream we dream together is reality” (Sheff, 2000, p. 16).1

Shared commitment and collective action can mobilize creativity and imagination to shape human and planetary futures (Montuori & Donnelly, 2020). The need to cultivate capacities essential in creating shared, equitable futures is significant, particularly in the face of climate change, loss of biodiversity and cultural diversity, racism, poverty, vast multi-dimensional inequities, a pandemic, and the need to grapple with the present legacies of colonialism, among others. Alongside the challenges ahead of humanity, there are signals all around that can guide potential futures, and it is the work of collaboration and collective mobilization, rather than individuals or organizations working in isolation, that can open ways forward (Magzan, 2011). But learning how to foster spaces where human creativity, connection, and bold action thrive can be illusive, particularly given the ways that inequities play out across race, class, gender, ability, and geography (Struthers, 2018).

In this chapter, we share some of our lessons learned as a practitioner and scholar-practitioner within the field of participatory leadership (a form of social creativity), equity, and large-scale change work, with over 40 years of combined experience. Tuesday is a Black biracial woman living in the midwestern United States and Gabrielle is a European-white-settler-first-generation woman living in Mi’km’ki (Nova Scotia, Canada). Between us as practitioners, we have studied and learned within the Art of Hosting Network, Deep Democracy (Lewis Method), Emergent

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Strategy Institute, Interplay, Berkana Exchange community, and cultural bridges to justice. Our relationship is one of holding both differences and commonalities simultaneously and acknowledging the multiplicity of ourselves, our stories, ancestries, and experiences.

Through *The Outside*, we work with organizations, communities, and networks to activate systems change pathways that center on equity. *The Outside* began as an experiment and a question: can we lead systems change work that firmly centers on issues of equity—race, gender, class, and nationality—into every aspect of the work? We had a longing to center equity in large-scale change efforts, but without the dogma that can accompany activism (Montgomery & Bergman, 2017) or naivety around what these initiatives require. Since 2018, *The Outside* has been engaged by large organizations, including an international humanitarian organization with 18,000 staff and the New York City child welfare system. We are working with small organizations and networks too, some of less than 20 staff, including a national membership network that connects local food producers into schools and education environments as well as a small start-up non-profit dedicated to expanding economic opportunity and equity for families in a large US city.

What all the organizations and networks we work with have in common is a hunger for big change that is ambitious—change that leaves no one behind. Within each of their contexts is a recognition that a focus on equity must be fully embraced, or the changes that they are seeking won’t make any real difference (or any real difference that matters). Whether their aspirations are to shift the entire US food system, change the state of practice of supporting peace in conflict-ridden locations and warzones, or directly addressing the racial wealth gap in one of the largest cities in the world, they are all up to big work and understand that to ignore issues of equity will only retrench and reinforce the status quo (Kania & Kramer, 2015).

Engaging and growing this work has required the creation of a team that combines the expertise and knowledge, heart and perseverance needed for big change work, and deep commitment to daily practice that this field requires. Our teams are intentionally cross-racial, multi-gender, and geographically diverse, with the explicit aspiration to practice the future we want to see in the present.

As facilitators, strategists, researchers, and evaluators, we co-design a process and roadmap with those at the heart of this “big change” work, with the purpose of working to collectively shift structures, resource flows, policies, patterns, relationships, interactions, beliefs, and behaviors that are obstacles to the futures envisioned (Kania et al., 2018; Moore et al., 2015). As systems and complexity theories illuminate, addressing root causes requires multiple perspectives and a reimagining of established ways of working, where current approaches are insufficient or outdated (Meadows, 2002).

We are imagining new systems and ways of being. While “change” is neutral, it can be imbued with principles to support a direction of travel (Snowden & Boone, 2007). In our work of centering equity, we provide a clarion call for generative change, providing experience, tools, processes, practices, and strategies alongside a widening of worldviews. No one can promise systems change, but we coalesce knowledge and action-oriented practices to support the journey toward more compelling futures. Our commitment is to equitable futures, and we enact this commitment by engaging the creativity of coalitions that reflect and embody the futures that we want to see.

In this chapter, we’re not offering solutions but sharing insights, practices, learning, and glimpses of ways forward. We explore the necessity of a systems change lens in the effort toward equitable futures, why taking action together is vitally important, and the tensions we’re encountering in this space, as well as share our emerging perspective on cultivating a sense of *complex joy* in the work.

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We don’t change systems: A systems change lens

There is a lot of hubris surrounding systems change. Admittedly, it can come across as grandiose or as a glossy sales pitch in the consulting world. It’s increasingly all over the top consulting firms’ slogans and embedded in corporate coaching culture. We want to begin, right from the start, to address the loftiness, arrogance, and inaccessibility that can come with “systems change” language in practice. In an article published by the Rockefeller Philanthropic Advisors (2019), Naamah Paley Rose shares how many foundation staff have openly shared that they avoid using the phrase “systems change” because it is a “sure-fire way to make [people’s] eyes glaze over” (Rose, 2019, para. 6). In our work, we often hear “what is a system exactly, and from there, what is systems change?”, while others ask, “is systems change even possible?” (usually with a huff and an eye-roll)

The reason we use systems change language, despite the challenges (and frankly, misuse), is to illuminate how systemic patterns are often obstacles to change. These could be institutional patterns but also larger systems of patriarchy, neoliberal capitalism, and racism that transcend organizations and even societies; these patterns are global in nature but always have their own local flavors. Any work that involves shaping change must involve the ability to zoom out to understand the nested patterns and systems that are in play. Within these larger contexts we find ourselves working within organizations to tackle tough problems or at the intersections between organizations, community groups, and institutions with a sense of shared work. We take a system change approach—not the assurance that we can change systems but bringing a lens that illuminates the complexities of what’s ahead of us, the understanding that isolated efforts are not enough, and with practical tools and methods that can activate systems change pathways. As Nora Bateson writes, “change is not made, but systems do learn” (Bateson, 2020, para 6). In our experience, learning about systems occurs through disrupting their patterns, seeing the results, and disrupting them some more in our desired direction.

To this work, we bring our skills, strategists, facilitators, and practitioners. We have a current theory of change that we hold lightly. We identify systemic patterns—working with and engaging tensions and dilemmas is a significant part of our work, and engaging at the level of beliefs and assumptions to disrupt these patterns is critical. We aspire to centre the relationship between action, theory, and reflection, with an emphasis on immediate learning through experimentation over long-term planning that can drain energy, enthusiasm, and resources. Too many strategic plans provide vision but no way to get there—we activate the middle space, between vision and action, a space of participatory leadership.

Pulling toward the arc of justice

What we see in our work is the possibility to shift individuals and groups as well as multiple overlapping systems and patterns—the individual, relational, community, organizational, institutional, societal, and planetary. This understanding of working at all levels all the time influences how we approach, strategy, action, and the centrality of relationships. We place equity at the centre of our work, which means it informs and influences all our thinking and every action we take. We remind each other of equity when it goes out of focus. In our work, one of the central principles is creating the future we want to see in the present, ensuring that the diversity of our teams and those we work with reflect this as a non-negotiable. In these ways, equity is an evolving practice and not just a destination.

A well-beloved quote of Martin Luther King, Jr.’s is that the “arc of the moral universe is long, but it bends toward justice.” While some might read this as justice is inevitable,
generative change takes time and commitment. In a 2016 interview, former Attorney General Eric Holder cautioned that “the arc bends towards justice, but it only bends towards justice because people pull it towards justice. It doesn’t happen on its own” (Smith, 2018). In our experience, it also doesn’t just happen according to strategic plans, logical models, or five-year goals, although each of these approaches can play a helpful role. It also doesn’t happen in isolation but involves woven layers of multiple efforts, strategies, surprises, and unanticipated tipping points.

There are ancestors before us, as well as those ahead of us, who will see so much in their lifetimes that are only vague possibilities in our own. Part of propelling this long arc of change and navigating uncertain outcomes is seeing ourselves as part of these change lineages. We cultivate a perspective that being in service to the long arc is a gift, a bequest, from our ancestors and have committed ourselves to creating a different future for our descendants.

We aspire to live this at The Outside. The teams that lead the work come from a breadth of lineages, and part of our task is to figure out—today—how to be together after the combined tragedies of our pasts. In our commitment to working cross-racially, we are descendants of the enslaved and slavers, the colonized and the colonizers, the executed and the executioner, those who rushed into holy wars, wars for profit, and conquests for land, and those who are dispossessed, forsaken, and have moved far away from the ancestral lands that know them. There are also the more subtle lineages present of those who claimed neutrality but at great cost. We are all these lineages, manifesting in one team. We are a great mix of it, within ourselves and between each other. Our teams are reckoning with this in each meeting, in each conversation, in each interaction with clients, and in each of our own hearts.

We situate ourselves within the long arc of change and invite those we work with to do the same. As post-activist philosopher Bâyò Akómoláfé invites us, while “these times are urgent, we must slow down.”5 There is danger in succumbing to the urgency of today without pause, reflection, and deep care for a future. This urgency does not serve our ancestors and the journey that they began on behalf of themselves and future generations. Dissolving into short-term thinking and giving in to the urgency of today is a danger in this work, and a daily tension to navigate. We support the organizations and networks we work with to cultivate patience alongside the grit and determination needed to take steps together toward tomorrow. We can move along the long arc of change only through an integration of reconciliation accompanied by deep truth-telling.

This does not mean that we are slow and plodding or only incremental in our change, as we discuss next. It does mean that our action is considered and informed by theory, reflection, and historical and present context so that the work is ready to move swiftly when the time comes. It can move with the need of the moment in smart ways that have deep roots. (And, of course, we are full human beings who are also fools to our passion and swept away with enthusiasm sometimes because that is part of the long arc, too.)

**Emphasizing action and learning**

Action learning is the foundation of our work. From an understanding of living systems and complexity (Capra & Luisi, 2014), we are working from the assumption that change efforts are best initiated by starting the work we set out to do and learn along the way rather than getting stuck in lengthy phases of analysis, visioning, strategic planning, or team building exercises before we begin. It’s important to make it clear right up front that we don’t approach action learning in opposition to planning, research, and reflection. They are embedded and layered in supportive ways. But getting to work together on real problems we are facing helps
us navigate our way into clarity around next steps, rather than getting caught in assumptions about what we think will work, which often go unchallenged and can lead to costly dead ends that could have been redirected more quickly. Embedded in this action-oriented approach is an emphasis on data-informed developmental research and evaluation approaches, which walk alongside the actions and efforts (Patton, 2011, 2019; Schön, 1983; Senge, 1990). We find that asking people to shift real-life problems that they are facing—not case studies or hypotheticals—makes the learning more real and tangible and equips us to address the inevitable problems that will be faced further down the road.

Another benefit of action learning is that it can grow the capacity of the group and the individual at the same time. While the actions taken are collective, it is also empowering and spurs growth within individuals because it requires participants to think relationally, critically, and work collaboratively (Marquardt et al., 2018). This relationship between group problem-shifting and enhanced individual leadership is reciprocal and additive. When we work this way, participants are both strengthened in their own capacity and feel part of something meaningful that they could not do alone.

The field of action learning (developed in the 1940s) is suited to addressing complex problems that seem intractable and is an approach that elevates the norms of collaboration, creativity, and courage of groups (Boshyk & Dilworth, 2010). Today, this approach has many offshoots and adaptations, but the heart of it remains an accessible and easy way for people to come together and get to work. We’ve experimented with prototyping approaches, social labs, and project-based learning—there is a multitude of methods out there to draw on.

Our emphasis on learning through action—informed by research and reflection—is because we have learned so much in taking action that could never have been learned through simulations or strategic planning processes. In converging toward action, we’ve noticed three tensions that the groups we work regularly navigate: a tension between preparing for the work and getting to work; a tension between action and reflection; and finally, a tension between the slower work of equity with the sense of urgency needed around transformation.

**Tension: Preparing for the work ~ Getting to work**

While we encourage groups to get to work, often more quickly than they’d like or feel ready for, we are not against good preparation. Preparation is important. It’s necessary. It is foundational, but we like to position that work as preparing for action. Preparation for action is quite different from preparation for planning or understanding. Good preparation, in our view, is used to support action to take place. But there is often a lot of work to do to navigate the tension between planning the work and getting to work. Within the broader cultures of the primarily euro-western contexts we work in, “robust” and “rigorous” analysis is often where change efforts start, leading to a lengthy preparation phase where action never actually transpires. And yet, there are so many meaningful reports unused or unacted from, so many strategic plans that become obsolete before their five-year expiry date, and so many lists of recommendations continually recycled. Even given this, we are often forging through fear, forging through an assumption within a group that as much as possible must be known before beginning, which can slow down the work of change considerably.

Another dimension of this tension between planning and action, in our experience, is that in collective work there is often a moment of insight: a collective awakening or understanding of something that wasn’t visible or possible before. This moment of insight is rich in possibility and can be defining for the group. But a tension occurs when insight is often mistaken for action. A group may develop the belief that because there is shared clarity and understanding,
the work is done. The group is so satisfied that they’ve broken through to something together that it becomes easy to forget that the next step is *taking action that arises from the insight*.

Insight and planning are necessary but insufficient. We need insight to spur us to action, not just to better thinking. And that’s why sensing and planning and understanding and analysis (which yield insights) are helpful, but insights that arise from action are better. These kinds of insights tend to generate more action. They build momentum and yield even more actionable insights, and so the cycle of good work can continue.

**Tension: Action ~ Reflection**

A common assumption that we bump up against in introducing action learning approaches, is that it means being in action all the time. Those engaged in change efforts can develop a tendency toward funneling everything toward action, toward *doing something*. This is especially tempting in these days of overwork and hyperproductivity. But action without reflection and data-informed developmental research can lead to a whole host of issues—recreating the wheel of what works, negatively impacting communities without realizing it, going with one’s idea of what will work rather than discovering what is working through inquiry. Reflection and data-informed developmental loops are an integral part of the approach we bring to large-scale, long-term change work through methods like Developmental Evaluation (Patton, 2011).

Counter-intuitively, reflective and developmental research loops can actually speed up the work and amplify effectiveness, as we can pivot more quickly when something is clearly not working. At the same time, it also supports the group in slowing down to take the time to strengthen relationships, investigate any of the challenging dynamics that have arisen, develop a new approach, share what’s working well with others, and build the collective intelligence of the whole group. This is not without resistance as the urgent often eclipses the important. As in action learning, we have seen the need to provide more close support and coaching to ensure that the learning part of “action learning” happens. This is one of the tensions we grapple with—when to move forward and when to pause—when so much feels urgent in these times and in the lives and contexts of the people we work with. Continuing to foster both action and data-informed reflection and building the skills (and carving out the time!) for both is central to the work.

**Tension: The slow work of equity ~ Urgent need for transformation**

Action learning is where the work of equity happens in the present, as we move toward the futures we want to see—through strengthening the skills of collaboration and creativity. Equity is realized through how we work together and what we create together.

There is an inevitable tension between getting to action and getting to equity. While most of us want issues of race and gender and other power differentials to be resolved *right now*, we also want them to be addressed in the right way. These desires cause strain and stress because we often feel that we cannot fail in our equity efforts. The stakes are too high, and the impact is too important.

But, of course, getting to action quickly means inevitable failure. Action learning means we learn from the action we take—some of that action will be effective and we can build from that success but often, when it doesn’t work, we are taught painful lessons. Both are valuable. Both lead us closer to the equitable future we want to create, but our tolerance from the “failure lessons” is low when our legacies of enslavement, colonization, marginalization, and victimization are so present.
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In our work, we are explicit about this tension and the need to work with it. We set up experiments that are, in Dave Snowden’s words, “safe to fail” (Snowden & Boone, 2007) so that we can tolerate and learn from the actions we take. And we are careful to co-develop experiments that don’t negatively affect those who are already disproportionally impacted. There is a long history of experimenting on marginalized and racialized people and communities, and we move into this phase of the work with care, attention, and awareness.

But we still insist that we take meaningful action around issues of equity together. It’s risky and flies in the face of more typical equity work that is prescriptive and sells certainty in the face of our fears, but it’s necessary. Because when we do, we can get a feeling of what an equitable future looks like—patterning what we want to see in the present world through our actions. Through our actions we give each other glimpses of the future we can work toward right now. In the present. Not perfect. But moving us in the right direction.

Inviting complex joy

The work of equity and systems change can be conceptually big and emotionally heavy. In our experience, the urgency and immediate needs can often evoke a sense of duty and a seriousness in those we work with, leaving little space or permission for joy. For us, the way in which we work is as important as the work we do. If we begin to believe and act as if there is no room for levity, fun, or joy in the work, we become serious people doing serious things (i.e., saving the world, as the saviour complex is an insidious danger trap) and we do it with a furrowed brow and our hands tightly gripping our goals so that they don’t slip away.

While the urgency is immediate and real, we can see that it does not lead to the kind of sustained energy and commitment that the long arc of transformative change requires. Because systems change is long-term work, we may never actually reach our longed-for goals in our lifetimes: equitable societies, a healing and thriving earth, and a just and peaceful world. Given this, how we go about the work matters. As we get deeper into our own journeys as practitioners, joy is becoming an increasingly central principle of our work.

There is another way. A joyful way. A way that allows for the possibility that the process of making change can be pleasurable and full of joy, whether we meet our goals in the moment or not. A way that allows for us to be fully alive as we go about creating change. We can choose a joyful path: one full of moments of challenge, struggle, and triumph or we can choose a painful path, with those same moments of challenge, struggle, and triumph.

Joy is commonly understood as emotion tied to well-being, happiness, and delight, primarily through attaining what we desire. There is an assumption that joy cannot be present when life is a struggle or when challenges arise (Krumrei-Mancuso, 2020, p. 61). If we think of joy this way, it is always a faraway goal. It is a goal that many of us cannot reach. If good fortune is prerequisite to joy, what does that mean for those of us born in brown and black bodies, born women, born in a land that we are forced from, born without typical abilities? Is joy not available to us because of societal structures that do not allow our good fortune by birth? Of course not. And the “prospect of possessing what one desires” (Merriam-Webster, n.d.) locates joy outside of ourselves and in a place of material or spiritual attainment that may be impossible for many of us due to circumstance. In our work, we are committed to reimagining joy as an experience available to us simply because our humanity must be sought.

In our work we seek to create the conditions that invite a deeper joy, a more complex joy. Joy can occur in the middle of the very gritty and real work of equity and systems change.

In this context, we see joy as the delight that arises from a source of meaning through relationships, connection, and working toward something together, or working something
through together (Krumrei-Mancuso, 2020). This kind of joy reflects the fullness of being alive and allows for joy amidst some of our toughest challenges. Connecting with other competent creative humans working for change is an antidote to despair and cynicism. When we look for and find them, they lighten the burden of our efforts. We can find joy in being in it together—the joy of collaboration, the joy of conviviality, the joy of working toward something together (Montuori, 2008). In our experience, when we access this kind of joy together it is a powerful joy and can be experienced during some of our most challenging work. This joy, then, is a place where we can find new aspects of ourselves, ask our hardest questions, and deal with our deep-rooted fears related to our work.

In our process design, we don’t demand that people experience joy but seek to create the conditions for joy to arise. Joy can be a collective experience as well as individual (Volf, 2015) and can be accessed through the ways we are together—working across class, race, gender, age, and roles. In our work, this “staying together” happens across groups of diverse people, which is often a different and revelatory experience for many. It is distinct from the tight, fierce joy of belonging that can happen in identity groups, although we are always on the lookout for how it may cast the same exclusive “us versus them” shadow that can develop as any identities of belonging form (Donnelly & Montuori, 2022). The purpose here is not for a tight sense of belonging to develop that is exclusionary of others, where joy is derived from a linked-arms identity of who is in and who is out. It is a commitment to the art of cultivating an expansive and accommodating quality of joy that can sustain the work that can nourish and replenish us as we tackle the issues of our times.

This across-group joy isn’t easily arrived at or without conflict. That is the gift of it. It is joy that is hard won after we have seen each other’s faults, perhaps caused each other injury, and come out on the other side seeing each other more fully and with meaningful work that we are willing to do together. When this kind of complex joy can be accessed and becomes the fuel for the work—rather than a sense of duty—we can do this work because we want to, not because we must. The necessity of the work—and it is necessary—doesn’t take away joy. It can add to it and amplify it. It is a joy that allows us to imagine more wildly, work with more skill, and continue to walk this long, necessary road of change.

**Conclusion**

Today, there is an immediacy to the living, breathing legacies, deep divisions, and inequities of the past and present. There are also people trying very hard, in a multitude of ways, to build different futures together. As practitioners supporting and leading a large-scale change effort, we’ve shared a few aspects of what we’re learning along the way, to better support other initiatives and practitioners in similar and shared work. Our approach is grounded in the assumption that there are exceptional humans everywhere, working toward new worlds. Even now. Quietly or loudly. Slowly and slowly even when it seems quickly. In ways that are visible and invisible. This knowledge—that many people are creating more compelling futures—is what brings us joy and sustains us in the long arc of change. We can’t know the end, but we can join those who are showing up and making the effort over and over again.

*Back to the concentric circles …

The inner circle shifts to the outer and listens. A third shift and everyone listens some more. Listening continues until glimmers of possible actions taken together begin to emerge.*
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When everyone leaves the circle, action plans arise from imaginations and expertise, bringing to life experiments that will succeed and fail. There is a commitment to learning from these experiments and trying again, of telling truths about a system that no one wanted to tell before. They are changing systems in ways that could not have been imagined before, and they are doing it together.

Notes
1 A line written by Ono many years before and quoted by Lennon in December 1980 in an interview with David Sheff.
2 See www.findtheoutside.com for more information about the organization. We are a global consultancy that works on equitable and enduring change. Also, a big thank you to The Outside Team for informing the content of this piece.
3 The phrase “shaping change” is attributed to science-fiction writer Octavia E. Butler and her novels *Parable of the sower* (Butler, 1993) and *Parable of the talents* (Butler, 1998), more recently popularized in the work of facilitator, writer, and activist adrienne maree brown (brown, 2017).
4 King paraphrased a portion of a sermon delivered in 1853 by the abolitionist minister Theodore Parker. In that sermon, Parker said: “I do not pretend to understand the moral universe. The arc is a long one. My eye reaches but little ways. I cannot calculate the curve and complete the figure by experience of sight. I can divine it by conscience. And from what I see I am sure it bends toward justice” (Smith, 2018).
5 The title of Akómolólé’s forthcoming book.
6 This piece has not addressed the personal dimensions and practices that are essential in supporting these kinds of change efforts, which we will write about in the future.

References


