SMART CSOs

Workshop Report

14-15 May 2012
La Bergerie, France
What is the Smart CSOs Lab about?

The Smart CSOs Lab is an international network of civil society leaders, researchers and funders aiming to develop and put into practice strategies that embrace the cultural and systemic root causes lying behind the social and environmental crises of our times.

We believe civil society organisations have a crucial role to play in catalysing transformative social and economic change, yet new ideas and strategies are needed to address the challenges we face. Our current focus on single issues and short-term goals means that while we may win many battles, we are losing the war.

Our shared vision is to embrace the journey ahead of us as a Great Transition to sustainability similar in its dimension to the Industrial Revolution. This journey will require reinventing or fundamentally transforming many of our current political, economic and cultural institutions. It demands overcoming the dominant paradigm of economic growth as well as shifting from our current culture of consumerism to a culture where wellbeing is achieved through simpler living.

What was this workshop about and what happened?

This workshop was part of the Smart CSOs Lab learning process. In this learning process we aim to foster new connections and relationships between change agents (see ANNEX 2 for participant list), get inspirations for new CSO strategies toward the Great Transition, align our strategic thinking as well as develop ideas to start experimenting with in our own organisations.

If we want to seriously start working in an action experiment type way, we knew that we had to build up our own capacity about what this way of working involves from us. Martin Sandbrook (Director for Learning at the Schumacher Institute) is experienced in these methods and guided and facilitated us through this process (see ANNEX 8 for handout on action experiments).

In addition, the focal area of the workshop was to learn from theory and practice about ways we can develop effective strategies to support the emergence of a global movement for the Great Transition. We had Orion Kriegman (Tellus Institute) and Felix Kolb (Campact) with us to give us some inspirations from their academic and practical experience (see ANNEX 6 and 7 for readings).

Finally, we had invited Silke Helfrich from the Commons Strategies Group to give us inspirations about the Commons as a structural principle for the New Economy and to kick start a discussion on how it can be a useful concept for CSOs and for developing effective strategies for the Great Transition. See Silke’s blog for her reflections on the workshop: http://commonsblog.wordpress.com/2012/06/04/der-grose-wandel/the

In addition to the external input and the capacity building on action experiments, we structured the workshop in the following way:

Day 1: With the aim to develop a deeper shared understanding about what kind of issues and problems we want to address in our organisations and when thinking about campaigns for the Great Transition, we decided to learn from the key insights gathered previously in the Smart CSOs dialogue with regard to each of the three leverage points: global movement, new economy and cultural transformation. We split into three groups (three leverage points) and started to explore a range of questions to consider when starting experiments with new strategies and projects (for the GT). See ANNEX 3,4 and 5 for the three readings and the proposed questions and see below for the outcomes of these sessions: Outcomes of day 1.
Day 2: This preparation on day one clearly helped us to question our own assumptions and to start getting deeper into the question of what type of organisation does it require to be effective for the Great Transition and what type of campaigns and ways of working with people and other partners does it require to be successful change agents for the Great Transition. On day two we started to explore ideas for action experiments. The results of the discussion and the level of energy in the group clearly showed that we had reached a next level. Very interesting ideas were developed and what is even more important, the group showed a real enthusiasm to take the ideas forward and put them into practice in the coming months. See below for the results of the workshop: Key outcomes / action experiments explored.

Outcomes of day 1: When we start experimenting with new campaigns and with transforming our organisations to become fit for new strategies, what key questions should we consider?

(The questions were the outcomes of the group discussions. The text in italics was the reference text discussed by the groups.)

1) Effective CSO strategies to support the emergence of a global movement for the GT

a) Professionalisation of CSOs: One of the characteristics of current environmental CSO strategies is that mobilization of citizens is not seen as a major professional concern. Organisation of a grassroots movement and mobilisation of a green political movement have taken a subordinate role in comparison to policy advocacy and partnership work with governmental agencies and business. CSOs have been increasingly transformed from traditional participatory and democratic forms [Grassroots] into professional, oligarchic, and non-participatory organizations [Astroturf]. Despite the fact that the environmental movement still boasts a very mobilized membership base, the general trend has been the rise of the professional movement organization as the dominant form of political representation. This raises salient concerns about the viability of contemporary civil society as a site for effective citizenship and democratic action.

• How does my organization listen and engage with its members? How do we listen to other stakeholders and collaborators?
• How can we become a more participatory and democratic organization to play an important role in the emergence of a global movement for the GT?
• What does it mean for my organization to let go control? What would that look and feel like?

b) Supporting a global citizen movement for the GT: The increase of peoples’ activity over the past two decades suggests both the necessity and the possibility of the emergence of a Global Citizen Movement for the Great Transition. The necessity of a Global Citizens Movement becomes evident when we acknowledge that top-down change strategies do not work on their own, individuals are reluctant to act alone, and that there is a growing population of people forming communities of practice along new forms of consciousness and political culture. According to Paul Raskin, “The global transformation will require the awakening of a new social actor”. A Global Citizens Movement engaging masses of people, “nurturing values of human solidarity, ecological resilience and quality of life” is necessary and possible. This movement would “embrace diverse perspectives and movements as separate expressions of a common project”. However “it is unlikely that a global citizen movement will spontaneously emerge through bottom-up self-organization.”

• How can we find new forms of collaboration with civil society actors and social movements?
• How do we see the build up of a global citizens movement, what level is a good starting point and what can be the role of our organization?
• Could / does my organization allocate resources for community organizing?
• How can my organization use its trust and influence to inspire its members and a broader range of citizens towards becoming engaged in a global citizen’s movement for the GT?
• How can I get started experimenting with projects that support such a movement? Could my organization join or convene a multi-organisation campaign for the Great Transition

c) Understanding emergence: Emergence theory focuses on the process of how living systems begin as networks, shift to intentional communities of practice, and evolve into powerful systems capable of global influence. Reframing the long-held assumptions on the dynamics of organising social change, emergence asserts that hierarchy and control mechanisms are not the only form of organising and certainly not the most efficient. Self-organising networks, on the other hand, are held to be the pre-condition for emergence. A vital point is to understand the dynamics of networks and the lifecycle of emergence. With greater understanding of these dynamics change makers can experiment with nurturing networks to intentionally foster emergence. The four-stage model “Name, Connect, Nourish, Illuminate” developed by the Berkana Institute offers a promising blueprint of how CSOs can nourish networks towards emergence.

• Is my organization already committed to being active in the development of a Global Citizens Movement? Is this part of it’s core/explicit theory of change?
• Does your organization see itself as a catalyst for a Global Citizens Movement? If yes: Is your organization fit for this focus? Expertise in place?
• How ready is my group to embark on new forms of collaborative projects which are more suitable for the GT?
• How to overcome totally different contexts of member organizations? (COMMENT: in the case of umbrella-orgs or federally structured orgs)
• Is my organization able to:
  o convene / connect?
  o analyse / name?
  o fund, encourage / nourish?
  o social media, PR, outreach / illuminate?

2) Effective CSO strategies to support the emergence of the New Economy and its innovations

a) Supporting the emerging New Economy: Much of the current work in CSOs focuses on influencing national governments or international policy processes while other CSO strategies attempt to change the course of big business through high profile confrontational campaigns or friendly partnerships with corporations. However, current social, economic and political institutions are self-stabilising around status quo and reject tendencies for systemic change. Pure top-down approaches are no longer sufficient for solving global ‘wicked’ problems. They fail to acknowledge the reality and the limitations of the political economy. Studies show that innovation happens in niches protected from the dominant socio-economic system. Change agents who spread innovation by questioning mainstream worldviews and challenging entrenched attitudes play a fundamental role. In order to play a decisive role toward the GT, CSOs have to get more actively involved in the innovation and consolidation process towards the New Economy.
• What is common, in terms of criteria, to different ideas about the new economy? e.g., its structure, possible tools, the values of the private sector? In which area do we work most effectively?
• Do we force, or help, the private sector to change their values and to include a different, wider, set of stakeholders?
• Or is there a different set of values underlying new economic models? If so, what is this?
• How do we ensure that the new economy does not fall into the same traps as the current?
• Which project has the potential to be scaled up with the resources I have? How do I become powerful enough in the medium to short term to drive change in the face of powerful vested interest?
• Do we always select projects where we feel we have power, which suggests such projects are always small scale?
• Do we drive for a new economy, or change the existing one. This is a strategic choice, which all CSOs might make together. How do we share strategic choices across CSOs?
• What are our assumptions about power and power structures? What is the evidence?
• How can we map the dynamics of power structures so we are more explicit about how they work, where the leverage points are?

b) Constant experimentation and learning: No-one knows what policies will “work” in the emerging systems of economics, politics and social change that look set to dominate the future. There is no blueprint for change for the New Economy due to high complexity, but it will require constant experimentation and learning and exploring multiple pathways. For CSOs this could mean to get involved in new forms of public engagement as an open-ended process rather than just advocacy and trying to persuade everyone to share a single, pre-determined point of view.
• How do we break out of always wondering ‘which different strategy’? Why do we not do them all at once? How do we strategise more globally? We need space to analyse and share campaigns, honing our campaign to fit with others. We all become part of a collaborative strategy. We reduce fragmentation. We recognise that everyone’s different approaches, toward the same agreed end, are valid? How do we achieve the synergistic effect of such a collaborative approach?
• How do we raise awareness of all the different campaigns? Different topics, different issues, methods and tactics?
• How do we learn appropriately from what others are doing, sharing and respecting our diversity and recognising the strength of that diversity?
• How do we transcend competition between CSOs?
• How do we use each other’s strengths, accepting the value of the contribution of all CSOs and be conscious that this is what we are doing?
• How do we become more aware of our own context (world-view)? What makes sense to us but not to others (especially in other cultures?)
• How can CSOs be more credible, especially when widely seen as ‘spenders’ not ‘generators’ of money? CSO experience of economic activity is as ‘askers for money’ not as ‘makers of profit’?
• (Discussed at this point that making profit is not the only form of valid activity. Providing a service which someone is prepared to pay for is a more useful measure of worth).
- But if CSO activity is seen as valid, how can it become a role model? Do we need more experience of different forms of economic activity to be credible? How do CSOs become more confident in the validity of what they do?
- Re the second question under B (Can we start being more self-critical...), is this not relevant across all CSO activity? Are we conscious of the way we do things, the choices we make, our assumptions and beliefs?

c) Leverage points for systemic change: Much of the current policy and advocacy work of CSOs happens in silos and focuses on symptoms rather than root causes. The deeper connections between the different issues are often not seen sufficiently. Given the systemic and complex nature of so many of today’s problems, the responses through this silo / symptoms approach fail to deliver fundamental long-term solutions. For effective CSO strategies toward the GT it is necessary to identify more effective leverage points in the political and economic system that can support a more long-term systemic/institutional change.

- In relation to developing new opportunities, other sectors of the economy take a disciplined approach, developing clear proposals. They:
  - Identify possible opportunities
  - Validate through research and pilot experiments
  - Scale up from success using planned development
  - Invest in what shows the greatest leverage.

How can we, as CSOs, do the same?
- How do we become stronger, to be more effective? Joint actions, alliances, collaborations, diverse approaches with a single focus, agreed theme, issue or campaign? Our organisation is the best at X. We acknowledge the contribution of other actors in this. Collectively we achieve...
- How do we share values, making these more explicit, seeing our activity as diverse but based on a foundation of values in common?
- Are we clear about our assumptions? Have we made a conscious choice about whether it is better to aim for an entirely new version of an economy or to change the existing one, incrementally? What is our conscious choice?
- How much are we a part of, consciously or unconsciously, the dominant paradigm?
- How do we check that our assumptions and beliefs are shared by those we are working to benefit, e.g. if we are working in a different culture?
- How do we adjust our action experiment to address the specific local context and conditions?
- How do we make visible and build on effective experiments that are happening unseen (for example outside Europe)?
- How do we assess the maturity and effectiveness of a sector? For example, what tools has the sector collectively developed to increase its capacity? Compared to the Business or, say, the University sectors, the CSO sector has little infrastructure – in the form of standards, knowledge-exchange, management skills, evaluation of effectiveness of the sector as a whole etc. How do we leverage better collective tools to strengthen the sector and players within it? How do we build on where there is a strong narrative and this is being done well, for example as in the Climate Change sub-sector?
3) Effective CSO strategies to support the cultural transformation toward the Great Transition

a) The unconscious mind: CSOs have often put most of their efforts into making the scientific rational case for change with their different audiences. However, advances in psychological research of the last 30 years suggest an over-emphasis of (and reliance on) the role of the rational / conscious mind. The rational (scientific) arguments alone will not overcome political and cultural barriers. For CSOs to become successful in influencing our complex political, social and human systems, they need to draw more on, engage with and build on trans-disciplinary knowledge and insights from the social sciences. As Gus Speth said: “It is the age of the poets, philosophers and psychologists not the scientists and policy wonks who need to bring people on board.”

- Do we have the right structure / combination of people in the team (s)/ organizations for what should we do?
- Do we have the right audiences in mind? How to change?
- Should we focus more on the general public, as we will not be winning through policy/scientific arguments?
- Do we realize that people are more than "one person"? i.e a policy maker is a father who cares...Are we exploring that enough? How do we do this?
- Are we sufficiently experimenting and bringing in experiences? And how?
- How can we use creative communications as art, music, humour, literature...?
- How to raise /nurture empathy in our organizations?
- How to make sure we work in an environment as "Cathedral Builders" (highest vision and mission)?

b) Values in communication: Research shows that the more dominant materialistic / extrinsic values are, the more unhelpful a person’s behaviour will be with regard to bigger-than-self problems. However current CSO campaigns often appeal to extrinsic values and might reinforce the unhelpful values and mental frames.

- Are we sufficiently exploring intrinsic values and to appeal to those?
- Are we being the change we are advocating? What do we need to do?
- How to take people on a journey from extrinsic values (where they are at) to intrinsic?

c) Co-creation of the new narrative: A narrative by definition is deeply rooted in society, it is not a single story but consists of millions of stories narrated by millions of people. Narratives are stories about people’s lives and are a way to make sense of life. They are relentlessly altered by the interaction of people and across cultures and societies. Thus, a new narrative of the Great Transition cannot be ‘invented’ by communication departments of large CSOs. If CSOs want to play an important role in the societal process towards a new narrative, it will require new ways of engagement, which are much less controlling and more about co-creating, hosting, supporting...

- Can we identify stories "out there" that are part of GT and amplify / share "own"?
- How can we stimulate "run-away" narratives to emerge?
- What is the difference between enabling co-creation and enabling co-creation with the new narratives?
- How can we bring in other storytelling (historic mythology, tribal, religions, etc.) to GT
• How to identify the social practices that already embody the new narrative (the future is already there) and make them visible?

d) Experiential learning: The emergence of a new narrative cannot be only about dialogue and communication. Research shows that experiential learning plays an important role in the process of cultural transformation. Mental frames and behaviours are inter-dependent. Communication needs to be consistent with the basic underlying ideology embodied in everything CSOs do. It is important to embody the change they want to see.

• How can we create an enabling environment of experiential learning in our organizations?
• Which change makers can / should we identify to bring into this experiential learning / action?
• How can we bring the commons to contribute / inform the GT narrative?

Key Outcomes of the workshop (day 2): Action experiments explored

1. Organisational strategic development: Getting fit for change – a cross-sectoral approach for organisational strategic development

Peer review input-process strengthening our own work. Address the strategic strengths of our sector. How can we connect more broadly to social movements? Foster a conscious process about creating change. Breaking the way of working in niches. Look at each other’s processes, draw lessons learned… How can we ensure that there is much deeper understanding of what we are doing/ what is going on over there? Addressing the mindset and ensuring that we are aware of and connecting to and taking into account other ways of working. Identify what is needed to support other sectors.

(Joanna Maycock, Alison Tate, Leida Rijnhout, Meike Fink, Job van den Assem)

2. Civil society organisations in the new paradigm

As much as we need new economic models for the GT, we also need new structures and ways of working within civil society. The way CSOs are currently and traditionally shaped, resembles the old paradigm structure of our current economy. CSOs are structured and organized very similar to corporates, they compete with each other and they even apply very similar tactics like corporates (e.g. marketing tactics).

Areas for change in CSOs might include but are not limited to:

- Theory of change towards the GT
- Organisational design fit for a new paradigm
- Decision making models fit for a new paradigm
- Collaboration models fit for a new paradigm (e.g. co-developing joint top level and long term change theories/strategies between CSOs, instead of only collaborating on a campaign level)

(Rembrandt Zegers, Nicolas Krausz, Markus Power)
3. Circle governance and decentralisation
What are the decision-making processes organisations should use to align to GT? How can orgs tap into and represent the individual wisdom of their staff, volunteers, partners and supporters?
How can we deal with the resistance in NGOs to apply deeply democratic decision-making processes?
What if we try to apply the widening circles methodologies in NGOs, to allow people to identify common purposes, create circles and offer open spaces to connect and design decision-making processes that work for them?
How to change organizational processes within the Widening Circles campaign? (E.g. rename the coordination circle into catalyst circle. This aligns itself with the idea that it will dissolve if the circle widens. Apply open space technology to allow those purpose circles to emerge and connect in a less hierarchical way.)
(Orion Kriegman, Rafa Cobo, Marta Monteso)

4. CSOs as part of the Global Citizens Movement
Instead of MOBILISING a Global Citizens Movement we (CSOs) need to BECOME the Global Citizens Movement. What makes me (feel like) a Global Citizen? How can we create global citizenship as a common identity? There is a notion in the community of funders, willing to fund projects towards the GT, that CSOs are loosing relevance in this field, and funding of social movements might be the stronger leverage point.
(Markus Power)

5. How to engage environmental and development NGOs with the Commons approach?
How can environmental CSOs become a catalyst for change for the commons movement, towards the great transition / new economies?
How can we (CSOs, commons movement, and public audiences) co-create narratives and action on the Commons towards new economies, in ways that respond to peoples' current interests, needs and concerns?
How to democratise support and funding for socially controlled renewable energy production and distribution, leading to changes in modes of production and consumption?
How to engage broader audiences with the commons approach?
(Silke Helfrich, Luke Wreford, Uygar Ozesmi)

6. De-growth – facing the myth of decoupling
How can we engage environmental NGOs to work on the myth of decoupling?
Possible steps:
• Ask all departments of my organization: what would change in the day-to-day policy if the goal is degrowth?
• Build arguments to present / communicate „de-growth“ in a positive – and global – way. I.e., Develop proposals to: Communicate/Educate for/Develop parts of a narrative of de-growth.
• Organize workshops about post-growth economy for CSOs (making the transition concrete)
(Meike Fink, Olivier Consolo, Stefan Rostock, Wojtek Kalinowski, Felix Kolb, Tilman Santarius)
ANNEX 1: Agenda of the workshop

Day one – Getting prepared for effective CSO strategies for the Great Transition

Objectives of the day:
- To learn how we can contribute to and support the emergence of a global citizen movement for the GT.
- To learn which key questions we should consider for starting action experiments for new CSO strategies.

08:30 – 09:00 Introduction to the workshop

09:00 – 10:00 What is The Commons and how can we use this political concept for CSO strategies for the GT? Inspirations by Silke Helfrich (The Commons Strategies Group) and discussion.

10:30 – 12:00 How can CSOs support the emergence of a global movement for the GT? World café discussion with two short insights from theory and practice provided by Orion Kriegman (Tellus Institute) and Felix Kolb (Campact): Key questions to consider for CSOs that want to support the emergence of the global citizen movement for the GT.

11:45 – 12:45 Principles for action experiments. Presentation by Martin Sandbrook. The aim is to turn the insights about systemic CSO strategies we learn at this workshop into concrete experiments and strategies for taking back to our organisations. We learn about what is involved in an action experiment from the point of view of the person trying to make it happen.

14:00 – 17:00 When we start experimenting with new campaigns and with transforming our organisations to become fit for new strategies, what key questions should we consider? We are splitting into three parallel groups with 7 – 10 participants each. We will be looking at current practices and organisations and will answer the following questions (30 minutes coffee break in between):

Group 1 – What questions should we consider in our CSO strategies to support the emergence of a global movement for the GT? Distilling key insights from this leverage point (body of knowledge).

Group 2 – What questions should we consider in our CSO strategies to support the emergence of the New Economy and its innovations (new models)? Distilling key insights from this leverage point (body of knowledge).

Group 3 – What questions should we consider in our CSO strategies to support the cultural transformation that is needed for the GT. Distilling key insights from this leverage point (body of knowledge).

17:00 – 18:00 Synthesis: Comparing the results from the three groups we will conclude the key questions we want to consider when developing our own action experiments and strategies. The groups join again for the last session of the day in plenary.
Day two – Turning inspirations into actions

Objective of the day:
• To turn what we have explored in day one into concrete action experiments and strategies for taking back into our own organisations, looking at how we might learn to get from today to an emerging future.
• To learn about approaches to action experiments and how we can support each other in our individual actions.

08:30 – 09:00  Checking in & framing of the day

09:00 – 10:30  Exploring ideas for action experiments. Based on the questions concluded on day one each of us will suggest ideas for potential experiments for changing the organisation and strategies. We will compare, discuss and validate in groups. We will look at this from the perspective of:

• Internal transformation (of CSOs) – this includes building a new vision, a new internal narrative, capacity building, organisational development etc.
• External transformation (through CSOs) – this includes all external work: especially campaigns, supporting the creation of a new societal narrative, movement building etc.

11:00 – 12:30  Refining action experiments (AE) and building joint inquires. Input from Martin on how to begin an AE. Mature and refine our ideas for starting with experiments. Do we have shared inquires and how can we support each other on our individual endeavours? Group discussion.

13:30 – 14:15  How can the Smart CSOs Core Team support change agents with their AEs? Short presentation from the core team. Discussion in groups and Q&A.

14:15 – 14:45  What are my personal plans as I leave here? Solo thinking and feedback in small groups.

14:45 – 15:00  Checking out
## ANNEX 2: Workshop participant list

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<tr>
<th>Name</th>
<th>Organisation</th>
<th>Position</th>
<th>Country</th>
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<tbody>
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<td>Cobo, Rafael</td>
<td>Fundación Hazloposible</td>
<td>Social innovator</td>
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<td>Consolo, Olivier</td>
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<td>Fink, Meike</td>
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<td>Helfrich, Silke</td>
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<td>Writer / Blogger / Member Commons Movement</td>
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<td>Kolb, Felix</td>
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ANNEX 3: Reading for breakout group 1 (Monday afternoon): Effective CSO strategies to support the emergence of a global movement for the GT

a) Professionalisation of CSOs: One of the characteristics of current environmental CSO strategies is that mobilization of citizens is not seen as a major professional concern. Organisation of a grassroots movement and mobilisation of a green political movement have taken a subordinate role in comparison to policy advocacy and partnership work with governmental agencies and business. CSOs have been increasingly transformed from traditional participatory and democratic forms [Grassroots] into professional, oligarchic, and non-participatory organizations [Astroturf]. Despite the fact that the environmental movement still boasts a very mobilized membership base, the general trend has been the rise of the professional movement organization as the dominant form of political representation. This raises salient concerns about the viability of contemporary civil society as a site for effective citizenship and democratic action.

- How hierarchical is my organisation? Do we need to become a more participatory and democratic organisation to play an important role in the emergence of a global movement for the Great Transition? If yes, what are ways to approach such a change?

b) Understanding emergence: Emergence theory focuses on the process of how living systems begin as networks, shift to intentional communities of practice, and evolve into powerful systems capable of global influence. Reframing the long-held assumptions on the dynamics of organising social change, emergence asserts that hierarchy and control mechanisms are not the only form of organising and certainly not the most efficient. Self-organising networks, on the other hand, are held to be the pre-condition for emergence. A vital point is to understand the dynamics of networks and the lifecycle of emergence. With greater understanding of these dynamics change makers can experiment with nurturing networks to intentionally foster emergence. The four-stage model “Name, Connect, Nourish, Illuminate” developed by the Berkana Institute offers a promising blueprint of how CSOs can nourish networks towards emergence.

- How ready is my organisation to embark on new forms of collaborative projects more suitable to the emerging nature of the Great Transition than hierarchical mechanisms?
- Which are possible roles for my organisation in the ‘life cycle of emergence’?

c) Supporting a global citizen movement for the GT: The increase of peoples’ activity over the past two decades suggests both the necessity and the possibility of the emergence of a Global Citizen Movement for the Great Transition. The necessity of a Global Citizens Movement becomes evident when we acknowledge that top-down change strategies do not work on their own, individuals are reluctant to act alone, and that there is a growing population of people forming communities of practice along new forms of consciousness and political culture. According to Paul Raskin, “The global transformation will require the awakening of a new social actor”. A Global Citizens Movement engaging masses of people, “nurturing values of human solidarity, ecological resilience and quality of life” is necessary and possible. This movement would “embrace diverse perspectives and movements as separate expressions of a common project”. However “it is unlikely that a global citizen movement will spontaneously emerge through bottom-up self-organization.”

- What is the appetite in my organisation to support the emergence of a global citizen movement for the GT?
- How can we overcome barriers of collaboration with other organisations and other CSO sectors? How could collaboration look like?
- Can my organisation provide resources and expertise to such a movement? If so how can we become engaged?
- Can my organisation use its trust and influence to inspire its members and broader range of citizens towards becoming engaged in a global citizen movement for the GT?
- How can I go about this? How can we get started experimenting with projects and campaigns that support such a movement? What would be suitable approaches?
ANNEX 4: Reading for breakout group 2 (Monday afternoon): Effective CSO strategies to support the emergence of the New Economy and its innovations

a) Supporting the emerging New Economy: Much of the current work in CSOs focuses on influencing national governments or international policy processes while other CSO strategies attempt to change the course of big business through high profile confrontational campaigns or friendly partnerships with corporations. However, current social, economic and political institutions are self-stabilising around status quo and reject tendencies for systemic change. Pure top-down approaches are no longer sufficient for solving global ‘wicked’ problems. They fail to acknowledge the reality and the limitations of the political economy. Studies show that innovation happens in niches protected from the dominant socio-economic system. Change agents who spread innovation by questioning mainstream worldviews and challenging entrenched attitudes play a fundamental role. In order to play a decisive role toward the GT, CSOs have to get more actively involved in the innovation and consolidation process towards the New Economy.

• How much of my organisation’s current work is focussed on moving/changing the current dominant political institutions to solve the issues my organisation cares about? How much is my organisation working with / supporting the real change agents developing the seeds of the new economy?
• If the emerging new system requires more support, what would it need to develop strength towards the New Economy and how could my organisation contribute?
• Does my organisation need to develop internal capacity on new economic thinking and if so how can new economics thinking be integrated into my organisation’s strategy and vision?

b) Constant experimentation and learning: No-one knows what policies will “work” in the emerging systems of economics, politics and social change that look set to dominate the future. There is no blueprint for change for the New Economy due to high complexity, but it will require constant experimentation and learning and exploring multiple pathways. For CSOs this could mean to get involved in new forms of public engagement as an open-ended process rather than just advocacy and trying to persuade everyone to share a single, pre-determined point of view.

• How open is my organisation to new forms of leadership that are less expert and advocacy driven and more open for inquiry and learning? Is there resistance to become less controlling as an organisation? How can we overcome this resistance and how can we learn the new ways of working?
• Can we start being more self critical about our past achievements and about not knowing all the solutions? What about asking new questions?
• Is there a role for my organisation in supporting local initiatives and facilitating learning exchange for the new economy or in initiating/engaging in sector-wide systemic innovation processes and if so which role?

c) Leverage points for systemic change: Much of the current policy and advocacy work of CSOs happens in silos and focuses on symptoms rather than root causes. The deeper connections between the different issues are often not seen sufficiently. Given the systemic and complex nature of so many of today’s problems, the responses through this silo / symptoms approach fail to deliver fundamental long-term solutions. For effective CSO strategies toward the GT it is necessary to identify more effective leverage points in the political and economic system that can support a more long-term systemic/institutional change.

• Do we need to build capacity on systems thinking in my organisation to become capable of working in a more systemic way and if so how?
• What are some of the promising innovations for the New Economy (e.g. happening at the grass root level) that would benefit from scaling and diffusing? Could my organisation play a useful role in this?
• Which could be some effective leverage points that could potentially trigger a shift toward the New Economy? Are there windows of opportunity (potential for enough political will) in the current policy scenario where my organisation could play a role?
• Can my organisation start experimenting with campaigns scanning and targeting strategic policy opportunities for the New Economy and if so how.
ANNEX 5: Reading for breakout group 3 (Monday afternoon): Effective CSO strategies to support the cultural transformation toward the Great Transition

a) The unconscious mind: CSOs have often put most of their efforts into making the scientific rational case for change with their different audiences. However, advances in psychological research of the last 30 years suggest an over-emphasis of (and reliance on) the role of the rational / conscious mind. The rational (scientific) arguments alone will not overcome political and cultural barriers. For CSOs to become successful in influencing our complex political, social and human systems, they need to draw more on, engage with and build on trans-disciplinary knowledge and insights from the social sciences. As Gus Speth said: “It is the age of the poets, philosophers and psychologists not the scientists and policy wonks who need to bring people on board.”

• How about my organisation and our own campaigns? Are we falling into this trap? How are we responding to these insights?

b) Values in communication: Research shows that the more dominant materialistic / extrinsic values are, the more unhelpful a person’s behaviour will be with regard to bigger-than-self problems. However current CSO campaigns often appeal to extrinsic values and might reinforce the unhelpful values and mental frames.

• Are we sufficiently considering the trade-offs between the tactical short-term benefits of appealing to extrinsic values and unhelpful frames (e.g. economic growth, nationalism) and the potential long-term harm these tactics might cause?
• Do I know the frames we use in our campaigns, policy work and fundraising? Are we trying hard to consistently use frames that appeal to non-materialistic and non-nationalistic (etc.) values?
• Can we find ways to not sacrifice authenticity (+long-term strategy) for the sake of short-term tactics?

c) Co-creation of the new narrative: A narrative by definition is deeply rooted in society, it is not a single story but consists of millions of stories narrated by millions of people. Narratives are stories about people’s lives and are a way to make sense of life. They are relentlessly altered by the interaction of people and across cultures and societies. Thus, a new narrative of the Great Transition cannot be ‘invented’ by communication departments of large CSOs. If CSOs want to play an important role in the societal process towards a new narrative, it will require new ways of engagement, which are much less controlling and more about co-creating, hosting, supporting…

• What is the appetite / what are the possibilities in my organisation to be part of a wider process of co-creation of a new narrative (rather than creation)?
• What would be suitable roles for my organisation in this cultural transformation process?
• Can my organisation start to engage in a participatory development and the dialogue around a new narrative (e.g. create spaces for dialogue)?
• What would that mean with regard to the need for internal change? How could internal resistance / blockages be overcome? Would it be suitable to start a small-scale niche experiment?

d) Experiential learning: The emergence of a new narrative cannot be only about dialogue and communication. Research shows that experiential learning plays an important role in the process of cultural transformation. Mental frames and behaviours are inter-dependent. Communication needs to be consistent with the basic underlying ideology embodied in everything CSOs do. It is important to embody the change they want to see.

• Does my organisation embody and live the values we say we want to see?
• Are we authentic and consistent in everything we do and in all our operations with regard to the transformation we want to see in the world? If not, where can we start changing things?
• Are our policy, advocacy and fundraising work consistent with the cultural change we propose? Are there opportunities to consider more strongly our influence on (government) policy and the feedbacks policy can create on culture?
ANNEX 6: Reading “How can CSOs support the emergence of a global movement for the Great Transition?”
Two tentative answers by Felix Kolb, Campact

What is a Social Movement?

A social movement is a mobilized network of groups and individuals which aims at achieving or preventing social, political or economic change at least partly relying on protest tactics.

I. Create a Master Frame about the Great Transition

Framing theory is one of the core paradigms within the social movement literature. It postulates that social, political or economic grievances will not automatically transform into protest or rebellion. Rather academics and activists have to create and to establish interpretations of these grievances that encourage activism. Effective frames are considered to consists out of three integrated parts:

- A diagnostic framing that clearly identifies the problem and which I consider relatively well articulated in case of the GT movement.
- A prognostic framing that outlines how the problem can be overcome in the long run and what steps have to be taken immediately. This part of the GT master frame I consider as being to vague.
- A motivational framing that convinces ordinary people that they should become part of the movement and that they can make a meaningful contribution to the movement goals.

Most social movements - and certainly the GT - have to use a variety of frames for different campaigns or other purposes. However in the best case all of these frames can be linked and are resonating with a master frame. Of course every frame and in particular a master frame cannot be dictated by a single person or organization and will be constantly in process of renegotiation.

II. Move from Theory to Conflict

A well-articulated master-frame based on sound theory might be a necessary condition for the emergence of a social movement. However, it is certainly not a sufficient condition. Social movements emerge, grow and develop around often highly publicised and certainly highly politicized conflicts. This is most obvious for single-issue movements as the anti-nuclear energy movement.

However, I argue that multi-issue movements as the environmental movement or the global justice movement also emerged around a limited or maybe even symbolic conflict. For example the global justice movement (at least in many European countries) rallied around the call for the regulation of financial markets and called for the tobin tax and the closure of tax havens.

As long as the GT movement is seen as a merely theoretical enterprise which will not have any practical political or economic ramifications it will neither attract sufficient media attention nor large number of activists. That means the GT movement has to find a campaign issue, which is controversial but cannot easily become portrayed as utopian.

I suggest to think about a campaign that calls for legal restriction on commercial advertisement. In a first I would focus on advertisement that target children and on advertisement in the public domain. I think in the former case it is relatively easy to win the public argument that this form of advertisement is pure manipulation. The latter would allow local groups to wage their own campaigns. Maybe an anti-advertisement campaign is not the best or even a good approach to build the GT movement. However, I am convinced that the GT movement needs a to start a controversial campaign to grow.
ANNEX 7: Reading “How can CSOs support the emergence of a global movement for the Great Transition?”

Input by Orion Kriegman, Tellus Institute

Context: Are recent citizen actions harbingers of global solidarity?

During the current crisis of the globalized economy we have witnessed an up swell in citizen led protests against austerity measures, inequality, and government corruption. Riots in Greece, the UK and other European countries, student protests over university fees, the Arab Spring, the Spanish Indignados, the American Occupiers, have all been national reactions to problems framed largely in national terms focused on national political and corporate elites. And yet, they have explicitly referenced and drawn inspiration from each other, and activists communicate among each other across national boundaries through the Internet, as well as making face-to-face trips in solidarity with each other. While it is possible that this represents “international solidarity” rather than “global solidarity”, a latent potential seems to crackle and course through this historic moment, is all this activity the harbinger of a global movement of global citizens demanding a more just and sustainable planetary society?

Still, we must also note during this same time period the rise of the Tea Party in the US, reactionary anti-immigrant parties in Europe, Islamist movements, and other grassroots groups that do not embody Great Transition values. There are many forces and ideologies actively vying to shape the future as existing institutions are delegitimized by deepening systemic shocks. As enticing as it is to assume that a truly global movement for a Great Transition already exists, we must be careful not to project our desires ahead of reality.

Many activists and authors talk about a “movement of movements” referring to the many social movements active on a global level from human rights, climate change, labor, food sovereignty, anti-poverty, and the list goes on and on. In practice these varied movements can be at odds with each other disagreeing over tactics, strategies and core values. At times, organizers have successfully created actions (typically reacting to official events such as COP 15) and forums (the World Social Forum being the largest and most prominent example) in which various movements have gathered.

Many active in these various social movements lament the inability to be more proactive and collaborative. “Issue-silos” continue to promote fragmentation. While some glorify this state of affairs, and others presume that organically over-time it will correct itself, still large numbers of thoughtful and committed activists seek a greater degree of unity. A global movement for a Great Transition has been posited as a framework within which multiple actors, organizations and causes can ally – a big tent for those who seek a life-sustaining civilization of Earth.

Need: To move from international fragmentation to global collaboration

At the Tellus Institute we like to talk about the “push” of necessity and the “pull” of desire as both essential conditions for the emergence of global solidarity. Large NGO’s have an opportunity to play a catalytic role at this crucial historic juncture by telling the story of the Great Transition such that people begin to see themselves as part of a shared community of fate intrinsically linked to the wellbeing of all life and Earth as a planetary system (i.e., New Narrative). In addition to this, NGO’s can highlight ongoing experiments and initiatives that already support the building of alternatives for a Great Transition (i.e., New Models). Both these efforts help people believe in the potential for a positive future and thus fuel the pull of desire toward a just and sustainable planetary civilization.
Beyond this is the question of how best to directly support a burgeoning/latent global movement of global citizens proactively building democratic institutions for a planetary age?

Experiments: Campaigns to Enlarge and Strengthen a Global Citizens Movement

Marshall Ganz (who worked for 16 years with United Farm Workers and now sits at Harvard’s Kennedy School), talks of campaigns as the key method for recruiting leadership and building community. Campaigns typically build from punctuated moments of smaller victories on the pathway to a larger objective, with each victory mobilizing more resources and people sitting on the sidelines getting involved as they sense the momentum of success. Thus campaigns require well defined objectives and often target those capable of addressing specific grievances in a rolling wave of reform that can lead to deeper change. This thinking is familiar to many of us and part of our work, in a social movement context a standard example might be Gandhi’s campaigns.

Organizing effective campaigns for reform are what many large NGO’s are practiced in and the challenge now is to shift toward campaigns that can leverage systemic change. Movement diplomats\(^1\) could help build coalitions for such efforts.

One experiment in progress is the Widening Circle Campaign, of which incidentally Smart CSO’s is a driving actor, along with Tellus Institute, Pachamama Alliance, Earth Charter, IBASE in Brazil, CEE in India, Forum for a new World Governance, FPH, and a widening circle of allies. The goal is by the end of 2012 to convene a truly global dialogue of key actors from the North and South to explore how best to enlarge and strengthen a global citizens movement for a Great Transition. Other experiments are needed.

Conclusion: Politics of Trust – moving beyond false polarities

We often get stuck in stale arguments about Global vs. Local scales of action, or Bottom-up vs. Top-down approaches. I would like to end by asserting that it is time to move to a “both and” frame so we can expand our creative thinking together. Following are some key elements to consider:

Identity? Global and Local – humans are dynamically multi-dimensional and just as national identity did not eliminate regional, ethnic, gender or other dimensions of identity, a new identification with Earth-as-a-whole would transform but not necessarily subsume other identities. We are both global and local.

Narrative? Immediate Grievance and Long-term Vision – social movements mobilize large participation in reaction to immediate grievances (e.g., student debt, foreclosures, ending war, the

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\(^1\) Movement diplomats...would complement civil society’s paid staff, charismatic visionaries, influential philanthropists, community organizers, and organizational heads. Trained and supported directly by organizations or communities, these diplomats would be charged with the task of building systemic coalitions. They would seek to translate the rhetoric of different factions, foster communication, and find common ground. They would provoke learning in their own organizations in addition to reaching out to form alliances. Ideally, this new evolution in leadership would include core competencies of facilitation, strategic dialogue, systems thinking, and familiarity with future scenarios and the requirements for a sustainable world. This new role of leadership would not replace other necessary types of leadership, but would complement them in helping to maintain the balance between coherence and diversity within a Global Citizens Movement. This difficult work of diplomacy, often unglamorous and contentious, could become a highly respected and influential form of leadership. If such roles are given recognition and support, a network of movement diplomats and diplomatic training programs could help a systemic movement overcome barriers of language, class, region, and outdated “issue-silos”. It would be the work of these diplomats that spaces for engaged dialogue would be developed, multiplied, and enhanced. Movement diplomats could be a key to developing coherence while avoiding the evolution of stultifying movement hierarchies. (for further background see: Kriegman, Orion and John Wood. 2008 “Dawn of the Cosmopolitan: the Hope of a Global Citizens Movement” (in Journal for Global Initiatives 3(1) pp. 7-32).
right to vote), but these grievances are usually embedded in narratives that highlight core values of justice and posit a vision of a better world.

Strategy? Proactive and Reactive – Joanna Macy talks about a frontline of activism in which people chain themselves to trees, or link arms around a neighbour’s house to prevent evictions. This is hard work and often leads to burnout. Equally important are efforts to build alternatives, such as worker cooperatives, credit unions, or other institutions of community power. We need strategies for both proactive alternative builders and reactive first responders.

Linkages? Bottom-up and Top-Down – we need action at all levels. We need top-down policy changes as well as bottom-up community initiatives and everything in between. One level of action is not more legitimate, urgent or necessary, rather the linkages between levels and the accountability in relationships of actors at different levels is the crucial dilemma.

**ANNEX 8: Workshop handout aimed at supporting our effort to build capacity on action experiments: Am I involved in an Action Experiment? (by Martin Sandbrook)**

**Am I working differently? (or, are we working differently?)**

An Action Experiment is a way of being, and is likely to involve some or all of these:

- Being as inquisitive and curious as I can be
- Trying to notice my own stance and how it might get in the way
- Trying to start conversations, hearing as many points of view as possible, rather than trying to persuade people
- Trying to notice my (and other people’s) assumptions and check them out
- Trying to make as many connections as I can with and between others
- Accepting that there is no right answer – I am learning by doing.

**Suggestions:**
Start small.

Start where you feel energised, interested, edgey, toward the improving CSO strategies for the Great Transition.
Keep your overall aim simple – not trying to change the world (at least not straight away!). Your aspiration may change as the experiment unfolds.

Start alone or with one or two others.
Prepare the ground – it may take time to persuade people.
Work through cycles of action and reflection.
Enrol others as appropriate, as you go through these cycles and as you gain confidence. Be ready to shift from ‘my’ experiment to ‘our’ experiment.
Work with those who share your purpose, find friends – how to deal with those outside the group is one of the questions that may need to be answered.
Work through conversation and relationship.

Try to be in experimental mode, learning, open to what emerges.
Answer your questions through action – by acting in the world (which is not the same as just thinking about it).
Notice what happens. (Noticing is not judging.)
Keep a running record. It helps you and others notice what is going on (small things might matter in creating / not creating big changes).
Notice what effect you are having on this work and what effect is it having on you.
Forgive yourself and others.

Constantly scan – what is emerging, changing?
What knowledge exists already and how do we use it? (This might be an early question and action)
What is happening? Be ready to change
What might we build on? What opportunities are there?
Are there some symbolic things happening which disguise deeper issues?
What tools might we use? What is the flow, are there feedbacks, traps etc?

Notice what emerges and how you respond to it – inner and outer.
Are you using other ways of knowing – intuition, feeling, action?
Reflect on this and on what you learn from it. What new questions arise?

If it gets blocked, be prepared to stop and try something different.
Don’t worry if it’s messy.

It won’t be easy!
Who do you share it with? Who helps you think about where to go next?