



# Systems Thinking for a Strategic Lifespan

National Center for Family Philanthropy

Strategic Lifespan Peer Network

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David Peter Stroh, Bridgeway Partners

Brian Collier, Foundation for the Carolinas

# Webinar Purpose and Goals

**Purpose:** explore the implications of systems thinking for developing your foundation's strategic lifespan

**Goals:**

- Understand why good intentions are not enough to create a lasting legacy
- Distinguish conventional from systems thinking
- Learn a primary framework for thinking systemically
- Understand how one foundation applied systems thinking to focus its efforts on increasing upward mobility



# In the News

*Homeless  
shelters  
perpetuate  
homelessness*

*Food aid  
increases  
starvation*

*“Get tough”  
prison sentences  
fail to reduce  
fear of violent  
crime*

*Drug busts  
increase drug-  
related crime*

*Job training  
programs  
increase  
unemployment*

**What do these stories have in common?**

# Failed Solutions Have Common Characteristics

- Address symptoms vs. underlying problems
- Obvious and often succeed in the short run
- Short-term gains undermined by long-term impacts
- Negative consequences are unintentional
- If the problem recurs, we do not see our responsibility



# Good Intentions Are Not Enough

*When you are confronted by any complex social system ... with things about it that you 're dissatisfied with and anxious to fix, you cannot just step in and set about fixing with much hope of helping. This is one of the sore discouragements of our time.*

*If you want to fix something you are first obliged to understand ... the whole system.*

Lewis Thomas  
President, Memorial Sloan-Kettering Institute  
Dean, Yale Medical School and NYU School of Medicine



# Implications for Your Strategic Lifespan

1. Take time to understand the root causes of the problem you want to solve before intervening

# Definitions

## System

an interconnected set of elements that is coherently organized in a way that achieves something (Donella Meadows)

## Systems Thinking

the ability to understand these interconnections in such a way as to achieve a desired purpose



# Systems vs. Conventional Thinking

## Conventional Thinking

- Problems and causes obviously connected
- Others are to blame
- Short-term success leads to long-term success
- Optimize the parts
- Do as many things as you can at once

## Systems Thinking

- Problems and causes not obviously connected
- We are part of the problem
- Most quick fixes yield no difference or make matters worse over time
- Improve relationships among the parts
- Look for leverage: focus on a few key coordinated changes over time

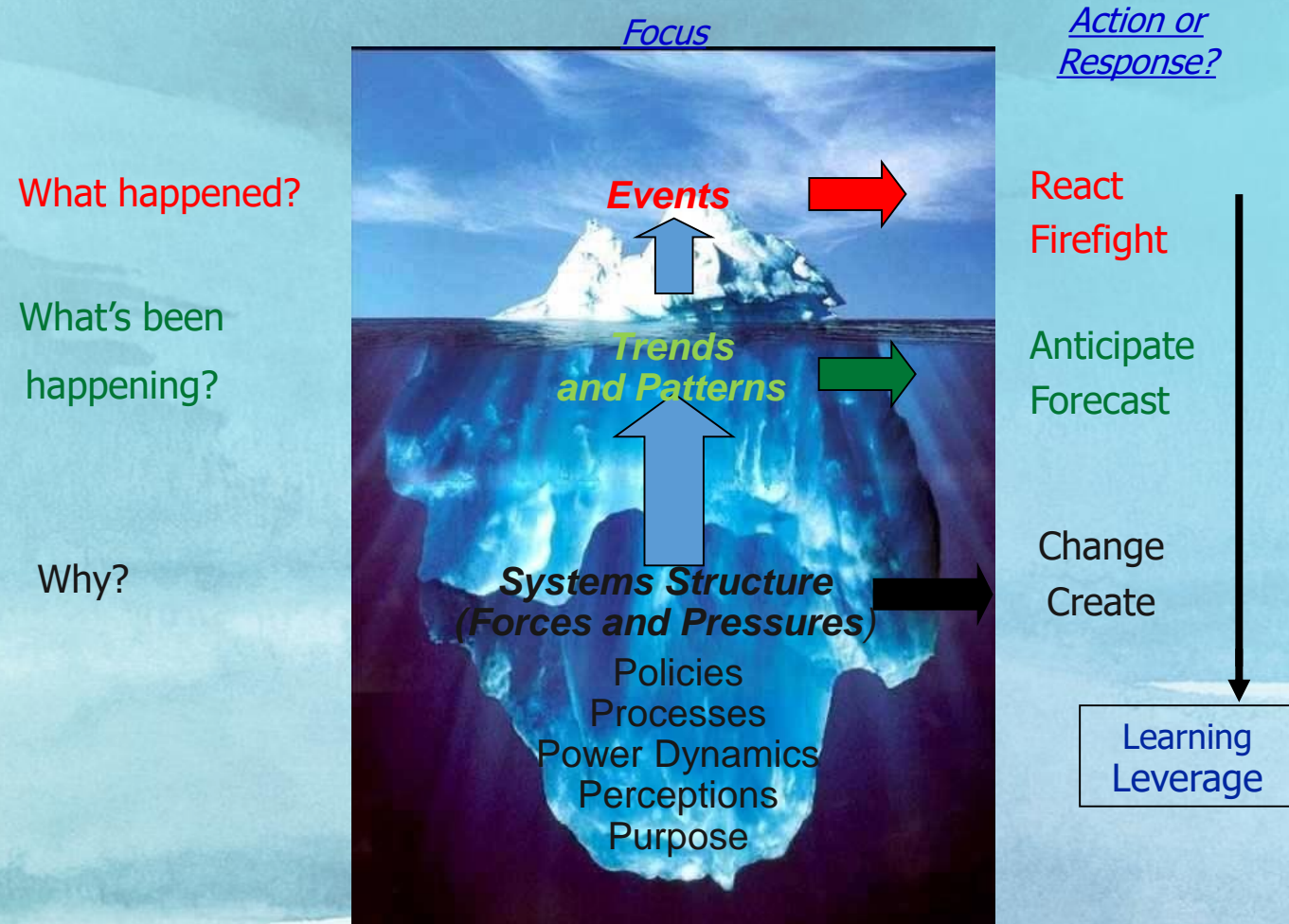


# Implications for Your Strategic Lifespan

1. Take time to understand the root causes of the problem you want to solve before intervening
2. Inquire into how you might be part of the problem – not just part of the solution
3. Think about the short-term within the context of the long-term
  - Help people develop a shared vision and shared picture of current reality
  - Focus on creating short-term successes vs. quick fixes
  - Typically, short-term successes develop new relationships and capacities – not outcomes
4. Invest in building new relationships
  - Partner with other foundations – focus on results vs. credit
  - Use your convening power to gather diverse (often multi-sectoral) stakeholders
  - Help the stakeholders *think* systemically
  - Build backbone organizations to sustain new relationships and behaviors
5. Identify leverage points and a systemic theory of change



# Different Ways of Talking About Reality: The Iceberg





# Implications for Your Strategic Lifespan

6. Invest in interventions that shift the bottom of the Iceberg, e.g. policies, power dynamics, perceptions, purpose. Examples include:
  - Participation that is grass roots – not just grass tops (including voice of ultimate beneficiary in the room)
  - Evaluation to inform advocacy (based on metrics derived from your theory of change)
  - Advocacy to shift policies
  - Think tanks to influence perceptions and purpose
  - Systems vs. social entrepreneurship to influence power dynamics and policies



## Breakout Rooms: Implications of Systems Thinking for Your Foundation's Strategic Lifespan

1. Take time to understand the root causes of the problem you want to solve before intervening
2. Inquire into how you might be part of the problem – not just part of the solution
3. Think about the short-term within the context of the long-term
4. Invest in building new relationships
5. Identify leverage points and a systemic theory of change
6. Invest in interventions that shift the bottom of the Iceberg, e.g. policies, power dynamics, perceptions, purpose





[Leadingonopportunity.org](https://Leadingonopportunity.org)

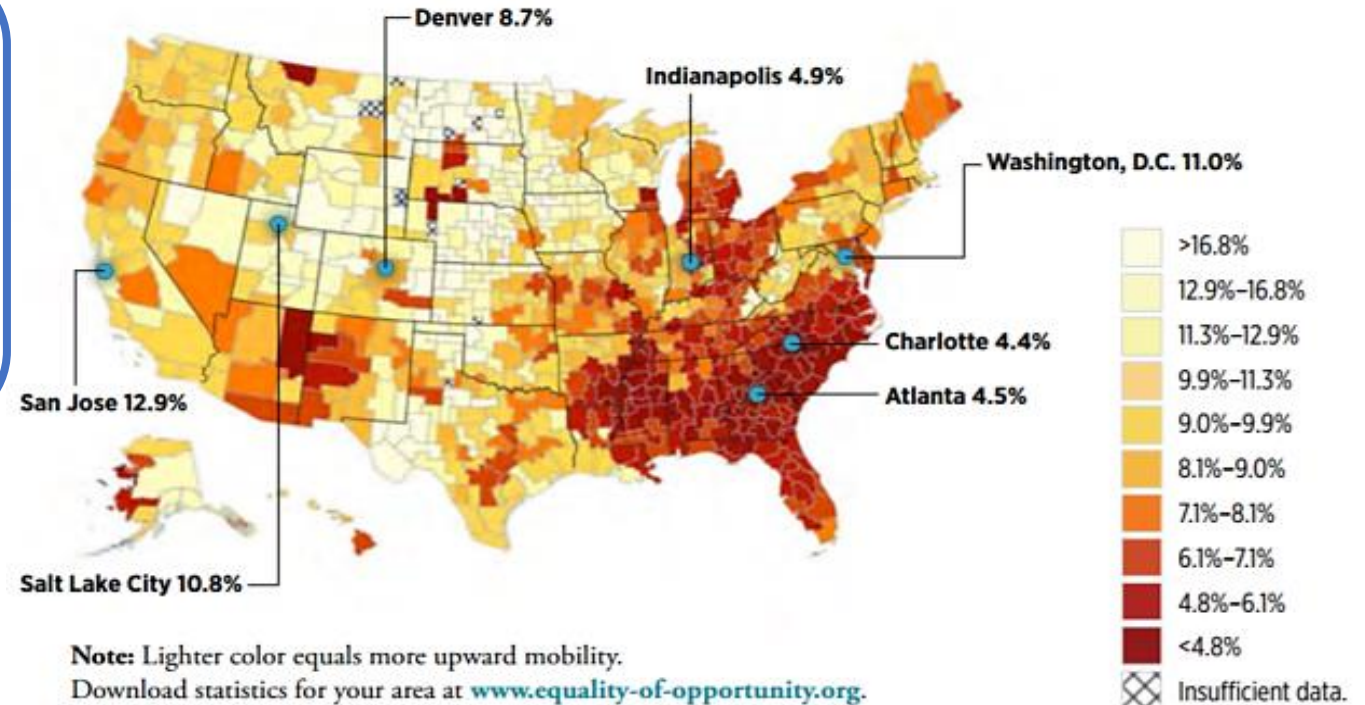
# The Map That Rocked Charlotte: The Chetty Study



Evan McGinn for The New York Times

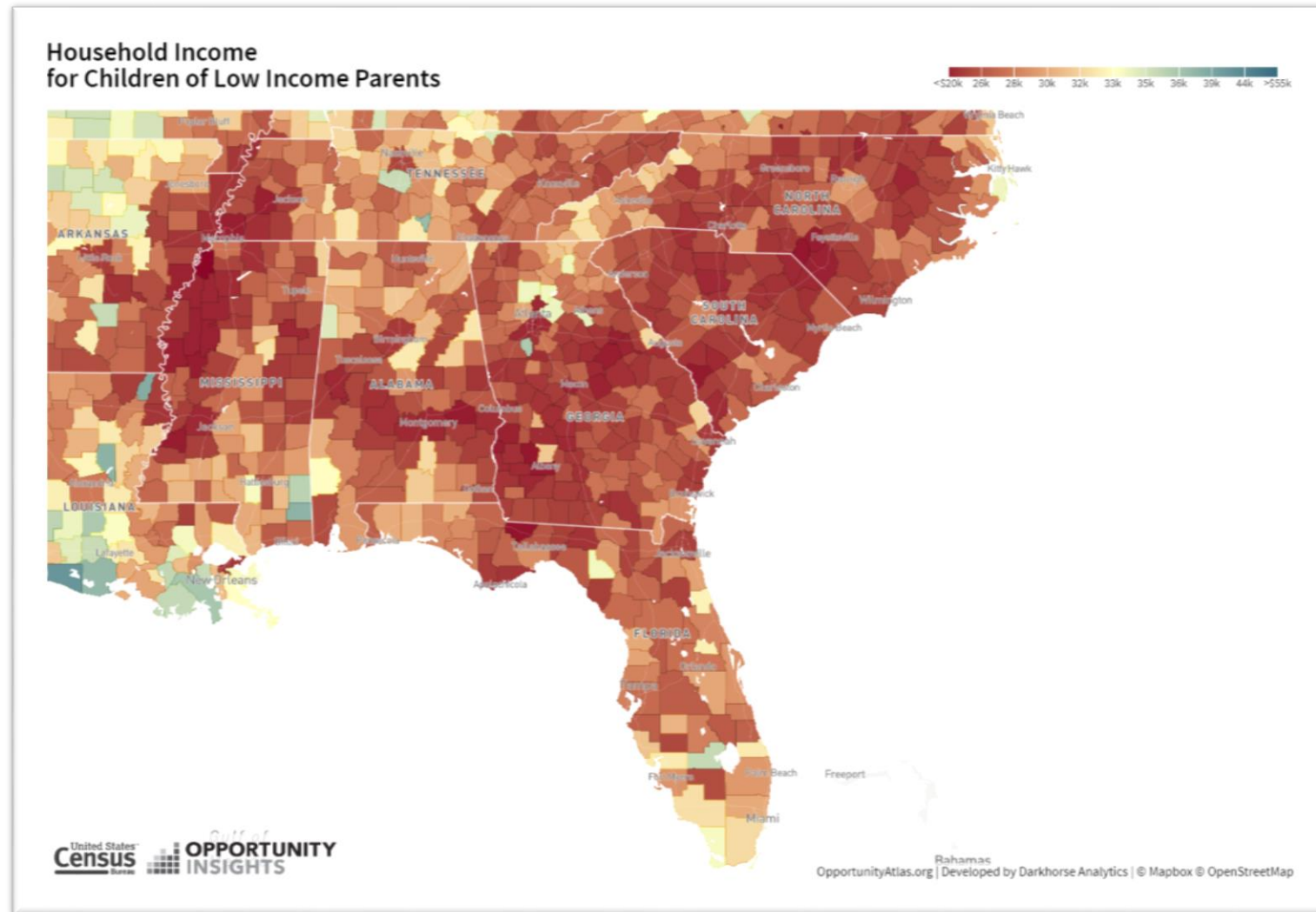
**Q:** *What are the chances for a child succeeding, independently of family status and where she grows up?*

The Harvard/UC Berkeley study ranked Charlotte 50<sup>th</sup> of 50 cities and Mecklenburg County 99<sup>th</sup> of 100 counties





# But, It's Not Just a Charlotte Issue

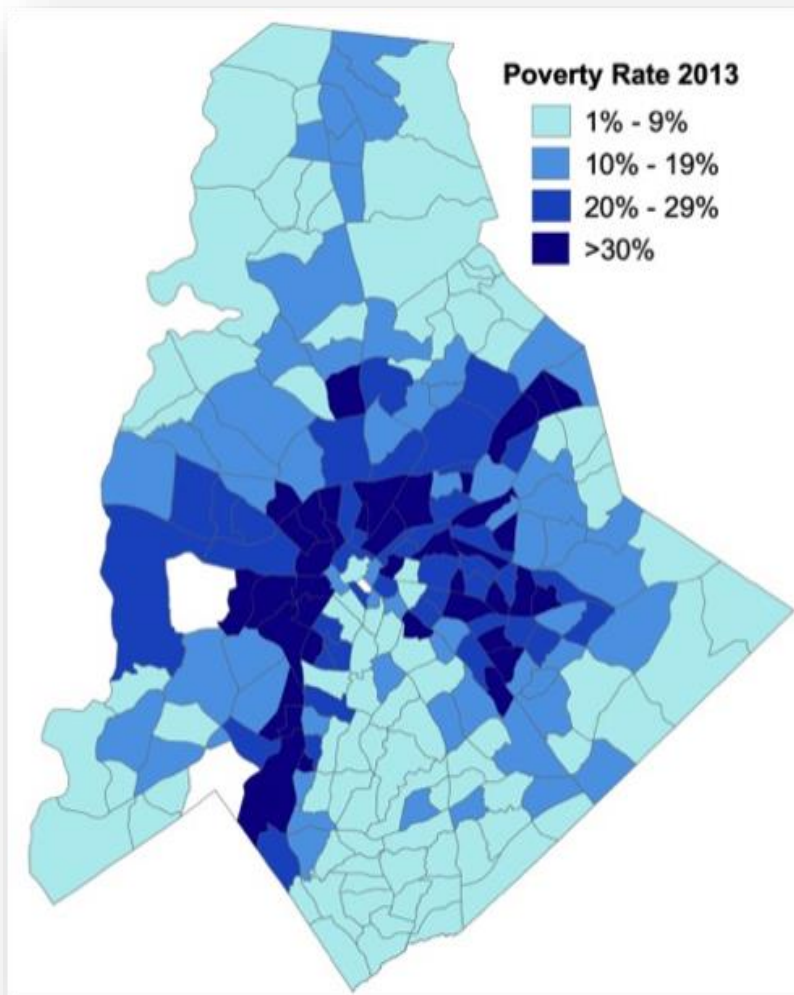




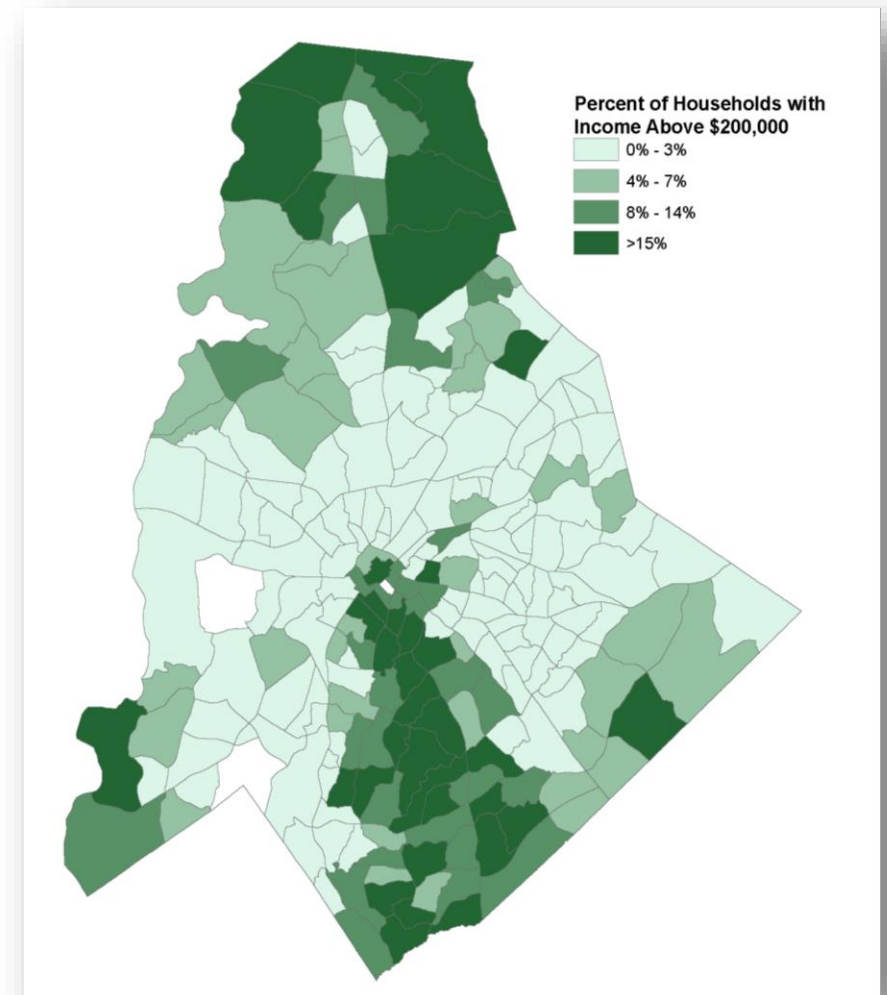
## Chetty: Five factors most predictive of upward mobility



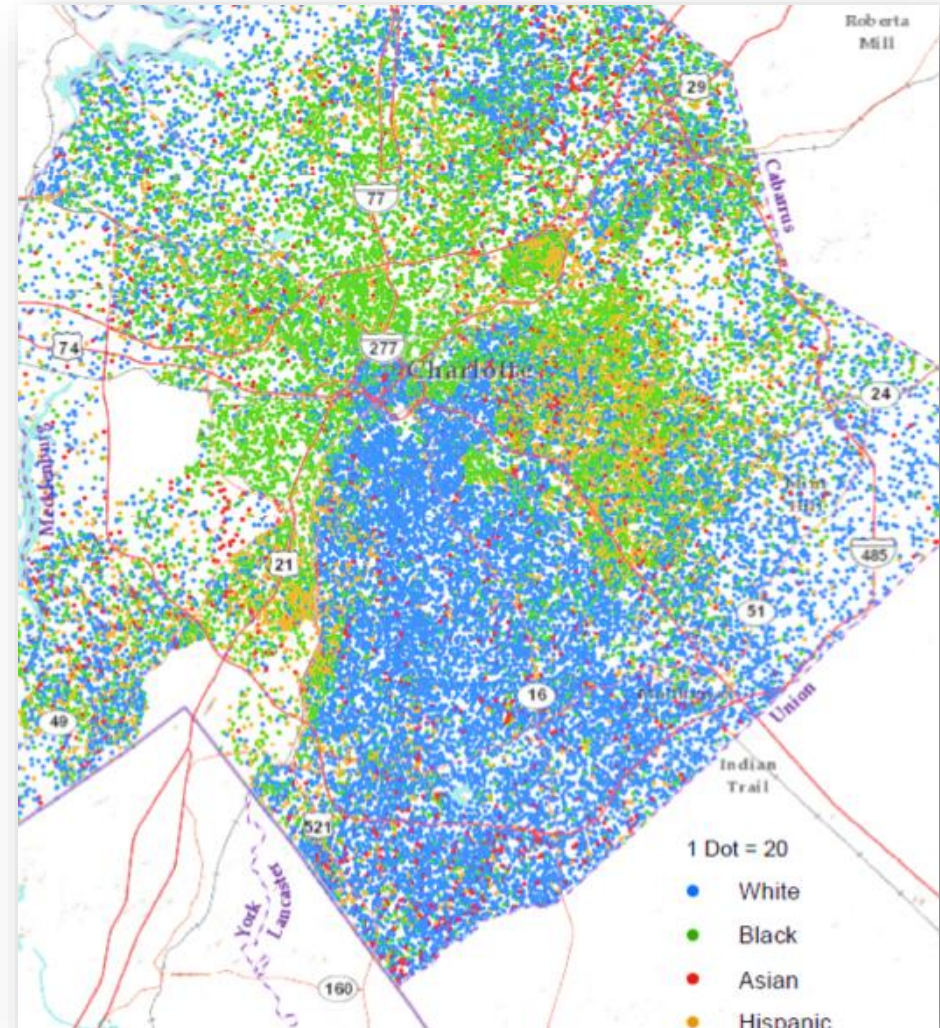




**Example:  
Charlotte  
segregated  
by income.**



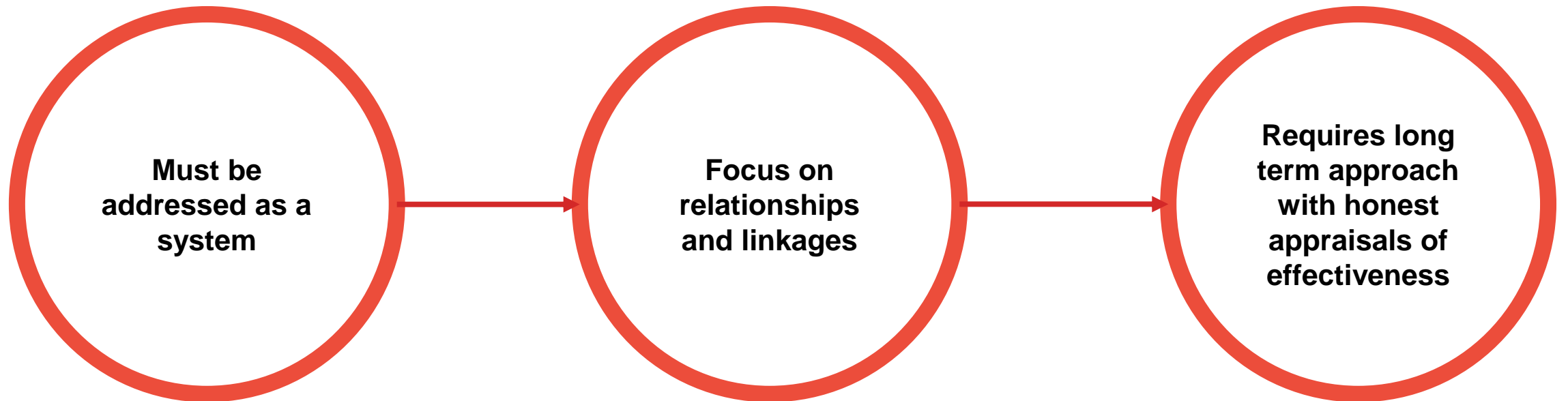
# Example: Charlotte segregated by race.







# Everything is interconnected



# Opportunity System Strategy

*For Children, Youth and Families*

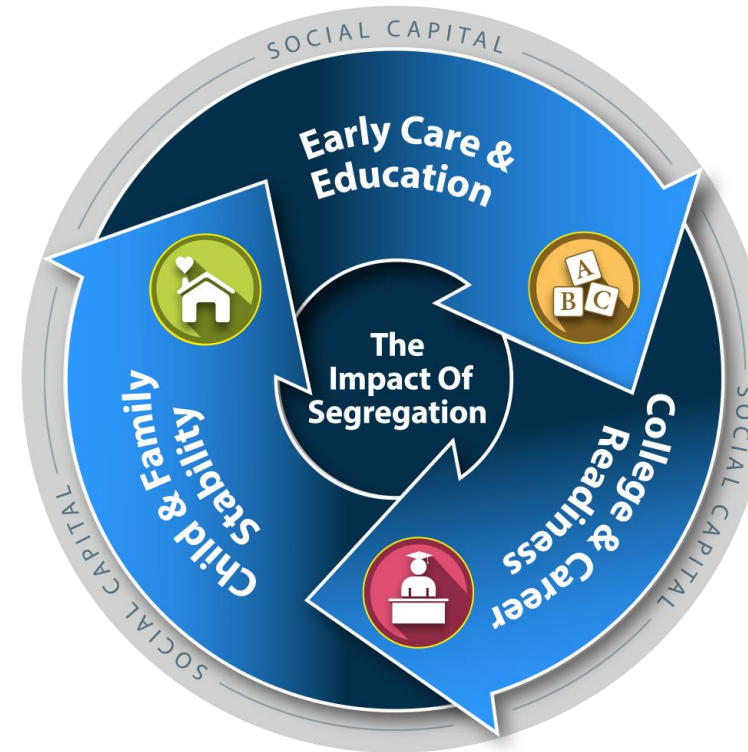


## Cross-Cutting Factors

1. Segregation
2. Social Capital

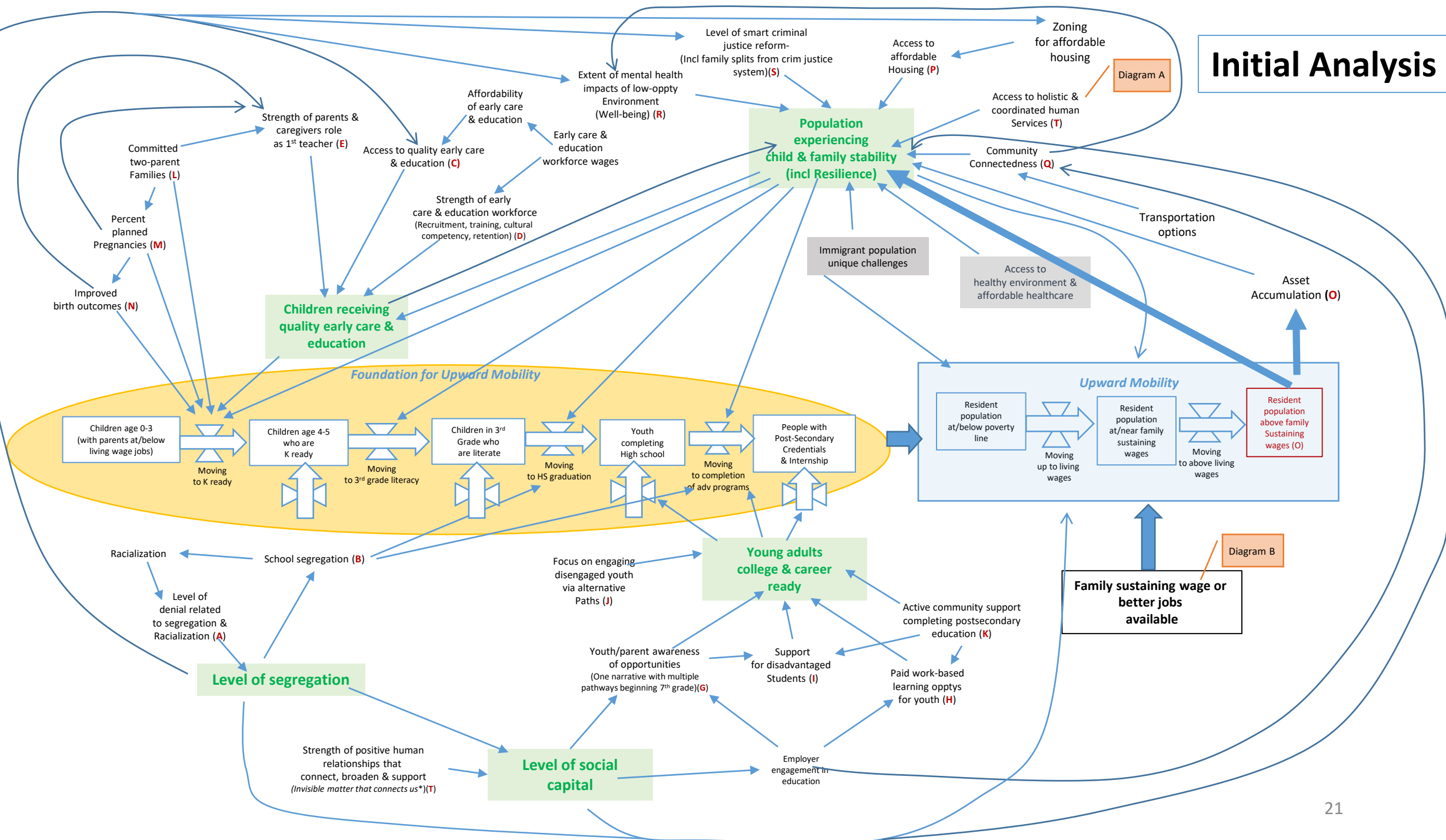
## Key Determinants

1. Early Care and Education
2. College and Career Readiness
3. Child and Family Stability





# Initial Analysis



# Systemic Theories of Change

- Strategy for implementing change over time
- Conventional theories of change are linear
- Systemic theories are circular
  - Mirror the circular ways in which social systems behave and evolve
  - Integrate critical variables and leverage points into a logical and sequenced set of actions
  - Identify short-term as well as long-term improvements
  - Point to leading and lagging indicators/metrics

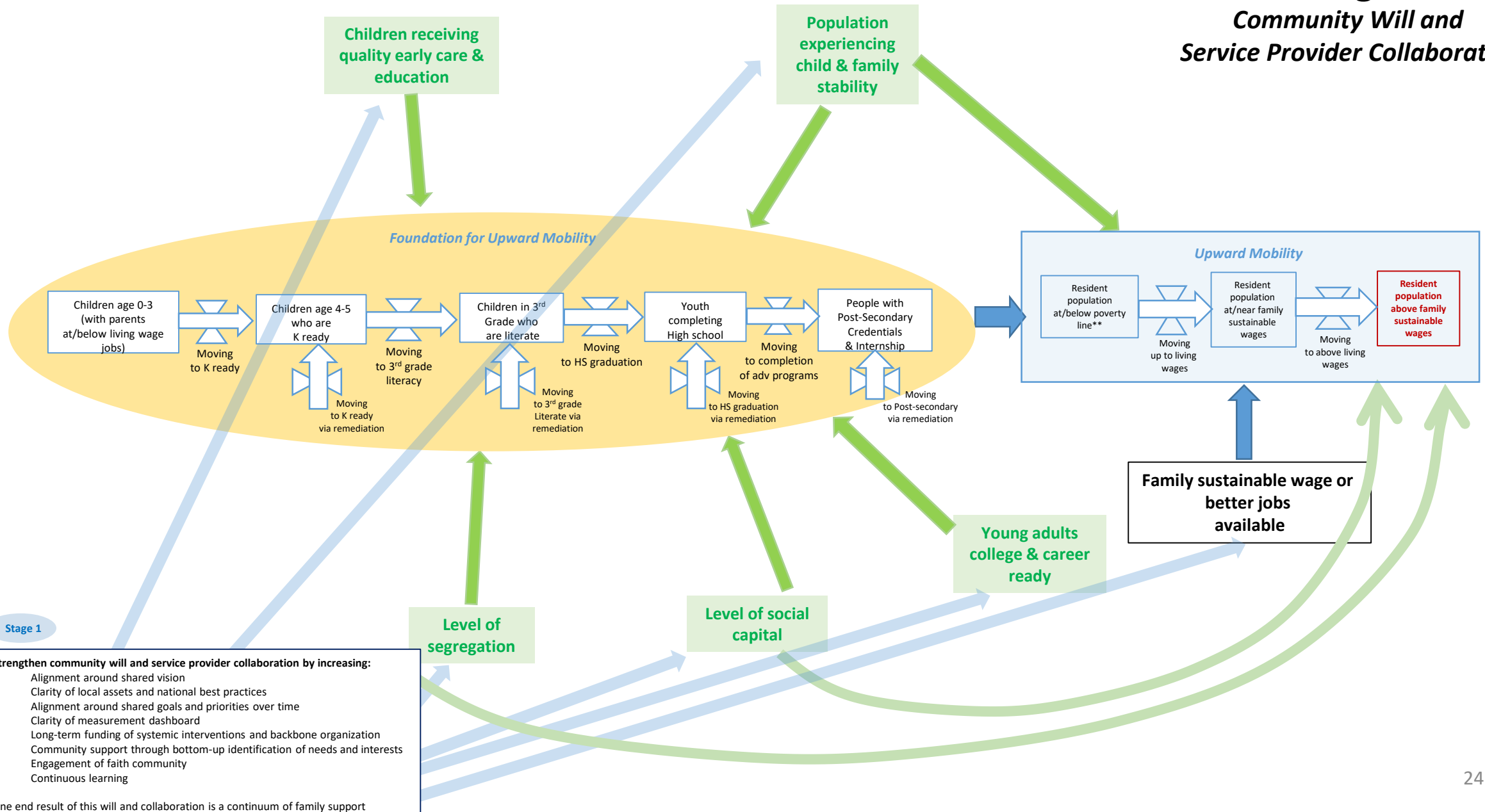


## Major Stages of Intervention

1. Increase level of community will and service provider collaboration
2. Focus initial systemic investments on selected strategies in each focus area
3. Reinvest dividends to collectively address additional strategies and achieve self-sustaining increases in upward mobility

Overall: Cultivate new mental models () in support of all of the above

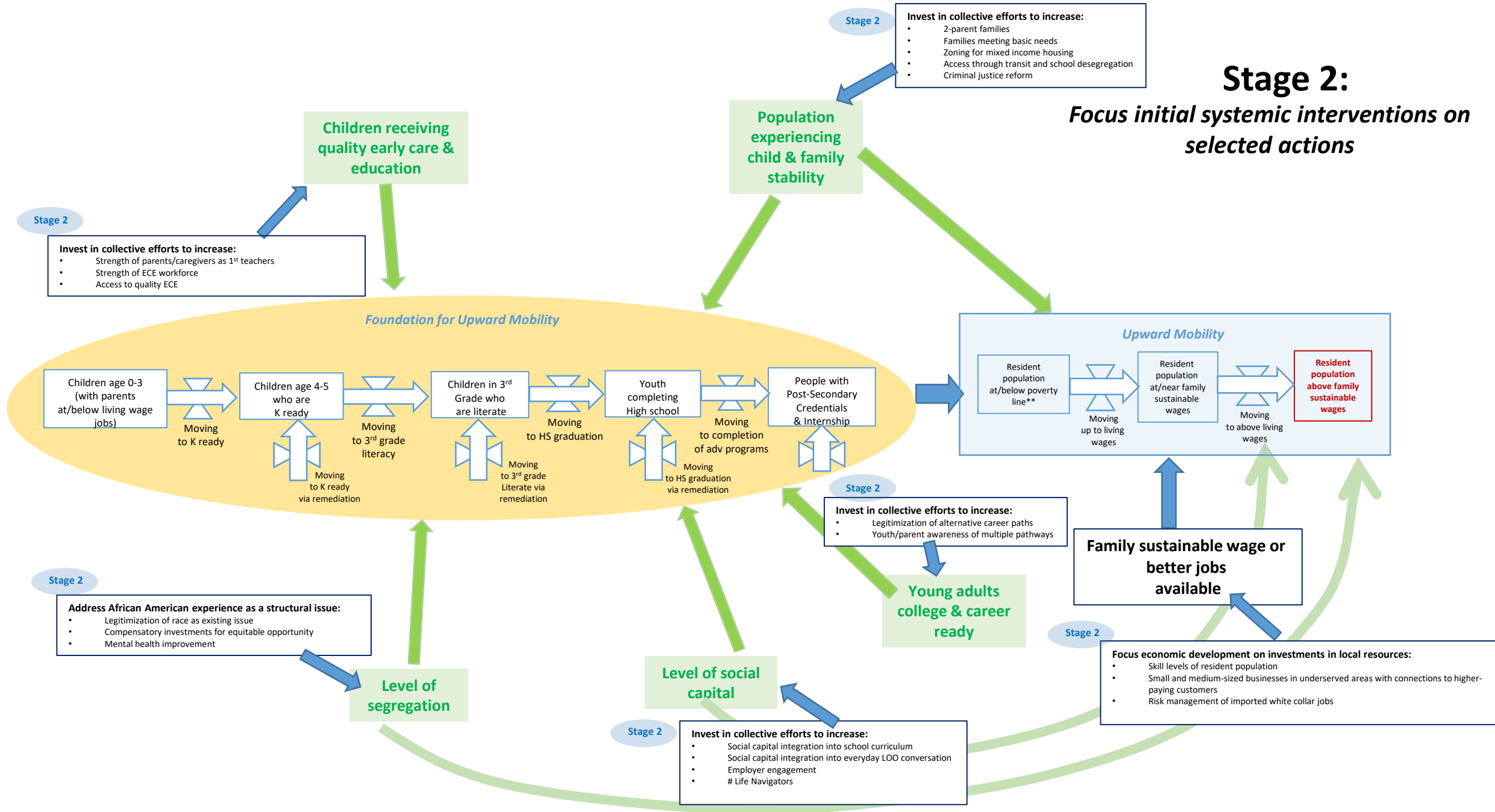
# Stage 1: Community Will and Service Provider Collaboration





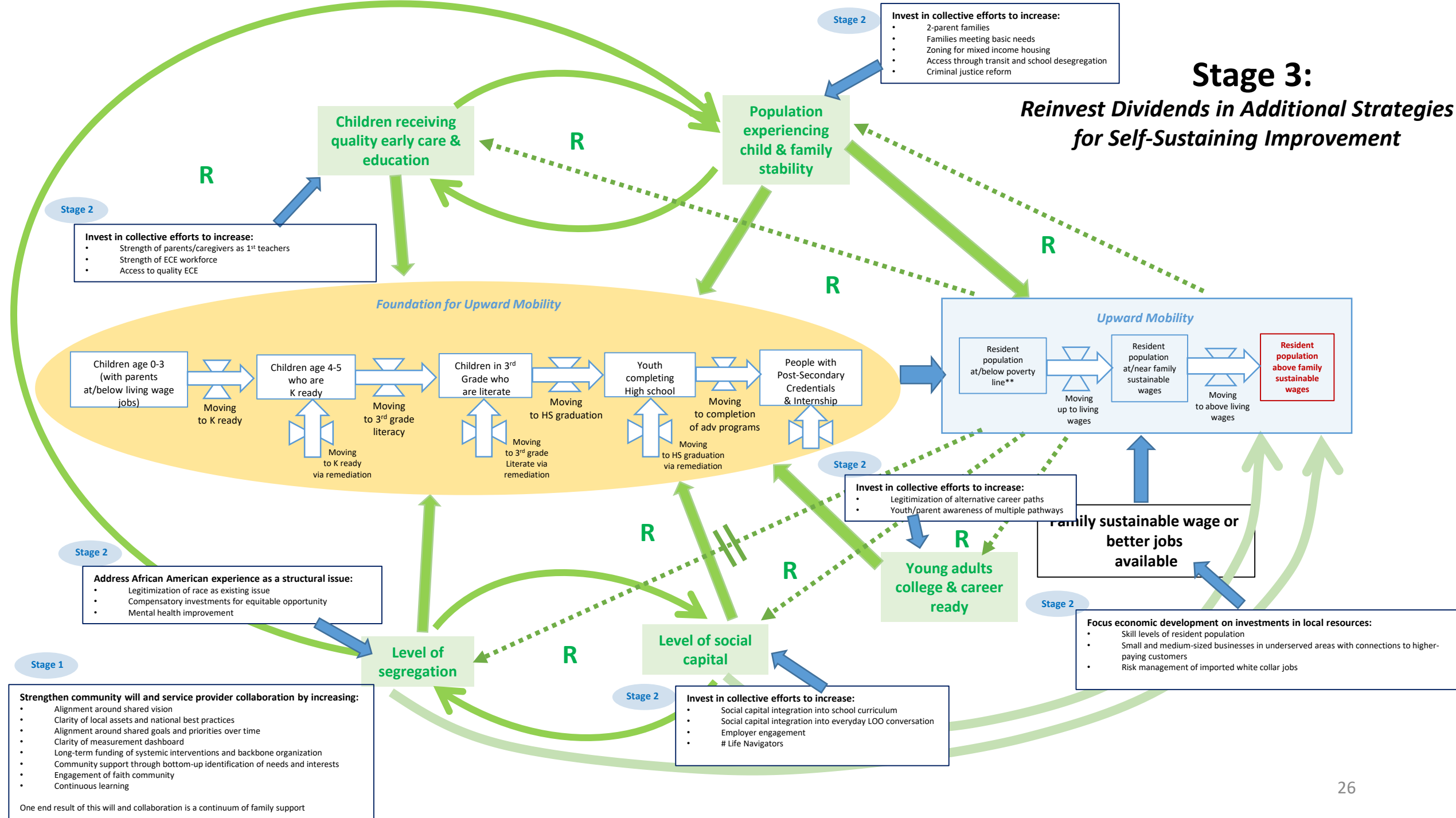
## Stage 2:

*Focus initial systemic interventions on selected actions*



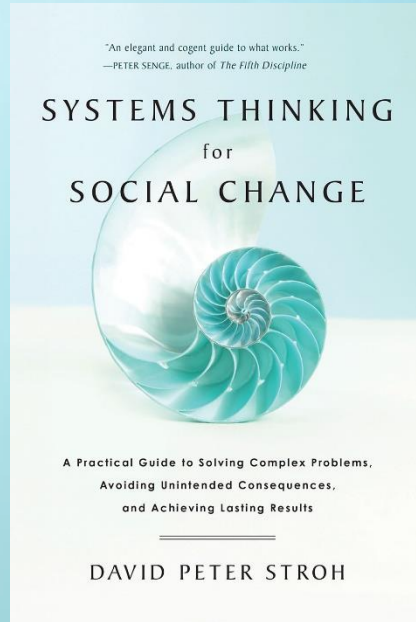
## Stage 3:

**Reinvest Dividends in Additional Strategies for Self-Sustaining Improvement**





# Additional Resources



David Peter Stroh, *[Systems Thinking for Social Change: A Practical Guide for Solving Complex Problems, Avoiding Unintended Consequences, and Achieving Lasting Results](#)* (Chelsea Green, 2015)

- <https://bridgewaypartners.com> and [www.appliedsystemsthinking.com](http://www.appliedsystemsthinking.com)
- Contact David at [dstroh@bridgewaypartners.com](mailto:dstroh@bridgewaypartners.com)
- Contact Brian at [bcollier@fftc.org](mailto:bcollier@fftc.org)