

Journal of Awareness-Based Systems Change



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Writing from a Relational Systems Thinking Standpoint

Melanie Goodchild

Fourth Person

Otto Scharmer and
Eva Pomeroy

Te Ruru: Co-creating an Indigenous Systems Change Framework

Tom Johnson et al.

Unearthing Beauty

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Hedgerows, Hedgehogs and Campus Biodiversity

Glen Cousquer et al.

Drawing New Relationalities with Migrants and Immobile Exiles

Camille Courier and Laura Winn

Harnessing Dialogue as a Social Technology for Systems Change in Development Institutions

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AND MORE!

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Editorial

Awareness-Based Systems Change:

Prototyping the Third Option

Oliver Koenig, Eva Pomeroy, Megan Seneque, and Otto Scharmer

Approaching the task of writing each issue's editorial always brings with it a dual sense of privilege and profound responsibility as we aim to give expression to our evolving understanding of Awareness-Based Systems Change, whilst also doing justice to the collection of contributions, capturing the essence that both informs this broad understanding and makes up the unique character of each issue. At first, and when done alone, this task can often feel overwhelming. But when we ask what it looks like to 'walk the talk' of our own cause, and we move toward an answer by co-developing our own practices and rituals, the task moves into the realm of what is not just possible, but uplifting and inspiring. Creating intentional moments to pause and reflect—both on the events in the external world and environments that surround and make us, as well as on the internal resonances within and between us—has opened a space of liberation, a place of hope amidst the otherwise overwhelming acceleration and collective creative paralysis we have frequently discussed in previous editorials. It is from this place that we write, and the process of conceiving each editorial itself has become emblematic of both the outer form and inner essence of what we firmly believe an awareness-based approach to collective action for social change embodies. This approach offers an alternative pathway, a route that transcends the deadlock of dualistic thinking and acting making possible the creation and enactment of

more effective methods to address our pressing crises. Our own process is a microcosm of what we attempt to prototype with JASC as a whole: a space of exploration beyond the constraints of our existing ontological and epistemic paradigms that supports generative and life-sustaining ways of knowing, being and doing, both ancient and emergent.

The articles that make up this issue traverse many of the domains that shape our societies and our lives: learning, leadership, climate, governance, research and art, among others. Each of these domains, as well as their intersections, face challenges which our old paradigms for understanding and acting on the world are ill-equipped to face. In academic institutions worldwide, entrenched conflicts have led to deviation from the foundational role of these anchor institutions as arenas for public debate, capable of moderating dissent. Democracies throughout the world are caught in a polarizing grip—echoed in rhetoric that swings between moving backward ("Again") and maintaining the status quo ("Still"). When choice is presented as "either-or," as it is throughout much of mainstream discourse, hardly any room is left for the "both-and" approaches necessary to embrace the complexities of our interconnected realities. Characterized by binaries—subject and object, body and mind, thinking and feeling, human and nature, us and them—our existing foundations are neither able to adequately inform action in a world marked by inter- and intra-connected realities any longer, nor do they provide explanatory capacity for the complexity of our current situation and the dialectic struggle between old epistemologies and emergent realities we are caught in. We sense that if we continue to operate from the existing foundations, we will fail.

Jamais Cascio (2020), describing our current global context, introduces the acronym BANI as an update to the VUCA (Volatile, Uncertain, Complex, and Ambiguous). He argues that current reality represents a "phase change" in need of a new paradigm and, with it, new language, and offers instead BANI: *Brittle, Anxious, Nonlinear, and Incomprehensible* (Cascio, 2020, paras 6-7). Cascio does not regard this current state as reason for despair, but rather as a call to invoke alternatives ways of knowing and being:

The BANI framework offers a lens through which to see and structure what's happening in the world. At least at a surface level, the components of the acronym might even hint at opportunities for response: *brittleness* could be met by *resilience* and *slack*; *anxiety* can be eased by *empathy* and *mindfulness*; *nonlinearity* would need *context* and *flexibility*; *incomprehensibility* asks for *transparency* and *intuition*. These may well be more reactions than solutions, but they suggest the possibility that responses can be found. (Cascio, 2020, para 45, *italics in original*)

Approaches reflecting Cascio's vision of possibility do exist, and are increasingly coming to the fore. More than just methods, these approaches and bodies of work are born from an emerging transformation in the way we conceive knowledge (epistemology) and existence (ontology). We think of this

transformation as the *third option*—a novel way of connecting that holds the potential to regenerate societies, ecosystems, and communities.

In asking what constitutes such a third option, we find inspiration in a multitude of seminal writings across a variety of intersecting “lines of flight” (Deleuze & Guattari, 1987). All disruptive and regenerative in their own right, collectively these works point toward the relational inseparability of our ways of knowing and being. We draw inspiration from Martin Buber’s notion of the “third alternative” (Buber, 1966) in which he underscores the primacy of relationships over individual entities, presenting a foundational shift in understanding sociality. This perspective fosters a relational ontology, challenging us to move beyond seeing ourselves as isolated agents and instead as participants in a web of interdependent relationships. Countering critical re-interpretations of Buber’s distinction between the “I-It” and “I-Thou” relationships, Metcalf & Game (2011) see Buber’s relational logic not replicating but rather transcending binary by allowing for a connection that acknowledges and retains difference without reducing it to sameness or otherness. They posit Buber’s main contribution lies in his assertion that genuine relationality involves meeting the *other* in their full, undefinable difference, which is a direct challenge to the deconstructionist perspective that sees difference only as the result of oppositional breakdown. They emphasize that for Buber, the relational meeting is an ontologically primary experience where relation itself is the ground of being, enabling both the existence and interaction of “I-It” and “I-Thou” within the same existential framework. This inclusive approach allows for a more nuanced understanding of inter-human connections, where difference and sameness coexist without the necessity of conflict or the compulsion to resolve tension into neat categorical divisions (Metcalf & Game, 2011, p. 354). The work of anthropologist Deborah Bird Rose reminds us that the call of the *other*, to which we respond, applies to more-than-human connections. Further, the relational space she describes is deeply ethical, a critical dimension as we navigate this third option. As Rose (2011) describes,

That thin, scary zone where life and death brush close together is an opening wherein we are vividly called to ethics...We respond. We turn our faces toward the innumerable selfhoods of the living world, and we do what we can (p. 145).

Her primary questions help define the core inquiry of the third option: “Are self and others flourishing? Are the possibilities for life enhanced?” (Rose, 2011, p.12).

In heeding and highlighting Melanie Goodchild’s guidance in this issue’s commentary on entering into dialogue and relationship with Indigenous research and standpoint theory without appropriating, we recognize Indigenous knowledge systems, in existence for millennia, as another guiding post for the third option. As Cox et al. (2021) note, Indigenous epistemologies unsettle and at times invert “the concepts of objectivity, subjectivity, the Other, and universalism,” (p. 461) offering a profound critique of the Enlightenment’s legacy on modern positivist science and thought. Chilisa (2011) adds that people are “embedded in a web of

relations and interconnectedness that extends to nonliving things," which requires a dynamic understanding that continuously engages with this web of relations (p. 186). Martin (2017) further underscores this by pointing out that Indigenous onto-epistemology is premised on real conditions of existence. Here we see resonance with the main axioms of post-humanist thinking that challenge the alienating tendencies of conventional frameworks grounded in representationalism. Barad (2003), for example, makes an ontological distinction between representations and their subjects, founded on an understanding that the inherent nature of experience precedes any representation of it (p. 802). Indigenous research methods exemplify how *doing* can serve as a form of performative agency and immersive experience (Martin, 2017). Rather than abstractly theorizing about objects or subjects, these scholars describe methodologies that engage directly with the world, embodying knowledge through and in practice, whilst maintaining a constant dialogue with the web of interconnected relations with the human and more-than-human worlds that define and provide the conditions for our existence. Entering into direct relationship with the world, and surfacing knowing through that movement and relationship, are hallmarks of the third option, and one of the commonalities that run across all of the contributions to this issue.

Also common to the contributions is experimentation with the new, feeling our collective way toward possible futures. Somewhat counterintuitively, it may be the current context of crisis and rupture that creates the impulse for such experimentation. Periods of acute disruption can act as an amplifier as they accelerate acknowledgment that old scripts haven't worked and aren't likely to do so in the future. These liminal feelings of vulnerability often lay bare ruptures that then allow for and bring forth creative responses. New social, political, and ontological contours emerge in the context of crisis, which allow us to act into these contexts in ways that embody and embed new relational networks. Rosi Braidotti's (2006, 2013, 2019) philosophy provides a powerful lens to further conceptualize this transformative journey. Braidotti rejects the despair often associated with critiques of humanism, instead advocating for an "affirmative positionality" that seeks "critique with creativity" (Braidotti, 2013, p. 51) in the pursuit of finding alternative ways of living with one another. Braidotti's call for a posthuman turn involves embracing a theory of the human subject that acknowledges the decline of a narrowly defined anthropocentric humanism, celebrating this decline as it heralds the emergence of the self as an extended, distributed, interconnected, and relational entity. This new conceptualization of self is not confined to the boundaries of traditional humanist thought but is instead "embodied and embedded" (Braidotti, 2013, p. 51) within a network of relationships. Braidotti's posthumanist theory thus points to the significant re-emergence of "the structural others" (Braidotti, 2013, p. 37)—those once marginalized by mainstream narratives. This re-emergence fosters novel and hopeful visions of selfhood and community, where individuals, recognizing their interdependencies, can experiment with new models of self that champion community, belonging, and kinship over individualism.

Articles in this Issue

Each article in this issue—akin to fractals—where the essence of the third option is vividly manifest—speaks from a deep place of connection, affirming our belief that collective actions inspired by people, place, and purpose, can lead to more just, effective, and sustainable outcomes. The contributions in this issue do not shy away from the complexities of the current global situation; instead, they confront these realities while simultaneously reaching for what we most deeply aspire to achieve. Through their exploration of new ontologies, epistemologies, methodologies, and ethics, the papers demonstrate how we can move forward. Acting from a knowledge grounded in the field, influenced by diverse human and non-human agencies, they offer glimpses of what it means to live and act within the framework of the third option.

In this issue, Dr. Melanie Goodchild, Anishinaabe scholar and member of our Editorial Board, provides a profound *Commentary from the Field* exploring the complexities of integrating Indigenous wisdom within academic frameworks. She offers considerations for non-Indigenous persons when they, through their practice and writing, come into relationship with Indigenous knowledge systems, underscoring the importance of “right relations,” humility, relational accountability, and the role of cultural and academic self-location in research. Goodchild advocates for a deep, respectful engagement with Indigenous scholarship. When non-Indigenous authors frame their works as *decolonizing* or *Indigenizing*, they owe an “implicit indebtedness” to not only connect their lived experiences to the lineages of others in the field but also to acknowledge and be explicit about what their engagement has taught them. Such open and dialogic engagement, particularly with concepts like time, space, place, and identity, she asserts, holds emancipatory potential. By advocating for the mutual recognition and “deep relationship” of and between diverse epistemologies, Goodchild's work speaks directly to the core tenets of the third option. She emphasizes that true relationality and humility in scholarship can lead to more meaningful and authentic knowledge production.

This issue features another *Invited Article* by Editorial Team members Otto Scharmer and Eva Pomeroy. Strategically placed as an opening piece of this Volume, it reflects our collective recognition of being at an inflection point in the journal's history, and aiming towards further articulating and deepening the foundation for the journal's evolution. In this context, the invited article, *Fourth Person: The Knowing of the Field*, introduces fourth-person knowing as a sui generis epistemic category, distinct from existing epistemologies, first-person (subjective), second-person (intersubjective), and third-person (objective). Scharmer and Pomeroy frame fourth-person knowing as an extension of self-transcending knowledge, exploring the blurred boundaries where the knower and the known intersect, to provide a foundation for new research and inquiry methodologies based on sensing and presencing. Central to their concept is the idea that mind and world are intertwined in a co-shaping relationship. This interconnected nature allows for the development of deep sensing and presencing

capacities among individual change-makers and leaders, and among collectives. These capacities enable tuning into latent developmental possibilities that are not immediately evident through empirical means but can be recognized through new cognitive practices. By articulating and centering fourth-person knowing, Scharmer and Pomeroy provide an epistemic basis for individuals and collectives to recognize, connect with, and manifest their "unique imprint" within the broader pattern and movement of our current moment. This article lays the groundwork for a deeper understanding and application of Awareness-Based Systems Change, aligning with the journal's evolving mission and vision.

This issue features five *Peer-Reviewed Articles*. The first, *Te Ruru: Co-creating an Indigenous Systems Change Framework* by Tanya Allport, Tom Johnson, and Amohia Boulton, connects to the idea of the third option by navigating the space where Indigenous knowledge systems and Western systems thinking intersect. Systems thinking recognizes the interconnectedness of natural and human-made systems, providing a lens for identifying the systemic structures that produce contemporary problems. The authors argue for the compatibility between systems change thinking and Indigenous worldviews, suggesting that new Mātauranga (knowledge) can emerge in this intersection, when the two are in right relationship with one another. As Indigenous researchers who are pan-tribal, the authors operate from *responsive Indigenous standpoints*, positioning their Whakapapa (genealogy), Whenua (land), Tikanga (values), and Mātauranga (knowledge) in relation to others, with a core belief in connection (Whanaungatanga). The article outlines a systems change framework developed within a tribally-owned health research center in Aotearoa New Zealand, designed to enable a whole-of-systems approach to Māori health research. The article introduces "Te Ruru," an Indigenous framework of systems change, designed by a Māori health research center to address systemic inequities in Māori health outcomes. Te Ruru is depicted in three parts: the micro lens prioritizing Indigenous identities and values; the macro lens translating research findings and providing strategic oversight; and the meso lens focusing on new Mātauranga, addressing internal barriers and traumas and emphasizing healing and restoration. Its transformational power lies in its ability to surface both seen and unseen aspects of systems, supporting Māori leadership in systemic change via Indigenous health research. By fostering systems change from an Indigenous paradigm, Te Ruru represents an act of decolonization against systems that hinder Indigenous flourishing. This framework, adaptable and iterative, serves as a living model that evolves with each application, refining research within diverse cultural systems.

The second Peer-Reviewed Article, *When Beauty Leads* by Laura Blakeman, explores the relationship between experiences of beauty and leadership in times of rupture. Blakeman draws from trans-disciplinary literature to position beauty as an aesthetic experience that provides leaders with pathways to greater awareness and capability amidst uncertainty. Through research using art-based methodology she describes how a guided experience of beauty offered to a group of systems leaders revealed that beauty can stimulate novel insights, emotions,

and perspectives beyond their customary experiences. This aesthetic sensitivity fostered connections with others, authentic self-expression, and a willingness to experience discomfort. Through her work, Blakeman identifies four core themes: beauty as a guide, beauty and liminality, beauty and authentic connection, and beauty and discomfort. These themes highlight beauty's role in catalyzing a shift in consciousness, making visible a broader set of possibilities and perspectives. By bridging the logical and analogical mind, working with beauty offers a holistic, soulful approach to leadership development that is rare in contemporary leadership education. Blakeman introduces the concept of a *leadership of devotion*, suggesting that a commitment to beauty can restore our capacity to feel, imagine, and sense deeply in uncertain contexts and enable creative participation aligned with life-enhancing coherence.

The third Peer-Reviewed Article, *Hedgerows for Hedgehogs and Campus Biodiversity - A Prickly Challenge for Universities* by Glen Cousquer, Peter Lurz, Emily Norris, Liz Van der Meer, and John Gurnell, takes the specific case of hedgehog and hedgerow regeneration on university campuses and examines how it can be used as an entry point and vehicle for building much-needed ecological and vertical literacy in higher education. The paper addresses the responsibilities of universities in responding to biodiversity loss, pollution, and climate change. Using the Hedgehog Friendly Campus (HFC) initiative at the University of Edinburgh as a case study, the authors demonstrate how universities, by creating a healthy environment for hedgehogs, can also support broader ecosystem health. The article highlights the metaphorical and literal significance of hedgerows in education, suggesting that addressing ecological fragmentation requires overcoming institutional fragmentation. By mapping and managing hedgerows, universities can create wildlife corridors and enhance ecological health, integrating student-led research and community engagement into conservation efforts. The HFC initiative serves as a focusing tool, fostering a sense of connection to nature among staff and students and promoting collaborative, transdisciplinary work. Cousquer et al. emphasize that engaging with biodiversity crises involves shifting from management to stewardship, fostering a relational literacy that supports ecological and planetary health.

The fourth Peer-Reviewed Article, *Drawing New Relationalities with Migrants and Immobile Exiles* by Camille Courier and Laura Winn, investigates the impact of climate change on migration and the concept of relationality as a means for systemic change. The authors describe the phenomenon of "immobile exiles," individuals who, despite not physically moving, experience a sense of exile due to rapid environmental changes. This collective experience invites exploration of new relationalities for systems change, emphasizing the interconnectedness of all life. The article argues that climate change results from a disrupted relationship with nature, rooted in the Cartesian mindset that separates humans from the natural world. Courier and Winn use the term *relationality* to highlight the processual nature of being in relationship and suggest that fostering new relationalities can enhance life's capacity to regenerate. Their hypothesis is tested through arts-based research, including

Courier's work with migrant children and adults in France and Canada, and Winn's facilitation of learning about systems change and regenerative development. The article illustrates how visual practices, particularly drawing, can facilitate such new relationalities. Drawing is presented as a transformative educational practice that helps individuals and groups develop awareness of their relationships with humans, other living beings, and the environment.

The final Peer-Reviewed Article, *Harnessing Dialogue as a Social Technology for Systems Change in Development Institutions* by Sophia Robele, investigates the role of dialogue in fostering relational infrastructure and capabilities essential for systems transformation. The paper draws on in-depth case studies of several interlinked initiatives of the United Nations Development Programme (UNDP). The agency has increasingly explored what counts as development impact and the critical forms of innovation and learning necessary for progress. Framed by her positionality as both participant and co-designer in several initiatives, Robele argues for the need to mainstream more dialogic and process-based approaches in multilateral and governmental work. This paper illustrates how dialogue processes can serve as bridges between personal transformation and the transformation of policies and structures, aiming for social, economic, and ecological regeneration. Robele highlights that the deepest leverage points for change lie in the mindsets and paradigms that shape systems. She proposes four paradigm shifts: from linear delivery to relationship orientation, from immediate action to understanding underlying assumptions, from reliance on neutral data to recognizing power dynamics in knowledge, and from technical solutions to co-creating wisdom and capabilities. Despite the challenges of steering large bureaucratic institutions towards more dialogical processes, Robele emphasizes the importance of expanding spaces within these institutions to collectively address barriers related to organizational culture and accountability frameworks. By focusing on the 'how' of development, beyond the 'what,' this approach encourages the co-design and practice of tools that integrate the heart, mind, and hand in development work.

Adjacent to the Peer-Reviewed articles this issue also features a *Book Review* by Elizabeth Walsh titled *Beyond the Limits of Modernity toward Enlivening Futures of Blessed Unrest and Complex Joy: A Review of Routledge Handbook for Creative Futures, Edited by Gabrielle Donnelly and Alfonso Montuori*. In her review, Walsh emphasizes the Handbook's focus on integrating diverse perspectives, grounding theories in personal stories, case studies, and pragmatic practices, offering principles and processes for co-creative future-shaping alongside an assembly of over 50 diverse voices across 37 chapters. Walsh appreciates the Handbook's ability to inspire co-emergence and synergy while also addressing the tensions between contributors. Walsh concludes that the Handbook equips readers with tools to navigate the polycrises of our times with grace, courage, and compassion, making it a vital resource for those committed to co-creating enlivening and regenerative futures.

Following the inaugural and prototype article of *Innovations in Praxis* (Casado da Rocha, 2023), this issue features a foundational text by Editorial curators Fiona McKenzie and Megan Seneque, titled *Art and Science of 'Escape': World Building and Other Leaps towards Transformation*. McKenzie and Seneque write about the relational, messy, and evolving dimensions of praxis, aiming to give others permission to be honest, reflective, and unique. They share their understanding of praxis and what it means to work intentionally with concepts-in-practice through illustration. Their focus is on weaving the threads of methodological pluralism for transformation, and they emphasize the need for systemic intervention and ongoing boundary critique to build resistance to totalizing ideologies. Drawing on their work with the David Suzuki Foundation in Canada, McKenzie and Seneque present six elements of *escape* for transformation: strengthening relationships, structuring for emergence, integration of content and process, deconstructing realities and dismantling constraints, recognition and reconstruction of worldviews, and enlivening possibilities. Their methodology emphasizes responsiveness to context rather than strict adherence to a single method. They describe their role as creating spaces for mutual connections and deep listening, actively scanning for signals of readiness, and challenging worldviews to find new patterns of meaning. McKenzie and Seneque reflect on the importance of “creating hope for the systems aware,” aiming to liberate individuals from limiting worldviews and fostering self-empowered *escapees* capable of reimagining and transforming our economic systems for the wellbeing of people and the planet.

Continuing our tradition, this first issue of our fourth volume also closes with an *In-Dialogue* article. This time, the theme of embodying knowledge through practice is taken up in a piece entitled *Transgressive Knowing: Lying Down with the Trouble*. This dialogue explores the contours of transformative and transgressive research and its role in shaping new worlds, drawing from the participants' diverse practices and perspectives. The dialogue, facilitated by Oliver Koenig and Megan Seneque, brings together Bayo Akomolafe, Iacon Fazez, Injairu Kulundu-Bolus, Dylan McGarry, Fiona McKenzie, and Michelle Proyer. Together, they reflect on the meaning and practice of transformative research, which seeks to respond to the intersecting crises of our time with ethical, critical, and creative approaches. Throughout this lively dialogue participants share personal stories and insights that highlight the idea that transformative research is relational and co-creative, fostering deep connections and mutual learning. In many ways, this dialogue itself is a lived experience of the kind of world-making practices that are at the heart of transformative research, illustrating how new paradigms can emerge from collaborative inquiry and shared understanding.

As an editorial team, we think of the future as a potential always in the process of being re-created and realized in the present moment (Sharpe et. al., 2016) and we see our role as part of a broader movement and network of connections that we aim to help nurture. In doing so, we take a hopeful stance: the future is not a distant dream but a present reality, unfolding in diverse

communities and initiatives around the globe. In the context of shaping the third option, this hope is enacted in the rebuilding of a sense of community, of belonging, and of purpose as humanity. It requires purpose, agency, and organization to activate its underlying values; it is not passive. In that sense hope is an ethical stance, stimulated by addressing inequities and injustice, creating alternative futures in the context of our current realities.

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Commentary from the Field

Writing from a *Relational Systems Thinking* Standpoint:

A Commentary

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Humility comes into play here as an important attribute of a storyteller or scholar. I am no more important or knowledgeable than anyone else. All I am doing is sharing some of my relationships, revealing some of the connections that make up this theory. I must recognize that in the larger scale of things, the totality of all the relationships I hold and am beginning to understand are only a miniscule part of the grand scheme of relationships that are out there. As a storyteller I can demonstrate this humility by acknowledging my shortcomings and admitting my own ignorance. I am not a perfect being or perfect researcher. For me to think that I am would be dangerous to us all. For me to force my ideas on anyone else is personally and culturally repulsive (Wilson, 2008, p. 134).

Locating Myself

Waabishki Ogichidaakwenz-anang indizhinikaaz. Waaba-anang Ikwe indigo Anishinaabemong idash Melanie Goodchild zhaaganaashiimong. Those are my spirit names, what am I called in Ojibway and I am called Melanie Goodchild in English. I am Anishinaabe (Ojibway). *Moonz nindoodem.* I am moose clan. *Biigtigong Nishnaabeg izhinikaade ishkonigan wenjiyan gaye Ketegaunseebee nindoonji. Bawating indayendaa noongom.* I am from Ojibways of the Pic River and Garden River First Nations and today I am in Bawating, the place of the rapids, Anishinaabe territory and the traditional lands of the Three Fires Confederacy (Potawatomi, Odawa and Ojibway). I earned a PhD in Social and Ecological Sustainability last year and my academic work focused on decolonizing systems thinking and complexity science. I am a member of the editorial board of the JASC. Locating myself in writing this brief commentary is foundational in Indigenist research paradigms, I locate myself culturally and academically as it centres *relationality* and allows readers to connect to me via my lineage, kinship, and relationship to land (Bishop, 2021). This commentary is now part of my *miinigowiziiwin* (sacred knowledge bundle) as it is a process of creating knowledge, so I am grateful for this gift.

Dibaajimowin, gakiikwe'inan & gichi gakinoo'imatawin

This is a dibaajimowin (story). I am often asked to review, write or contribute to academic endeavours across a variety of modalities. In honour of what Opaskwayak Cree scholar Shawn Wilson (2008) calls an Indigenous discourse pattern, I have responsibilities as both a writer of this general commentary, my *dibaajimowin* (story) and also as a listener to the *dibaajimowin* of the reader. My relational accountability is that pattern, and the underpinning of it is *humility*, one of our Anishinaabe Seven Sacred teachings, also referred to as the Seven Grandfather Teachings. Here are some thoughts for your consideration if you are coming into relationship with Indigenous wisdom traditions and you are not an Indigenous person.

The purpose of an academic journal and its contents are to offer *gakiikwe'inan* (teachings). These teachings come from diverse datasets. Offering a text-based paper in English, gifting those *gakiikwe'inan* to the audience who reads a journal is *gichi gakinoo'imatawin* (the act of great or deep teaching). It is great or deep because so much thought, research, and heart go into the preparation of such offerings. As such, it is important to consider how best to share a story. As I read various materials for publication a couple of things strike me at a more meta-level. First, as a contributor to the editorial board of the JASC I am being asked to fulfill the role of a gatekeeper of what perhaps counts as valid knowledge in the academic world, a position that causes me great distress. Second, I am also being asked to listen to the *gakiikwe'inan* with an open heart and mind. It is with those two acknowledgements that I begin my story.

Some stories are not appropriate for publication not because of the content but because of the form. It is often a significant challenge to respectfully represent Indigenous wisdom traditions in text form and in English. Some stories may not want to come to life as a journal article and I would recommend considering seeking to share those stories *in a revised form*. The goal of storytelling in academic journals is to *connect the dots for readers*, as my brother Julian Norris once told me, and that makes a lot of sense. The published papers offer *gakiikwe'inan* to help the readers—to help them understand how the research findings, and the lived experiences of the writers, connect to the literature and lineages of others in the field. And we must be gentle and generous with those connections, pointing out the nexus of where our worldview comes into relationship with other worldviews. Do they clash, does one worldview dominate the other, or are they in right relations, two vessels sharing the river of life? Sometimes, I find it difficult to make those connections in the conceptual framework of submitted papers, frameworks that use non-Indigenous theories and concepts to represent Indigenous thought patterns. It can work but it's difficult sometimes to find the right balance.

After reading academic texts submitted for publication in this journal and others where I offer peer reviews, I am left craving a deeper engagement with the lineages of the Indigenous scholars, knowledge holders, language speakers and collective song carriers who paved the way for academic journals like the JASC to publish from a standpoint of culture-based, gender-based and place-based subjectivities. And subjectivity is the hallmark of Indigenous wisdom traditions and lineages. I want to know more about the writers' personal relationship with the teachings, which may be citations or personal conversations with Indigenous thinkers. The *gakiikwe'inan* is *that*, the process, not the content—let's explore whatever you are writing about from your unique positionality, or as we would say in *Anishinaabemowin* (our original ways of speaking), from your *miinigowiziiwin* (your sacred knowledge bundle). Once I know who walks, flies, crawls or swims with you in the place where you come from or currently live, together we can connect the dots to the *gakiikwe'inan* of other decolonizing scholars you cite or sing into the story with us, out of respect for their contributions to your learning and to scholarship overall.

I recently read the JASC article on Relational Design by Udoewa and Gress (2023) on *dialogue as methodology*. Those authors connect the dots. As Indigenous peoples our oral cultures are sources of animation for sharing a *dibaaJimowin* and *gakiikwe'inan*. Writing is also a *method of inquiry* as settler scholar Laurel Richardson so aptly shared (see Richardson, 2000). I would invite contributing authors to this journal to consider reframing their work if that is what emerges through the writing process, to explore writing as a method of inquiry, perhaps as a decolonizing praxis. I did so in my first article (see Goodchild, 2021) co-authored with four Mohawk Elders and two systems thinkers. Initially I was writing two separate articles, then brought those voices into dialogue from an Indigenous, Mohawk, two-stream consciousness, represented in a two-row visual code. That is what emerged when I was in

humble relationship with the humans and non-humans who guided me to write that paper. I am deeply in favour of alternative forms of writing and scholarship. The format and literary presentation of papers, such as a dialogue between authors, is organic and emergent. What may be at issue however in terms of ethics, is a lack of engagement with the lineage of scholarship that enables this type of writing to be published in the first place. We stand on the shoulders of giants. For instance, Cree/Saulteaux author Kovach (2010) offers seven distinct characteristics of a conversational method when used in an Indigenous framework (tribal epistemology, relational, purposeful, protocols determined by epistemology and/or place, informality and flexibility, collaborative and dialogic, and reflexive (p. 43). These characteristics are a *relational ontology* that could situate co-authored papers in a respectful and humble way uplifting the multi-voiced description offered in the *dibaaJimowin*.

Perhaps repositioning an article by co-authors, and your co-author may be a river or tree that teaches you, as *an ethnographic study of designing* a generative social field between you and your co-author/s, through an Indigenous-inspired conversational methodology, would introduce a deeper exploration of the “roots” of your understanding (Udoewa & Gress, 2023, p. 110). An unconventional form of a dialogue is not an issue for publishing in this journal, but if dialogue is a decolonizing practice for you, a perceived lack of engagement or understanding of relational ontology is an issue. When I read papers that do not engage with Indigenous scholarship yet attempt to sing that scholarship into the room as mostly nostalgia, it feels disrespectful. To be in deep relationship is not just to cite these authors but also to discuss the gifts they offered you on your wisdom journey—the spiritual, physical, emotional and intellectual gifts. That is a story that seeks to be told.

Calling in Indigenous and other authors without articulating a standpoint on those authors’ respective theories/works/teachings doesn’t really indicate to me that *we are part* of a generative social field together. What intellectual/spiritual framing do Indigenous scholars and teachers/guides offer to you? For non-Indigenous peoples framing a paper as ‘decolonizing’ or ‘Indigenizing’, there is an implicit indebtedness to Indigenous, feminist, and systems scholars. I want to understand more about who and why another published author speaks to your heart and mind, so I would suggest that you acknowledge *precisely what each of them taught you*.

If a paper adheres to Indigenous paradigmatic discourse (decolonization) it contextualizes the intellectual analysis in terms of the worldviews and the belief systems used within the research context explicitly (through citations, songs, poems, art) to signify that the methods (for instance dialogue) are congruent with the chosen philosophical orientation to show internal methodological consistency. This would be accomplished if an author shares more with us about their *miinigowiziwin*. This is incongruent with Euro-scientific conventions that uphold objectivity as validity, but from an Anishinaabe validity standpoint, we must share who we are, where we come from, and how we came to be in

relationship with the teachings we write about. Anishinaabe scholars do this when we introduce ourselves, as I did at the start of my *dibaaJimowin* here. In the Turtle Island (North American) context, are you an Indigenous writer, with a direct lineage to the first peoples of this land or are you a baby Turtle Islander, as my friend and colleague Tiokasin Ghosthorse, Lakota, calls settlers. Tiokasin and I have had some powerful yarns, including one we recorded on his radio show *First Voices Radio*.¹ State clearly your positioning in relation to place, to the lands and waters where you are from and where you currently reside.

A *dibaaJimowin* may be better suited to an *autoethnographic* telling and a focus on *storytelling* as a conceptual framework or perhaps a dialogue is best, or a poem or a carving; our humility helps us to listen to what the *manidoog* (spirits) are gently (or rather insistently) guiding us to do. My dear friend and brother Tyson Yunkaporta, an Aboriginal scholar from Australia, in both of his books, *Sand Talk* (2019) and *Right Story, Wrong Story* (2023) carves weapons and other tools encoding into them the stories he hears during yarns. This is congruent with his cultural lifeways. In my own doctoral dissertation, the final chapter is a series of illustrations by young Anishinaabe artist Ocean Kiana based on yarns I had with Anishinaabe Elders and language speakers, my relatives Eleanor Skead and Bert Landon. In fact, the final chapter was the result of working with a design firm in Chicago, Greater Good Studio, that publishes knowledge products for social good and was supported financially by a global philanthropy. The point is, it was a collective effort! I am not a guru or expert, rather, I bring together collective wisdom traditions and knowledge bundles, to be in relationship with each other then share that, hoping I succeed in connecting the dots. Last year I published an essay, on the website for the Wolf Willow Institute for Systems Learning,² about some time I spent with Tyson. I shared teachings of our gift exchange. Here is an excerpt:

Tyson offers me gifts he made. The first is a woman's fighting stick (a miniature one). It is a multi-tool, a spear, a club, to throw, dig, fight, dream. It is made of Gidgirr wood (very hard acacia) from copper-rich ground in West New South Wales. Engraved on it is a turtle symbol from Oldman Juma Fejo from the Larrakia People (which is seen in the *Sand Talk* book). The second gift is whalebone (blue whale) burnishing tool, that was used to polish all the carvings made for the *Sand Talk* book. So, all that story and lore is in there. It is roughly carved in eel-shape, a migratory animal that moves between fresh and salt, land, and water. Transformations. There is white owl story in that bone he says,

¹ See <https://radiokingston.org/en/broadcast/first-voices-radio/episodes/with-guest-melanie-goodchild>

² See https://static1.squarespace.com/static/5edef2eb3032af28b09b8cc3/t/636c6d31450b0f0bc4b9aaeb/1668050232743/DuckShitTea_22-11-09_vf.pdf

brought up from drowned lands by a beaching whale. For each chapter in *Sand Talk* Tyson carved the logic sequences and ideas arising from his yarns into traditional objects before he translated them to into print and his table of contents was visual, on the back of a turtle. This is his method called *umpan*, his people's word for cutting, carving, and making.

The two spirit names I carry in *Anishinaabemowin* are associated with whale and star teachings and my medicine bundle carries turtle medicine. These gifts from Tyson are relationally and spiritually significant. He and I often drink bowls of tea and yarn about whale, owl, turtle and eel medicine. Tyson founded the Indigenous Knowledge Systems Lab at Deakin University in Australia and I founded the sibling entity, the Indigenous Knowledge Systems Lab at Makwa Waakaa'igan, Algoma University in Bawating (place of the rapids) in Sault Ste. Marie, Ontario on Turtle Island.

Not all of us are illustrators, designers, or carvers, me included. So, I write. Udoewa and Gress (2023) introduce the *meta-methodology* of Radical Participatory Design and Relational Design (RD), an “ancient” idea that can be practiced through *dialogue* (p. 104–105). They offer us insightful relevant context about the Indigenous lineages of this type of inquiry, yarning and talking circles. Dialogue and writing up dialogue can serve as a methodological instrument because of the decolonizing turn in discourse with antecedents in postmodernity and poststructuralism. Writing is also a way of knowing. Richardson's work (2000) is a well-respected introduction to writing as a method of inquiry, enabling us to investigate how we construct the world, and does not take the writing of texts for granted. As an Anishinaabe scholar it pains me to have to write in English and share knowledge via textual artefacts but framing “writing as inquiry” and “research as ceremony” (Wilson, 2008) helps ease my distress. Indigenous authors have explored the decolonization of scholarship through Indigenous autoethnography (Bishop, 2021; Whitinui, 2014) as the art of storytelling, resonant with our oral cultures and grounded in a resistance-based discourse. Indigenous autoethnography offers guidelines and writers who submit ‘decolonizing’ articles for consideration to journals may benefit from exploring more deeply concepts of time, space, place, and identity. How do authors understand these core principles of an Indigenous paradigm and relate them to their teachings? Those sorts of *gakiikwe'inan* would be emancipatory.

Niigani Miinigowiziiwin (we give these gifts to the future)

My own writing is most often an ethnographic exploration of being in relationship with others (humans and non-humans), a Native Method of Inquiry as Paul Whitinui (2013), a Māori scholar from Aotearoa New Zealand describes it. Crediting Indigenous scholarship is an act of decolonization, and it is an expression of *mana* (integrity) (Whitinui, 2013, p. 474). The unit of analysis in my various co-authored stories is the *interior journey* of me in relationship with my co-authors along with a report on their insights of emergent relationalities.

Perhaps autoethnography and other creative analytic practices (for instance arts-based methodologies) would be much richer for some co-authors as *gichi gakinoo'imatawin*. It would be *niigani miinigowiziiwin* (we give these gifts to the future), which is how Eleanor and Bert described/defined transformative systems change. It is generational and comes from a place of love for those yet to be born. And this became the title of my dissertation, encoded in the evolving illustrations by Ocean Kiana. The final illustration and text were not published in my dissertation however and only published on my website, out of respect for its sentient nature. I didn't want it captured in time, with no context. Which brings up another interesting option for us as scholars, to not publish some stories or publish them in different modalities. Academic journals have matured but still have a long way to go to be in rhythm with oral and artistic cultures, where our datasets may be dreams, visions, and songs.

Understanding an author's social positionality is necessary because "race and gender are *axes* [original emphasis] through which symbolic and actual worlds have been constructed" (Richardson, 2000, p. 938). *Writing as inquiry* or autoethnography opens up relationality and gives more attention to the metaphoric and narrative aspects of our experience, helping readers navigate the meaning of our experiences. Udoewa and Gress (2023) do this quite well, offering specific examples from their lived experience as an Indigenous scholar and a white scholar in relation to systems change theory and praxis.

I am grateful that I learned from Udoewa and Gress, from Ocean, Eleanor and Bert, and from Tyson, what they experienced and how I may encode that into my own scholarship and practice. Relating theory to practice is critical. This commentary is offered with humility, in consideration of the complexities (benefits and dangers) of baby Turtle Islanders being in relation with Indigenous thinking, to avoid appropriation by being in deep rather than shallow or nostalgic relationship with the teachings. Decolonized writing is challenging and the emerging aesthetics (representation of our lived experiences) of Indigenous scholars like me are born while we simultaneously hold accountable academic texts for adherence to cultural protocols of relationality and respect for sources of knowledge, and for *mana*. It has taken me days, weeks in fact, to prepare this particular *dibaajimowin* with due diligence both academically and somatically, sitting with ideas, envisioning in my mind a reader metabolizing these words, as we both sip bowls of tea. I was not offered *asemaa* (tobacco) for this *dibaajimowin* but that is the spirit in which I offer my *gakiikwe'inan*, at the risk of being personally and culturally repulsive. *Miigwech* for the opportunity for *gichi gakinoo'imatawin*.

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Invited Article

Fourth Person:

The Knowing of the Field

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Abstract

In the context of polycrisis and systemic collapse, the primary challenge we face is a widely shared sense of collective depression—a lack of agency in regard to the bigger picture. What does it take to serve evolutionary transformation in the face of this collapse? In our view, it takes a form of knowing which extends beyond the current constructs of first-, second- and third-person knowing around which much of our current learning, knowledge, and leadership systems are organized. In this paper, we suggest fourth-person knowing as a distinct epistemology at the intersection of the other three, and we draw on our action research to illuminate five phenomena that point to and distinguish fourth-person knowing: (1) knowing that comes through me but is not of me; (2) knowing that shows up in my individual experience as a decentering of perception; (3) a heightened sense of potential, of possibilities that previously were experienced as unattainable now appear to be in reach; (4) sensing your own agency in helping the ‘universe’ (the larger field) to evolve; and (5) significant long term impact in terms of practical results. It is our hope that by

articulating fourth person knowing we can provide an epistemic basis upon which research and inquiry methodologies can be built, complementing first-, second- and third-person forms of inquiry, methodologies based on deep sensing and presencing that support individuals and collectives to recognize, connect with and manifest what is theirs to do in the wider context of this moment and the incipient patterns of emergence and movement making.

Keywords

fourth-person knowing, Theory U, social field, trans-subjectivity, self-transcending knowledge, presencing, awareness-based systems change

Introduction

The number one problem facing humanity today is not climate change or inequality or war. It is not the proliferation of artificial intelligence (AI). Rather, it is our sense that we are powerless to change any of it. The old ways of knowing and acting in our world are no longer sufficient. Our systems are collapsing. If we are going to serve societal transformation in the face of this collapse, as we believe is fully possible, we need to draw on a new form of knowing—knowing for transformative action.

Our existing categories of knowing—first-person (subjective), second-person (intersubjective), and third-person (outside-objective)—upon which our systems of learning, knowledge creation, and leadership are based, are important but not sufficient to activate the deep shift and energy that are called for now. We need a quality of knowing that allows us to connect with and appreciate more deeply the dignity and interiority of the worlds that surround us and that we co-shape and co-enact moment to moment. It is the collective interior of the worlds co-arising in us in general, and the more subtle and emerging qualities of social systems in particular, that have remained in an epistemological blind spot if seen from the viewpoint of positivist approaches to science. And yet, deep in our own experience, many citizens, change makers, and leaders know that to meaningfully address the profound polycrisis of our time we need to tap into a deeper source of knowing. That source of knowing already exists and in many ways underlies the actions of thousands, if not millions, of innovators and networked communities around the world. This deep collective awareness is a gateway to emerging future possibilities that depend on our presence and agency to manifest. We believe it is this very personal and yet collective-interior way of sensing and knowing that is at the core of our planetary moment and movement making and that we refer to and introduce here as *fourth-person knowing*.

In this paper, we unpack the fourth-person perspective, first making the case that it is a knowledge type *sui generis*, epistemologically distinct from the other three forms, and then drawing on our action research to illuminate its source, form, and nature. Fourth-person knowing can be thought of as an expression and extension of *self-transcending knowledge*, or “tacit knowledge prior to its

embodiment in day-to-day practices, (Scharmer, 2001, p. 139), which emphasizes “the ability to sense and presence the emerging opportunities, to see the coming-into-being of the new” (Scharmer, 2001, p. 137). The extension here is to bring self-transcending knowing into the frame of person-perspective epistemologies (first-, second- and third-person knowing), exploring the epistemic space where the boundary between these forms of knowing blurs, and where there is *both* overlap and differentiation between knower and known. One of our intentions in bringing self-transcending knowing into the fourth-person frame is to provide an epistemological basis upon which research and inquiry methodologies can be built in parallel to first-, second- and third-person forms of inquiry—methodologies based on *sensing* and *presencing*.

The concept of presencing, and the Theory U approach that underpins it (Scharmer, 2016, 2018; Scharmer & Kaufer, 2013, *forthcoming*), is based on the assumption that human beings have the capacity for deep sensing. It is a capacity for sensing not only what is, through perspective taking and tuning in to different perspectives, but also for sensing what isn't *yet*, what is *about to emerge*. Sensing is really about embodied knowing. It is aesthetic, drawing on the Greek *aisthesis*: the knowing of all our senses. Presencing combines sensing with actualizing the emerging future.

Presencing is essentially an antidote to positivism, which separates mind and world. The core assumption underlying fourth-person knowing is that mind and world are not separate, but rather are intertwined in a co-shaping relationship. As such, presencing sits firmly in the blind spot of generative artificial intelligence (AI). AI excels at processing, ordering, and extrapolating from masses of existing data, and this is the place from which it projects the future. But AI cannot source from this deeper level of sensing, which we maintain is where the new comes into being. Presencing is therefore the source of knowing needed to address the deeper dimensions of the challenges we face. The more the capacity for deep sensing and presencing is developed and cultivated, the more easily skilled change makers, leaders, and other developmental professionals will be able to tune in to latent developmental possibilities that are neither empirically evident (yet) nor merely a subjective fiction in the eye of the beholder. They can be evidenced through a new category of cognitive practices that, in this article, we call fourth-person knowing.

A Blind Spot in Western Cognition

The fourth-person perspective addresses a type of knowing that is largely missing in today's institutions of science, education, and societal decision making. It is missing because it addresses a blind spot in Western cognitive epistemologies. Neurophenomenologist Francisco Varela described experience as being “at the very center of many traditions, but it has been obscured in the Western tradition, particularly in science...it is as if there's a big blind spot” (as cited in Scharmer, 2000, p. 1).

Varela developed a synthesis of the three approaches that he saw as addressing this blind spot—psychological introspection, phenomenology, and meditation—to draw out and formalize what was methodologically consistent across them. His intention was to build and support a science “which includes first-person, subjective experience as an explicit and active component” (Varela & Shear, 1999, p. 2). Varela and his colleagues identified a framework and method for inquiring into first-person experience, what they called the core process of *becoming aware*, made up of the three gestures of *suspension*, *redirection*, and *letting go* (Depraz et al., 2003). They maintained that these gestures can be, and need to be, cultivated through practice in order to build the capacity to access first-person experience such that it moves beyond impressionistic descriptions to “phenomenal descriptions that are rich and subtly interconnected enough in comparison to third-person accounts” (Varela & Shear, 1999, p. 2).

The Theory U framework is grounded in the three gestures of becoming aware outlined by Varela and colleagues, but it extends their application from individual cognition to social systems. The resulting Matrix of Social Evolution (*Figure 1*) is based on two axes: the shifts of awareness and consciousness that Varela described (suspension, redirection, letting go) on the vertical axis, and the different levels of social systems (micro, meso, macro, mundo) on the horizontal axis.

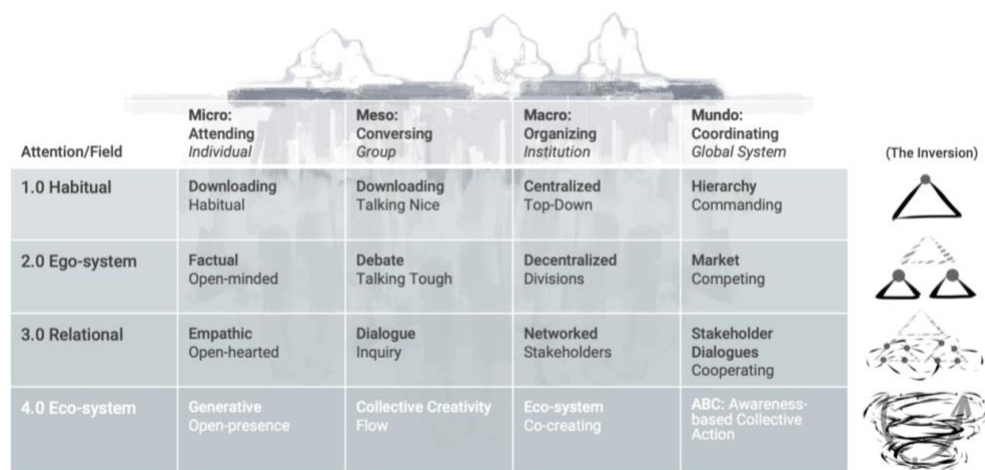


Figure 1. Matrix of Social Evolution (Scharmer, 2018)

As people or social entities go down the left side of the U (i.e., down the vertical axis of *Figure 1*) in their process of cognition, the boundaries between first-, second-, and third-person knowing as discrete experiences begin to fade. The source of cognition shifts to a realm of interaction that blends subjective, objective, and intersubjective knowing, which we refer to as self-transcending, or *trans-subjective*, knowing. Trans-subjective knowing is the knowing of the collective interior. While it shows up in our subjective experience, it is not purely subjective knowing; nor is it purely objective or intersubjective. Rather, trans-subjective knowing incorporates and blurs the boundaries between all these

perspectives to connect with a distinct form of knowing that is experienced as coming *through* us but is not *of* us.

Essential to the exploration of the collective interior is the concept of the *social field* (Pomeroy & Herrmann, 2023; Scharmer 2015, 2016). The social field can be thought of as the interiority of a social system. It is the web of relationships and interactions that give a social space or system its unique quality. The social field has a manifest dimension that includes visible results of the system and relational patterns, and it also has a source dimension from which the manifest qualities of the relational space arise (see Figure 1). Elsewhere we have defined social fields as “the entirety of the social system with an emphasis on *the source conditions* that give rise to patterns of thinking, conversing and organizing, which in turn produce practical results” (Scharmer et al., 2021, p. 634). We emphasize the source dimension as it has been largely overlooked in the consideration of social systems; in other words, it is the blind spot of Western cognition. As we move through the layers of interiority of the social system, through paradigms of thought, through the felt sense or quality of the space, we get to the source dimension where the layers above originate. Whereas the upper dimensions have a past/present quality—for example, carrying collective memory or having an in-the-moment felt quality or atmosphere—the source dimension has a future orientation, connecting with or even *pulling toward* that which is coming into being. This gives the source dimension of the social field a quality of being situated in a particular setting yet also connected to a more universal and cosmological set of forces. It is the knowing that arises at the source level of the collective interior that we consider to be fourth-person knowing.

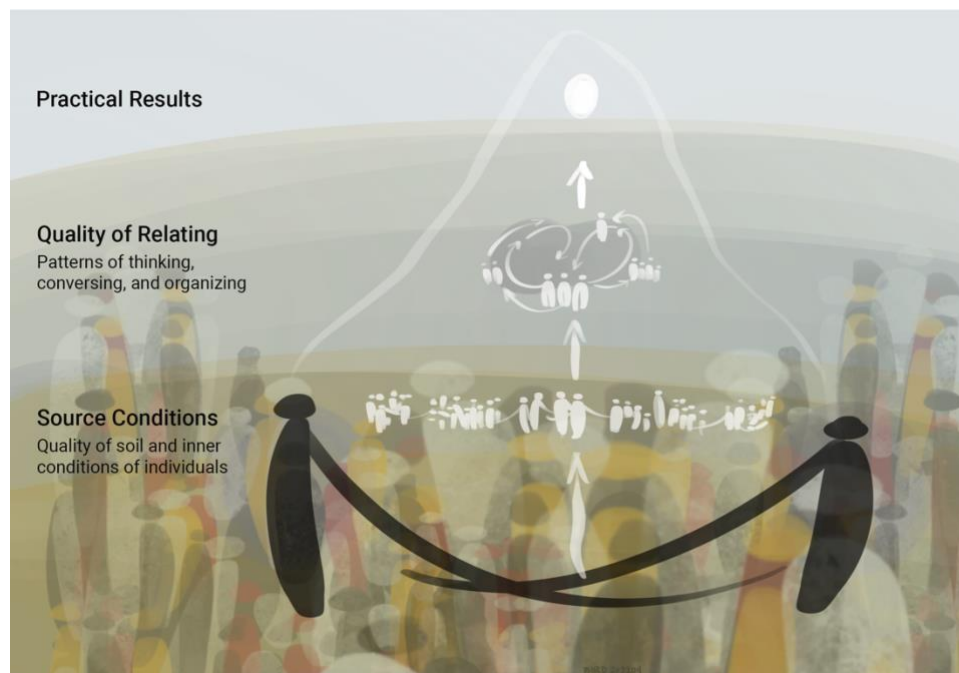


Figure 2. Social Field (Image by Kelvy Bird).

Just as we can refine our capacity to discern, observe, and describe first-person experience in the way Varela describes, so can we build our capacity to access fourth-person knowing, the knowing of the field, through similar processes applied to the collective. Thus, the work of Varela and colleagues provides a foundation and point of departure. The key differentiator between our work and this foundation is that while Varela's core unit of analysis was individual inner experience, our primary focus is the collective inner experience.

1st-, 2nd-, and 3rd-Person Perspectives in Action Research

As practitioners of awareness-based systems change, our focus and intention for the work is to support transformative action in organizations and other systems by providing a framework and methodology for sourcing change from a different kind of consciousness. We therefore locate ourselves within the tradition of action research with its dual focus on democratic knowledge creation and participative processes for systems change. As Bradbury (2015) describes, “action research is emergent and developmental. It concerns practical issues and human flourishing. Its modality is primarily participative and democratic, working with participants and toward knowledge in action” (pp. 7–8). Action research, perhaps more than any other field, has consciously worked to integrate multiple epistemic lenses, using first-, second-, and third-person inquiry as a frame for the work (see Gearty & Coghlan, 2018; Hynes, 2013; Reason & Bradbury, 2008; Reason & Torbert, 2001). Within the action research tradition, each perspective is a complementary strategy or approach in the change process.

First-person perspective can be understood as the subjective experience of the individual. In action research the emphasis in first-person work is on the qualities action researchers bring to an intervention, including sensitivity, discernment, and “an attitude of inquiry” (Marshall, 2004, 2015). First-person inquiry skills include the ability to see one's own habits of thought, to test assumptions, to be open to new data, to bring curiosity to the inquiry process, and to be aware of the cognitive and value processes that lead to decisions (Brydon-Miller & Coghlan, 2019; Gearty & Coghlan, 2018; Marshall 2004, 2015; Reason & Torbert, 2001). As the researcher-intervener is a core *instrument* of the work, attention to the quality and capacity of that instrument is paramount. First-person subjective knowing is intentionally developed for this purpose.

Second-person perspective falls into the realm of intersubjective experience. Action research, with its focus on systems change, defines this specifically as face-to-face engagement in the change process. Coghlan (2019) describes second-person inquiry as the cyclical processes of planning, action, and evaluation in groups and organizations that make up the core activities of a change intervention, usually with the intention of surfacing assumptions and finding common ground. In action research, second-person inquiry is held as primary. Hynes (2013) observes, “in action research literature, second person inquiry attracts the most attention and appears to have the most immediate impact in terms of changes in practice” (p. 55). Gearty & Coghlan (2018) point out that, “as

action research is integrally collaborative and democratic the quality of second person inquiry and action is paramount” (p. 467). We will return to second-person knowing below.

Third-person perspective is what we have come to refer to as objective: the perspective of an observer who sits outside an experience. Action research, with its emphasis on inquiry, describes the third-person view as an arena of engagement that extends beyond those involved directly in a given change process. In action research, third-person inquiry “is reached through dissemination by reporting, publishing, and extrapolating from the concrete to the general” (Gearty & Coghlan, 2018, p. 467). The similarity between the action research frame and the more commonly held “objective observation” frame for the third person is that both describe a perspective outside direct experience.

For scholars and practitioners actively engaged in supporting and facilitating transformative change, action research is primary. That said, the concept of fourth-person knowing derives not only from our action research stance and experience, but also from a broader field of consideration, particularly around the second-person perspective, including cognitive neuroscience, philosophy, and psychology. Within this broader landscape we discover discrepancies and divergence in the conceptualization of the second-person perspective that, for us, highlight the need to articulate a new epistemic perspective.

Second-Person Perspective: Disparity and Divergence

Over the past decade, an interest in the second-person perspective has surfaced within the field of neuroscience and social cognition. In 2013, Schilbach et al. proposed the concept of a second-person approach to social neuroscience. The proposition was founded on the emerging evidence that *engaging* in social interaction is fundamentally different from *observing* social behavior. Redcay and Schilbach (2019), in reviewing findings related to the behavioral and neural mechanisms of real-time social interactions, conclude that these studies “provide strong support for the claim that neural responses differ during interaction and observation” (p. 499). Gallese (2014) further reflects on the neurology and biology of interaction. Well known for his work on motor neurons, he makes the case that while we can view others from a third-person perspective, we also *experience* others through the non-conscious, pre-reflective bodily resonance with the sensory information generated in an interaction (p. 2), describing an experience that is neither entirely subjective nor entirely objective and is, therefore, epistemologically distinct. Moore and Barresi (2017) argue that second-person knowing is distinct from both third-person observation and first-person subjectivity because it incorporates both of those perspectives (p. 5). Pauen (2012), writing from a philosophical perspective, agrees with this view and outlines three requirements for second-person perspective taking: it must draw on the replication or imagination of another’s mental state, it is conscious of a self–other distinction, and it is equally aware of a situational distinction such

that the perceived can distinguish the other person's situation from their own (p. 39). Moore and Barresi (2017) posit that “the experience of interaction may yield forms of information that are unique and critical for social understanding” (p. 1), a point echoed by Redcay and Schilbach (2019). Thus second-person knowing is increasingly recognized within the domain of cognitive science as a distinct epistemology.

In the works mentioned so far in this section, second-person perspective is conceptualized as a capacity to experience and understand the other, perhaps akin to empathy. Another way that the second-person perspective can be conceptualized is as an experience of co-creating knowing, or, thinking as one. In this conceptualization attention is put not only on the neural behavior of individuals in interaction; rather, the *interaction itself* is considered a unique entity with distinct characteristics. In considering the shift from a single-brain to multi-brain focus for studying and understanding the neuroscience of social interaction, Kaiser & Butler (2021) propose the concept of Social Breathing, which they describe as follows:

We use the term Social Breathing to refer to when a multi-person system becomes interwoven through the automatic, implicit, temporal and mutual sharing of social content. The model highlights both the multi-person process itself and the individual abilities that are necessary for engaging in it, as well as the experiential aspect of being interwoven with others. (p. 3)

Implied here is the idea that individuals engaged in social interaction create a *new entity*. This draws on the foundational work of philosopher and cognitive scientist Hanne de Jaegher. De Jaegher and di Paolo (2007) propose an enacted approach to social cognition that they call participatory sense making. This approach views *interaction* as primary in the meaning-making process. Centering interaction as the source of social cognition moves away from *either* viewing individuals as responding to environmental stimuli (solely externally stimulated) *or* as satisfying internal demands (solely internally stimulated) (de Jaegher & di Paolo, 2007, p. 487). The authors explain,

Social interaction is the regulated coupling between at least two autonomous agents, where the regulation is aimed at aspects of the coupling itself so that it constitutes *an emergent autonomous organization* [emphasis added] in the domain of relational dynamics, without destroying in the process the autonomy of the agents involved... (de Jaegher & di Paolo, 2007, p. 493)

The “emergent autonomous organization” reflects Maturana and Varela’s (1991) notion of *autopoiesis*—the self-organizing, -producing, and -maintaining nature of living systems. The living system, or *whole*, possesses qualities and characteristics that can be differentiated from those of its constituent parts. That the whole is a unique entity, more than (or at least different from) the sum of its parts, is an ontological standpoint viewing collective experience as more than transactional or even interactive. Rather, the whole is viewed as an emergent

entity worthy of attention and its own specific forms of inquiry. In this way, the second-person perspective has both an epistemological and ontological foundation.

To understand the ontological nature of second-person knowing more deeply, we turn from cognitive science to transpersonal psychology and the work of de Quincey (2000). De Quincey distinguishes between two levels of intersubjectivity. The first, which he describes as “weak-experiential” is defined as “mutual engagement and participation between independent subjects, which conditions their respective experience” (p. 138). This conceptualization is reflective of the second-person perspective that Moore and Barresi (2017) describe as “an understanding of intentional relations” (p. 1). De Quincey then conceptualizes the second type of intersubjectivity, described as “strong-experiential” as “mutual co-arising and engagement of interdependent subjects, or intersubjects, which creates their respective experience” (p. 138). It is here that we begin to touch on the phenomenon that is the focus of this paper, the knowing of the field, for while the autonomy of the interaction is recognized in some of the emerging thinking in social cognition, the emphasis remains on knowing sourced by the interacting subjects. De Quincey points to a different source, drawing on the work of philosopher and theologian Martin Buber. Buber (1966) eloquently describes this source:

In the most powerful moments of dialogic, where in truth “deep calls unto deep,” it becomes unmistakably clear that it is not the wand of the individual or of the social, but of a third which draws the circle round the happening. On the far side of the subjective, on this side of the objective, on the narrow ridge where I and Thou meet, there is the realm of between. (Buber, 1966, p. 55)

Thus, de Quincey concludes, “Buber gave ontological status to the “between”—a mysterious force, “presence,” or creative milieu, in which the experience of being a self arises” (p. 142). It is this territory we wish to explore.

While the differentiation of types of intersubjectivity is useful, we believe that the need for this differentiation arises from a conflation of two separate epistemologies under the second-person banner: intersubjectivity and trans-subjectivity. Just as it has been argued that the second-person perspective cannot be reduced to either the first- or third-person perspective (Moore and Barresi, 2017; Pauen, 2012; Redcay and Schilbach, 2019), we argue that the fourth-person perspective (trans-subjectivity or self-transcendence) cannot be reduced to a subsection of the second person (intersubjectivity).

Fourth-Person Knowing: The Missing Perspective

Fourth-person knowing has a particular quality of being neither my knowing nor yours, neither solely outside nor inside me but rather something beginning to articulate from a different source that operates beyond these distinctions. Returning to Varela and the redirection of attention described earlier, when the

act of redirection from object to source is applied to *collective* inner experience, what is that source? We identify it as the presence of the social field. Because the social field becomes known to us through our interactions, we have an intimate relationship with it, but the field also takes on its own autonomous beingness.

The beingness of the field is reflected in various forms of non-Western, holistic, and integrated cosmologies and epistemologies such as Daoism and Indigenous Knowledge Systems. Maori scholars Johnson, Allport & Boulton (2024) state,

Our worldview includes not only the interconnected ecological, social, psychological, or economic, but also the philosophical and spiritual, and the connection between the Atua (deities) and humanity. (p. 53)

The interconnection that gives rise to fourth-person knowing has been surfaced by Melanie Goodchild, Anishinaabe from Ketegunseebee First Nation, in her work on Relational Systems Thinking. In her dialogue with Haudonosaunee Elders, the source of knowing embedded in Indigenous knowledge systems surfaced repeatedly. Elder Dan Longboat shared, “the authority for our knowledge as Indigenous peoples has come from a place of spirit not out of the minds of men and women” (Goodchild, 2021, p. 88). That knowledge is communicated through an intimate relationship with the land, as Elder Rick Hill explains,

Knowledge is innately tied to the land, it’s right there, it’s waiting for us to pay attention to it, to guide us, through dreams, through visions, through practice, and maybe that’s our greatest strength, is getting people reconnected to the source of knowledge. (Goodchild, 2021, p. 89)

Juxtaposing Western research paradigms with Indigenous paradigms, Goodchild cites Opaskwayak Cree scholar Shawn Wilson, who points out that while Western paradigms emphasize individuals as the source of knowledge, in an Indigenous paradigm “knowledge is seen as ‘belonging to the cosmos’ and we humans are only the ‘interpreters’ of that knowledge” (Goodchild, 2022, p. 5). Thus the source of knowledge extends beyond the human, to land and all life, and to the cosmos. It is this perspective we find reflects the concept of fourth-person knowing that we are attempting to articulate here. At its source level, the *knowing of the social field* is an expression of that which is unique and yet universal, or cosmological, and which, through our presence, attention, and intimate relationship with it, can manifest through us.

Fourth-person knowing shows up in our individual experience, but it is not of our making. Nor is it of a specific interaction or intersubjective experience—it is not something that exists only between us. Rather, it is something within, between, and beyond us simultaneously. It is reflective of Rosa’s concept of resonance at its deeper levels: that we can establish a connection to the call of the world through both our inner and outer action in an encounter that

“transforms both sides, subject and the world experienced” (Rosa, 2018, p. 42). We further differentiate fourth-person knowing from existing epistemological perspectives in Table 1.

Perspective	Meta-category	Focus	Origin of Attention	Gesture	Epistemological Expressions	Research Methodologies
First person	Subjective	Me / I	Self-observation: <i>Bending the beam of observation back onto the source of individual emergence</i>	Looking within (self-observation)	Phenomenology Transpersonal psychology Consciousness studies	Auto-Ethnography Contemplative Practice Psychological Introspection
Second person	Inter-subjective	Yours / Ours	Dialogue: <i>Reflective practices at the level of face-to-face discourse</i>	Looking within and outside sequentially Looking at what is in-between	Social Psychology Social Constructivism Critical Theory Intercorporea Phenomenology	Dialogic Inquiry Collective Auto-ethnography Participative Action Research Participant Observation
Third person	Objective	Them / That	Observation: <i>Observer separate from (or exterior to) the observed</i>	Looking outside (mind and world are separate)	Natural science Naïve Realism Traditional Systems Thinking	Interviews Surveys Experimental Design Discourse Analysis
Fourth person	Trans-subjective	Emergent whole	Stillness- (or resonance-) based deep sensing: <i>Bending the beam of observation back onto the sources of collective emergence</i>	Looking within and outside simultaneously (decentered, distributed self; mind and world are not separate)	Transpersonal Social Psychology Objective Idealism Indigenous Knowledge Systems Daoism Theory U	<i>Work in progress:</i> System Sensing and Presencing Social arts–based research practices, such as 4D Mapping

Table 2. First-, Second-, Third-, and Fourth-Person Perspectives

We summarize the essence and implications of each of these epistemologies as follows:

Objectivity

Essence: This perspective seeks truths external to individual perception and biases. It's often associated with scientific methods, which strive to discover facts about the world uninfluenced by personal feelings or opinions.

Implication: A focus on positive, measurable phenomena (third-person view).

Subjectivity

Essence: The emphasis is on individual experience, awareness, and perception. What is considered truth can vary from one individual to another.

Implications: A focus on individual sense making (first-person view).

Intersubjectivity

Essence: This perspective is about shared meanings and understandings. Our personal experiences (subjectivities) might differ, but through exchange, common ground can be discovered.

Implications: An acknowledgment of the social construction of reality (second-person view).

Trans-subjectivity

Essence: This self-transcending human perspective encompasses broader systems of meaning and relationships, especially in relation to the planet (eco-centric) and the universe (cosmo-centric).

Eco-centric: Recognizes the interconnectedness of all life forms and ecosystems. Humans aren't just observers but also participants in a delicate balance of life, emphasizing harmony with (and as part of) nature.

Cosmo-centric: Situates our existence within the universe. It fosters a sense of humility and awe, recognizing our role on the planet and in the cosmos.

Implications: A more holistic worldview, where actions are weighed not just against human considerations but also against the wellbeing of all the other beings that humans are co-dependent and co-arising with (fourth-person view).

Fourth-Person Phenomena

We have outlined the generic properties of fourth-person knowing that distinguish it from other epistemologies. But how does it show up in our lived experience? As an action research concept, the fourth-person perspective has become known to us through our work designing and facilitating Theory U processes for transformative change. Over the past 20 years, with our Presencing Institute (PI) colleagues, we have brought Theory U processes to institutions and organizations facing real-world challenges around the world¹ and have used Theory U to support wide-scale grassroots action through capacity-building, as well as multi-local and multi-regional activation at scale.²

Two years ago, we began a deep-dive inquiry into a form of knowing that could not be described as exclusively first-, second-, or third-person. We drew on both personal experience and action research data, initially using existing data sources from previous research, and then seeking out new perspectives. A summary of our data sources is listed in Table 2.

Data Source	Timeframe	Description
u-lab Scotland participant interviews	2015–2016	Eight individual and two group interviews totaling 12 interview participants (Pomeroy & Oliver, 2018, 2021).
u-lab Concordia Social Innovation Hub participant interviews	2017–2018	Thirteen individual and two group interviews totaling 17 interview participants.
Berlin Moment Inquiry	July 2019	We revisited the social field experience described as The Berlin Moment in Theory U (see Scharmer, 2018, pp. 109–114) in a reflective “fishbowl” dialogue at the Presencing Institute’s Social Field Research summer school in Berlin.
GAIA Surveys	March–June 2020	We conducted three surveys of participants in the first, ninth, and final GAIA sessions. Responses were received from 503, 449, and 273 participants, respectively.

¹ For examples, see <https://www.u-school.org/acupuncture-points>

² Our signature online capacity-building programs are u-lab 1x and u-lab 2x, engaging over 200,000 individuals and one thousand teams working on systems change projects.

GAIA (Global Activation of Intention and Action) Journey was a global activation initiative launched in response to the first wave of the COVID-19 pandemic. A global community of over 15,000 people took part in online community sessions and asynchronous practice groups.

At the regional level, PI works with partners to support three ecosystem activation programs: Ecosystem Leadership Program in Latin America, Ubuntu.Lab in Africa, and United in Diversity in Asia.

GAIA Focus Groups	April–June 2020	Twenty-two individuals from 16 countries participated in four focus groups that were formed during GAIA. Two groups met monthly and two bi-monthly.
Circle of Seven (Co7) Reflection Interview	June 2022	Otto Scharmer interviewed the Co7 members in 2003 as part of the Leadership Dialogues that gave rise to Theory U (see Scharmer, 2016, pp. 151–152; 174–182). In 2022 we interviewed three members, soliciting their reflections on inner collective experience.
Interview with Marian Goodman	April 2023	This interview focused on Marian Goodman’s 10+ years of facilitating Presencing Foundation Programs, exploring social field patterns she observed and experienced over time.
GAIA Focus Group Reflection	April 2023	One of the original GAIA focus groups came together to reflect, three years later, on the impact of their participation.
Interviews with Visual Scribes	July 2022	We interviewed three visual scribes (our Presencing Institute colleagues) about their experience of Generative Scribing, a method which “calls particular attention to an emerging reality that is brought to life by, and for, the social field in which it’s created” (Bird, 2018, p. 1).
SDG Leadership Lab Liberia	2023–2024	We drew on the action research project of our colleagues who co-facilitated the Liberia SDG Leadership Lab initiative. They are engaged in an action inquiry about the lab which includes: deep-dive sense making of their own experiences, nine individual interviews with lab participants, and a collective reflection and sense-making dialogue with twelve participants.

Table 2. Data Sources.

These data sources have all contributed to our understanding of the phenomena we describe here. We compared emerging data with existing data and with that from our own experiences in an iterative, inductive process of dialogue, data immersion, and reflection. Through this process we arrived at five phenomena we believe point to fourth-person knowing and distinguish it from existing epistemological forms, as follows:

1. Fourth-person knowing is experienced as something that is looking at me but isn’t me, a beingness that is not me and yet does not manifest in my/our absence.
2. Fourth-person knowing shows up in our individual experience as a distinct mode of decentering of perception, including a shift in the way we experience space, time, self, light, sensation, and warmth.
3. Fourth-person knowing comes with a heightened sense of possibility in which a future potential, that was previously experienced as out of reach, moves inside the horizon of what feels doable and possible.

4. Fourth-person knowing tends to manifest with an enhanced co-presence of the whole and the individual, making possible the freedom to align individual and collective attention, intention, and agency.
5. Fourth-person knowing tends to activate longer-term generative social fields that give rise to sustained and significant practical results.

We expand on these points below.

You Are Not Alone

1. Fourth-person knowing is experienced as something looking at me that isn't me; a beingness that is not me and yet does not manifest in my/our absence.

Fourth-person knowing is experienced as a beingness that is not me but that attends to me and of which, in a certain moment, I can be very subtly aware. It can communicate with me and, if I attend to it, it has the capacity to pull me forward. Martin Buber (1970) in his seminal *I and Thou*, writes, "This is the eternal origin of art that a human being confronts a form that wants to become a work through him" (p. 60). All creative processes increase your ability to become a channel for what wants to emerge.

Artists recognize this beingness: it is often experienced as the deeper essence of the creative process. In 2004, Ed Bradley, a host of the American television news magazine *60 Minutes*, interviewed legendary singer-songwriter Bob Dylan. He quoted Dylan's autobiography, in which Dylan writes, "I was heading for the fantastic lights. Destiny was looking right at me and nobody else" (Dylan, 2004, p. 24). Later in the interview, having reviewed Dylan's long career, Bradley asks, "Why do you still do it? Why are you still out here?" Dylan replied, "Well, it goes back to the destiny thing. I made a bargain with it a long time ago and I'm holding up my end" (60 Minutes, 2004).

The nature of Dylan's "bargain" is not so much to craft songs, but rather to allow songs that want to be written to manifest through him. This is something he described repeatedly over his career. In the interview with Bradley, he says, "It's like a ghost is writing a song like that, it gives you the song and it goes away. You don't know what it means. Except the ghost picked me to write the song" (60 Minutes, 2004).

This experience finds resonance with the author Elizabeth Gilbert, who also speaks to the experience of being seen by a beingness that communicates with her. She describes her understanding of the creative impulse like this:

I believe that our planet is inhabited not only by animals and plants and bacteria and viruses, but also by *ideas*. Ideas are a disembodied, energetic life form. They are completely separate from us, but capable of interacting with us—albeit strangely. Ideas

have no material body, but they do have consciousness and they most certainly have will. Ideas are driven by a single impulse: to be made manifest. And the only way an idea can be made manifest in our world is through collaboration with a human partner (Gilbert, 2016, pp. 34–35).

She describes the way we often fail to hear the idea or choose to ignore it but how, under the right conditions, we are more receptive to it. She explains, “And then, in a quiet moment, it will ask, ‘Do you want to work with me?’” (Gilbert, 2016, p. 36).

While this characteristic of fourth-person knowing is perhaps the most difficult to articulate, we believe it is quite common. Twenty years ago, as part of the interview series that led to the creation of Theory U, Otto sat down with the Circle of Seven, a group of women with a deep commitment to exploring the unfolding process of transition and transformation by coming together regularly with rituals and processes to support their exploration. In the interview, the group explicitly recognized an entity bearing witness to their process. They describe it in this way:

I feel like a bigger person. I feel fuller in my own being. And I feel empowered or enabled in a particular way. I feel seen. I feel the focus of attention is refined; that it’s nonjudgmental, and loving. And I feel the presence of the Circle Being, which is different from the sum of the individuals. (Scharmer et al., 2003, p. 22)

What they call the Circle Being is one of the clearest articulations of fourth-person knowing that we have come across, and it continues to guide our thinking. It emerges through our shared attention and intention but is a distinct entity in its own right, with its own knowing and intentionality. Reflecting more recently on the experience of the Circle of Seven, circle member Glennifer Gillespie commented:

It's so hard to talk about, because it does really feel as though we've entered another realm, and yet the realm is somehow familiar. But also, it feels partly generated by us. My sense is it's partly the presence of something that's already there anyway, so it feels like a recognition. (Glennifer Gillespie, 2022, Circle of Seven Interview)

We have worked for many years with leaders of many kinds, including founders and CEOs of companies and social enterprises. We often ask participants in this deep leadership work to contemplate the beingness of their organization with a question like this: *If your organization were a living being that could feel, what feelings would that being have at this moment?*

Contemplating that question, they “sense into” that space and jot down whatever feelings come to them. Then we ask: *If your organization were a living being that could speak, what would that being say to you now?* That question, when asked in this context and manner almost always generates profound and

surprising responses. From a social field perspective, the organization is a living being with its own interiority, intention, and *voice*. This voice, the expression of fourth-person knowing, is what we believe surfaces in participants' contemplative journaling practices. In subsequent conversations we have never been told that they found these questions too abstract or inappropriate. On the contrary, most participants find the questions the most helpful and natural because they acknowledge and bring to the surface of attention their deeply held relationship with the living being (the organization) that was always there but not attended to in a conscious manner.

Perception Begins to Happen from the Field

2. Fourth-person knowing shows up in our individual experience as a distinct mode of decentering of perception, including a shift in the way we experience space, time, self, light, sensation, and warmth.

Fourth-person knowing has a specific aesthetic or felt sense. It shows up in our individual experience and is known to us as a distinct and identifiable sensory experience. Like the beingness described above, it is a sense that there is something that moves through me, on a sensory level, but is not of me. Because of this sense that it "is not of me," it is different from first-person subjective experience. Consider this description of a social field from a reflective journaling exercise:

What stood out for me was this warmth. But there was a surprising answer for me in the journaling as well. It felt, and it feels now, as if I remember something, as if I'm recollecting something that I have lived before. It's like a feeling that I already had, and I have forgotten. Or I have filtered it out so I couldn't see it before then. (Nebojsa Illijevski, 2023, Focus Group Reflection)

The sensory nature of the experience is something we often hear from others describing their experience of generative social fields: the space feels warm, time slows down, the light shifts, experience thickens, and there is a sense of familiarity or recognition that the experience is not new. Our colleague Dayna Cunningham describes one such moment in this way:

There was no time. There wasn't time. It was out of body. It was suspended. I was on the edge looking into the center and, and the word that just keeps coming that seems so inadequate is "thick." There was just such a thickness that I think was about the holding. It was about the compassion. But thick is the word. Feeling held. (Dayna Cunningham, 2019, Berlin Moment Dialogue)

For those paying attention, these moments announce themselves with a sense of foreshadowing and a knowing "in the air" and in one's being that something important is happening. It is a felt resonance with the field that surfaces both before and after a collective shift. Generative scribes know this

experience well. Their work involves intentionally connecting with the social field in order to express it visually, so they are particularly well attuned to the field. Each scribe we interviewed for this article spoke of threshold moments when a collective (group) shifts from one kind of operating and awareness to another. Generative scribe Jayce Pei Yu Lee told us, “There's a space of uncertainty. It's kind of ambiguous. But I can feel like, "Oh, there's something there that's cooking" but it's not come to shape yet” (Jayce Pei Yu Lee, 2022, Individual Interview).

This sense that there is something emerging or about to emerge is what we refer to as not-yet-embodied or self-transcending knowing (Scharmer, 2001). Another way to think about this is as potential that has yet to take form. It is sensed or known through subjective experience but isn't purely subjective. Instead, it is the individual perception of potential held within the collective space. Beth Jandernoa, a member of the Circle of Seven, shares her experience holding these moments as a facilitator:

I know we're getting to the threshold when I feel my chest start to open. It feels as though my whole chest is opening up and then I recognize we're there, at the threshold. Then I have a choice—literally physiologically—to keep opening to and with the threshold that is unfolding. (Beth Jandernoa, 2022, Circle of Seven Interview)

Beth then goes on to describe the way her own perception shifts in these moments.

I notice that my seeing shifts from seeing from my regular outer oriented state to seeing with my “inner eyes.” My inner eyes seem to show up in my whole body as though my body becomes my eyes and I'm seeing with every part of me. It's more like 360-degree seeing, rather than just seeing what's in front of me. I'm more here, but I'm also more everywhere. My expanded experience of my own presence deepens in my body yet includes everyone and whatever is in the space. (Beth Jandernoa, 2022, Circle of Seven Interview)

In this situation, the nature and source of perception itself shifts. It moves from a centered perspective—inside my center looking out—to a decentered, multi-local source of perception. This is something we sometimes hear expressed as feeling outside one's body. Rather than seeing this as an out-of-body experience, we view it as *perceiving from the collective body*. The ability to perceive from a panoramic field awareness is the underpinning of connecting with not-yet-embodied knowing and supporting its manifestation as emergent embodied and explicit knowing.

Presencing Institute senior faculty member Marian Goodman describes what happens in moments of connecting with the knowing of the field in this way:

Something does slow down. The relationship to chronology and the sense of separateness completely shifts in experience. Something gets more primal if you like. So slowing down, a change of frequency, and a change of orientation. What you start paying attention to, or what starts getting your attention is different. There's a shift of focus, and I think that shift of focus is the interiority of the field. I think that's where your awareness goes to because there is this sense of loss of personal self, the small ego self, in space and time but an enlarging of presence in the slowdown. So, you're very much in time, because you're right now, and you very much in space, because you're right here. (Marian Goodman, 2023, Individual Interview)

While we have few concrete words and concepts with which to describe the fourth-person perspective, there is a familiarity in. It is a felt experience, rather than an emotional response to events, which would fall within the subjective realm. As described by both experienced social field practitioners and those new to the social field approach, the sensory nature of fourth-person knowing is experienced as qualitatively distinct from subjective experience that arises from within the boundaries of our own being.

Who I Am and What I Do Matters

3. Fourth-person knowing comes with a heightened sense of possibility in which a future potential, that was previously experienced as out of reach, moves inside the horizon of what feels doable and possible.

Connecting with fourth-person tends to result in a profound sense of empowerment as a new range of what is possible comes within reach. Nebojsa Illijevski, from North Macedonia, knows this phenomenon well. Having participated in Theory U capacity-building programs, Nebojsa had been working to integrate the framework and related practices into his work at Public, the Association for Research, Communication, and Development, where he and his colleagues publish a street paper, among other projects. The paper is sold by individuals who live in marginalized communities, thus creating employment for these individuals and groups. From this work, Public developed a social mentoring program that helps people who have had difficulty entering the labor market to do so. Public was in the process of developing this work when the pandemic began and Nebojsa joined the GAIA (Global Activation of Intention and Action). The initiative was launched by the Presencing Institute in March 2020 just as Covid-19 lockdowns, quarantines, and suspension of business-as-usual confronted the world with acute disruption. The initiative brought together a global community of over 15,000 change makers to sense into the moment of acute disruption and seed new possibilities from that place. Bi-weekly online gatherings included guest speakers, dialogue, and contemplative and social arts practices, which were complemented with asynchronous small-group processes in

self-organized Solidarity Circles. Reflecting on his experience and its impact on his own actions and agency, Nebojsa told us:

It felt like I was putting my mask down, you know, losing my persona, so I could come more authentically into the spaces where I was gathering with people. Since then, it feels like I have turned into a magnet that attracts the people I really want to be with. And that has led to really tangible results. I would say it's something that I can see. (Nebojsa Illijevski, 2023, Focus Group Reflection)

The tangible results Nebojsa mentions are significant. In the few short years since we met him in 2020, Public has expanded and brought the methodology from Macedonia to four other Balkan countries, supported by a partnership with GIZ (the German Agency for International Cooperation).

How do we understand the relationship between engaging with a generative social field and the activation of agency? Interestingly, the answer is reflected in Nebojsa's own words. During a journaling exercise, his focus group was invited to engage in some imagery work, focusing on GAIA as a social field. In the dialogue following the journaling exercise, Nebojsa shared, "If the social field of GAIA can speak, it says, 'It's open: pass.' The voice is not that gentle. It's a very determined voice. 'Pass, it's open.' It's a very clear calling" (Nebojsa Illijevski, 2020, Focus Group).

Nebojsa described his surprise that the voice that spoke to him in the journaling was not his own. It is this voice that we refer to as the fourth-person perspective. The specific message from the social field is a future-oriented form of knowing that connects us to a sense of possibility with which we can choose to engage (or not). Hodgson (2013) describes the present moment as a pattern of actual and latent experiences and our experience of the present moment as varying with our state of consciousness. While the present moment can be *thin*, meaning of short duration or with a narrow range of awareness, it can also be *thick*, "where we embrace the entire field of our concerns and do so through an expansion of our awareness range" (p. 29).

Elizabeth Gilbert beautifully describes the experience of the thick present and the consequent relationship we have with the calling of an idea that wants to manifest. She says, "The simplest answer, of course, is just to say no. Then you're off the hook. The idea will eventually go away...you don't have to do anything." (Gilbert, 2016, p. 37). The alternative, of course, is to say yes. In the face of this response, Gilbert says, "Now your job becomes both simple and difficult. You have officially entered into a contract with inspiration, and you must try to see it through, all the way to its impossible-to-predict outcome" (Gilbert, 2016, p. 38). So the experience of fourth-person knowing is about entering into partnership with the beingness of the social field. It is an intimate relationship, and it brings agency within reach because there is a calling to which you choose to give yourself (even though you don't know what it will lead you to). Beth Jandernoa reflects further:

It seems to me as though this inner collective holds real promise for what the world or life is calling for. It's the edge or dynamic frontier that holds some kind of key that taps into a creative realm that is always present, but we don't access it very often because it is clouded by our usual consciousness. (Beth Jandernoa, 2022, Circle of Seven Interview)

In connecting with fourth-person knowing, we become aware of a larger presence holding us. It was always there but beyond our attention and it calls us toward action. We depend on it and it depends on us.

Whole-in-the-Parts and Parts-in-the-Whole

4. Fourth-person knowing tends to manifest with an enhanced co-presence of the whole and the individual, making available the possibility and freedom to align individual and collective attention, intention, and agency.

Fourth-person knowing is born of the intimate relationship between individual and collective intention and attention. It tends to surface through co-presencing experiences in which individuals experience themselves in the whole and simultaneously experience the whole within themselves. Through this experience of whole-in-the individual and individual-in-the-whole, individuals can gain a heightened sense of their own place, and with it the freedom to exercise agency that aligns with a shared intention and attention.

To illustrate the intertwined relationship between individual and collective agency and intention, we turn once again to our experience of the pandemic-response initiative, GAIA. Throughout the three-month process, we collected data on the participants' experiences through surveys, focus groups, and dialogic sense making of the results. (Pomeroy et al., 2021). We draw on that data here.

In the first instance, as individuals encounter the shared intention of a collective, they are often able to see a greater whole and hold this whole in their awareness. Participants commented:

I feel more centered and [can] "focus on a wider plane." (GAIA Final Survey)

Seeing and hearing from all over the world gave me a sense of the global scale of this kind of engagement, my body-heart-mind is part of a large evolutionary movement of body-heart-minds. (GAIA Final Survey)

These descriptions are not those of an outside observer, or a third-person perspective; rather, this expanding perception of the whole *includes* the observer. When people see themselves as a part of that community or ecosystem, something interesting and essential happens: they begin to see themselves through the lens of that whole. We hear this often. Consider this reflection from Luis Dominguez:

When the speaker was speaking last Friday, I made a connection with myself and with somebody that I love. I felt that what was happening in the session had something to do with me personally. (Luis Dominguez, 2020, GAIA Focus Group)

Taking the second statement into consideration, what or whose is the voice that led Luis to feel that the live session, with thousands of participants, had something to do with him personally? Clearly the speaker was not directing her comments to Luis specifically, so this experience was not about an interpersonal interaction or second-person, intersubjective knowing. Yet there was something happening that felt important and deeply personal, the source of which is difficult to pinpoint. *This* is what we recognize as fourth-person knowing. It is knowing that shows up in our personal experience but is not of us. Rather, it is sourced by the field and accessed through our individual and collective attention.

When people connect with fourth-person knowing and see themselves from the whole in this way, their relationship to the whole changes. Instead of losing themselves in a sense of oneness, people seem rather to see their individuality and dormant potential more clearly. Pedro Perez Guillon, a GAIA participant from Chile, expressed it in this way:

I saw in others my own dreams, and it made me realize that these are collective forces shaping our common futures. I felt like a seed at the arrival of spring...feeling the magnetic pull of collective blooming. This gave me a great sense of trust in this inner force that wants to emerge in all of us. As a natural, organic, regenerative force that reshapes ourselves, our work and our culture. (Pedro Perez Guillon, 2020, Personal Communication)

Developmental psychologist Michael Tomasello (2022) describes the characteristics of human agency that make us distinct in the evolutionary line. He tracks the evolution of agency from the goal-directed agency of lizards through the intentional agency of mammals to the rational agency of large apes. The evolutionary step in this lineage that distinguishes humans from other species is our capacity to enter into shared agency. Tomasello (2022) writes,

Early humans thus for the first time began putting their rational heads together with a partner to form a joint agent to pursue a joint goal together. These collaborative activities were dual level in the sense that they comprised a shared level of joint goals and joint attention, on the one hand, and an individual level of individual roles and individual perspectives, on the other. We might think of these as two *modes* of agency. (p. 101)

So, the distinct characteristic of human agency is our ability to align our goals and attention collectively or, put another way, to create shared fields of intention and attention. We have the capacity to enter into shared agency and co-shape our future in a way that other species do not, and we experience individual agency in relation to this shared agency.

What is essential here and what distinguishes fourth-person knowing from other, more malevolent forms of collective experience, such as groupthink (Janis, 1997) or incohesion (Hopper, 2009)³ is *the freedom to choose to enter into collective attention and intention*. This is a hallmark of fourth-person knowing: it is not manipulative. Rather, having gained a heightened sense of the whole and my place in it, I can choose to make myself available for what wants to move through me. The experience is one of simultaneous agency and surrender. Buber (1970) writes, “The You [social field] encounters me. But I enter into direct relationship to it. Thus, the relationship is election and electing, passive and active at once” (p. 62). Aboriginal scholar and artist Tyson Yunkaporta, of the Apalech Clan, Queensland, describes the relationship between individual and collective agency in this way:

You must allow yourself to be transformed through your interactions with other agents and the knowledge that passes through you from them. This knowledge and energy will flow through the entire system in feedback loops, and you must be prepared to change so that those feedback loops are not blocked. (Yunkaporta, 2020, p. 87)

And just as an encounter with the social field changes us, so do we change it.

“Shockingly Effective”

5. Fourth-person knowing tends to activate longer-term generative social fields that give rise to sustained and significant practical results.

One of the ways we felt we could come to know the fourth-person perspective in the data and in our own experience was through its impact. As reflected in Nebojsa’s story, connecting with the experiences described in the points above is accompanied surprisingly often by a profound shift in the way people collaborate and the practical results they produce. In the words of psychologist Eleanor Rosch, “action from awareness... can be shockingly effective” (see Scharmer, 2016, p. 166).

One such experience was the UN Sustainable Development Goals (SDG) Leadership Lab in Liberia. Co-designed by UN leaders and the Presencing Institute, the lab brought together leaders of the 25 UN agencies in Liberia (the UN Country Team), members of civil society and government officials, online and in person, between October 2022 and January 2023. Together they moved through a facilitated process of awareness-based systems change. Interested in better understanding the experience of the lab and its impact, the facilitation team engaged in an inquiry process, first through their own structured reflection,

³ See Bockler (2023) for a full discussion of the shadow side of groups.

then through interviews and focus groups (see Table 2). In summarizing their own experience, the team—Liz Alperin Solms, Teo Iordache and Sharon Munyaka—shared,

From the lab’s outset, we experienced flow and awe and “just-rightness” and the felt sense that it just might be transformational. This is not to say all was perfect. All was not perfect. The challenges in Liberia are immense: the poverty, the corruption, the deep wound of 20 years of war, the lack of infrastructure. But we felt drawn into an ecosystem that had a felt sense of “readiness,” and there was a sense of flow or “being guided” through the six months of the Lab. (Liberia SDG Leadership Lab Facilitation Team, 2023, Action Inquiry Reflection)

While the program itself was relatively short, the prototypes that emerged from the lab are striking for their significance and scale. They include:

- “Initiation without Mutilation” emerged as a prototype working with local leaders and wisdom figures to replace female genital mutilation (FGM) with alternative cultural practices that honor rites of passage and the associated social and economic structures.
- The “We Are One Liberia” public relations campaign was created to engage civic society and public personalities to promote a common, positive Liberian identity in advance of an upcoming national election. The 2023 elections were heralded as an overwhelming success, marking a peaceful transition of power in a country historically plagued by coups and political unrest.
- A UN Hub was created in a region of the country cut off much of the year by impassable road conditions, allowing resources to be allocated and directed through local decision making rather than nationally.

Perhaps the greatest impact from the lab wasn’t the initiatives that sprang from it but rather the shift leaders experienced in their perceptions of themselves and their role. The head of one agency shared that she came to understand that, by walking around in the morning before work and having coffee with the agency’s drivers, she’s doing the important work of sensing what’s needed. A senior official from the evaluation office instinctively recognized that he couldn’t do yet another country assessment by sitting in his office reading research reports, and instead immediately set out to talk with relevant colleagues in other UN agencies, and individuals from both civil society and government. And the head of UN Women opened the agency’s work so that community groups, NGOs, women’s groups and local government can participate in planning, leading and

implementation of initiatives. One young member of civil society and a leader in the international NGO community said:

Personally I realize I want to do something at a higher level to have more access to influence change. I see the potential to do that, and I wouldn't have had access to that information. I wouldn't have been able to imagine that I could influence change at a country or national level. But I have. That's something to be proud of and to work towards. (Aisha Lai, 2023, Liberia SDG Leadership Lab Action Inquiry)

All of these initiatives and shifts emerged from an experience involving just 30 cross-agency leaders over the course of roughly six months. How is that possible? Liberia's UN Resident Coordinator reflected on the effect of aligning collective attention and intention. In referring to a "system mapping" exercise that uses embodiment to support the sensing of the system, he noted:

It was a feeling that there was an ecosystem (to use an overused phrase), which actually enabled people to understand that they all had an importance, and their absence in terms of commitment would have been difficult. That stood out very clearly for me at the time. (Niels Scott, 2023, Liberia SDG Leadership Lab Action Inquiry)

Through the lab experience, a way of knowing and understanding the system and one's place in it becomes available where it hadn't been before. We argue that this knowing catalyzes new action. The source of this knowing comes not from any one individual or group, nor from the facilitation team for that matter. Rather, it is a source of knowing that until now has been little named, yet is felt and recognized—it is knowing that is accessed rather than co-created. Facilitator Liz Alperin Solms shared this:

It felt as though we were on the precipice of what wanted to happen next—as if something was communicating with us. We had an existing plan, but it just became clear to us what had to happen. (Liz Solms, 2024, Personal Communication)

We maintain that fourth-person knowing, and the dormant potential it holds, is always available. While always present, however, it is not always evident. High-quality or generative social fields provide the conditions for making fourth-person knowing accessible.

Realigning Attention, Intention, and Agency

While we have articulated the five points above as separate and distinct for the purpose of illuminating their properties, in reality they are all aspects of a unified experience. What is the epistemological code and the deeper nature of that experience? In a book that dives more deeply into these experiences, it is characterized as having the following two epistemological turns:

1. Attention, if deepened, gives rise to Intention.
2. Intention, if deepened, gives rise to agency.

(Scharmer & Kaufer, *forthcoming*)

The journey down the left-hand side of the U is essentially about the first principle: deepening the understanding of the relevant multiple perspectives in a social context in a way that gives rise to the underlying intentionality: not only what currently is but also the future that is wanting to emerge through us.

The first three features of fourth-person knowing refer to this first epistemological turn: attention giving rise to intention: (1) through me but not of me; (2) decentering my perception of time, space, sensation, and self; and (3) a heightened sense of possibility and potential that is inside my field of agency. The last two are more clearly connected to intention giving rise to agency: (4) co-presencing of the whole-in-the-individual and of the individual-in-the-whole, leading to shared context and alignment of intention, attention, and agency; and (5) significant long-term impact and practical results ('shockingly effective').

Toward an Epistemological Grounding for Societal Regeneration

In drawing the various loose ends together, we would like to end with four summary points.

First, we started this article with the proposition that the number one challenge of our time is not climate change, the falling apart of our societies, or the proliferation of artificial intelligence. The primary challenge we face is the widely shared sense, particularly among young people, that perhaps it is already too late to change course. We know what the problems are. We know what the solutions are. But we are not implementing them. This observation framed the backdrop of our inquiry: What would it take to address the massive knowing-doing gap that defines our current moment? In our view, what we need is to activate a form of knowledge and knowing that goes beyond the traditional constructs around which much of our learning, knowledge, and leadership systems are organized: fourth-person knowing. Although its articulation may be new, we have been working with this kind of knowing in large-scale transformation and ecosystem activation journeys for more than two decades and have experienced its effectiveness across contexts and geographies. We know it very well experientially, as do many practitioners of transformation processes, but because it doesn't fit any of the pre-existing categories of knowledge creation and learning we don't talk about it.

Second, this deeper level of knowing comes with a set of distinctive experiential properties. We described five of them here: (1) knowing that comes through me but is not of me; (2) decentering of perception, including time, space, sensation, and self; (3) a heightened sense of possibility and potential in which something that appeared to be unattainable suddenly is experienced as in reach;

(4) feeling your own agency in helping ‘the universe’ (the larger social field) to evolve (co-presencing of the whole-in-the-individual and vice versa); and (5) significant long term impact in terms of practical results (‘shockingly effective’). The list is not necessarily exhaustive, but it draws our attention to a deeper level of experience in complex processes of change that is usually not attended to because we lack a vocabulary for it.

Third, fourth- person knowing, the knowing of the field, can be learned. It is, in fact, already recognized by many. Ed Schein, in his work on organizational culture, gave language to that which was tacitly known but unarticulated in organizational life. He defined culture as “the set of shared, taken-for-granted implicit assumptions that a group holds and that determines how it perceives, thinks about, and reacts to its various environments,” and he notes that it is “one of the most powerful and stable forces operating in organizations” (Schein, 1996, p. 231). Here we similarly attempt to give language to that which is known but underarticulated. In our case, we look not so much at what culture *is*, but rather at what is inside its *making*—the beingness of the whole and the knowing that resides there. Given that many change makers and practitioners have had experiences of fourth-person knowing, the potential for it to become a central tenet of future learning, knowledge-creation and leadership is significant.

Fourth, we are clearly at the very beginning of exploring a new metacategory of thinking and acting that moves beyond the traditional forms of objective (third-person), subjective (first-person) and intersubjective (second-person) knowing, and that may give rise to more holistic attention, intention, and agency based on knowing that we tentatively framed as a fourth metacategory of trans-subjective or self-transcending knowing. The more we understand these deeper epistemological and ontological foundations, on which all the other forms of knowing tend to arise from and return to, the better our frameworks will serve the deeper evolutionary needs of our societies and our planet as we gradually shift from polycrisis and collective depression to polysystemic regeneration and collective agency.

Sherri Mitchell, Penawahpskek from the Penobscot Nation, writes,

As we move through these challenging times, it is important to remember that none of us are here by accident. We entered this world with the express purpose of facilitating the changes that are manifesting during this time, and we brought with us the gifts needed to accomplish that task. None of us are out of time or out of place, though many of us remain out of step with our true path. Our unique imprint is essential to the larger pattern that is unfolding. (Mitchell, 2018, p. xx)

It is our hope that by articulating and centering fourth-person knowing we can provide an epistemic basis for individuals and collectives to recognize, connect with, and manifest what is theirs to do—their “unique imprint”—within the wider pattern and movement arising in our current moment.

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Peer Review Article

Te Ruru:

Co-creating an Indigenous Systems Change Framework

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Abstract

Indigenous cultures have long-held perspectives that emphasise the interdependence of all living things as holistic systems. Our worldview is thus shaped by deeply embedded relationality, which is in constant response to our interconnected experiences and knowledges. Systems thinking is a way of looking at the world that recognises the interconnectedness of both natural and human-made systems. The systems change approach, which takes into account the interconnected nature of the world's economic, social, and ecological systems, finds common ground with an inclusive, connected Indigenous holistic world view. This article explores the congruence and compatibility between systems change thinking and Indigenous frameworks, emphasizing their common ground. The article introduces an example from Aotearoa New Zealand, which has integrated the tenets of systems change methodology within tribally based principles and aspirations to create "Te Ruru". Te Ruru, an Indigenous framework of systems change, has been designed by a tribally owned Māori (Indigenous peoples of New Zealand) health research centre to investigate the overarching system(s) that perpetuate inequity of Māori health outcomes. Te Ruru is depicted in three parts: the first part, or micro lens; the second part, the macro lens; and part three, the meso lens. The first part of the framework

prioritizes Indigenous identities and values. In part two, Te Ruru's beak, eyes, and wings symbolize the translation of research findings, strategic oversight, and the ability to navigate systems change. The third part of the framework illustrates the goal of new mātauranga and the need to address internal barriers and traumas, emphasizing the necessity for healing and restoration to sustain long-term systems change. A case study of how Te Ruru has been used in conjunction with a research methodology (TUI) is also included. Te Ruru has been purposefully adapted from a specific tribe's knowledge and iterated to represent not just the visible system(s) that Māori communities occupy, but also the 'unseen' within Indigenous and colonial histories. Using systems change from an intentional Indigenous paradigm is thereby an act of decolonisation—a direct act against the systems currently blocking Indigenous flourishing. Te Ruru's transformational power lies in its ability to bring to the surface the seen and unseen, and thereby support Māori to take the helm to lead systemic change via the Indigenous translation of inclusive health research.

Keywords

Indigenous systems change, Māori systems change, Indigenous worldviews, Ngāti Hauiti, Whakauae Research, Indigenous health, Indigenous research

Introduction

“You cannot change a system unless you transform consciousness. You cannot transform consciousness unless the system senses and sees itself.” (Scharmer, 2018, para 18)

“He kokonga whare e kitea, he kokonga ngākau e kore e kitea – a corner of a house may be seen and examined but not so the corners of the heart.” (Māori whakatauki (proverb))

Systems thinking is a way of looking at the world that recognises the interconnectedness of both natural and human-made systems “by invisible fabrics of interrelated actions” (Senge, 2006, p. 7). The lens of systems change provides us with the ability to recognise and articulate contemporary “wicked” problems (Waddock et al., 2015) as originating from the way our systems are designed and structured, rather than being separate, stand-alone problems. Systemic change examines interrelationships between fundamental structures, to “...clarify what it means to shift conditions that are holding a social or environmental problem in place” (Kania et al., 2018, p. 3). Underpinning systems transformation efforts is the drive for equity, shifting the dynamics of power and attempting to identify the underlying causes of the challenging issues (Kania et al., 2018). Systems change entails challenging the status quo, striving to create more just and equitable systems. It demands the implementation of regenerative approaches to effectively address the world's complex and deeply entrenched challenges (Marshall & Twill, 2022). This article establishes a relationship between systems change thinking and an Indigenous worldview in

order to make the case for their congruence and compatibility, a space in which new mātauranga (knowledge) can emerge and flourish. Whakauae Research Services Ltd is an Indigenous research centre that specialises in Māori (Indigenous peoples of Aotearoa New Zealand) health and development research. Situated on the lower North Island of Aotearoa New Zealand, Whakauae Research was developed out of the dreams and aspirations of the people of Ngāti Hauiti, as part of the ongoing journey of tribal revitalisation (Boulton et al., 2023). Members of the Iwi (tribe) descend from the eponymous ancestor Hauiti, who was a descendant of Tamatea Pōkai Whenua, one of the ancestors who journeyed in the Tākitimu waka (canoe) during the ‘great migration’ in the 1300s (Potaka & Butts, 2006). Today, Whakauae Research operates with the aim to further Ngāti Hauiti development and wellbeing, and that of Māori as a whole. Our values (tikanga) have been handed down by the elders of Ngāti Hauiti, which direct us in a constant process of “reclaiming the intellectual traditions, reviving ancient teachings and re-applying the knowledge of ancestors” (Allport, Johnson & Bennett-Huxtable, 2023, p. 3). As Indigenous researchers who are also pan-tribal (descending from Iwi who are not Ngāti Hauiti), we operate from ‘responsive Indigenous standpoints’ (Yunkaporta & Shillingsworth, 2020), which means for us that we exist by positioning our own whakapapa (genealogy), whenua (land), tikanga (values), and mātauranga (knowledge) in relation to that of others, and with the core belief of connection (whanaungatanga). The specific focus of this article is to outline a systems change framework which has been developed within this tribally (Iwi) owned health research centre in Aotearoa New Zealand, with the express aim of allowing researchers within the centre to take a whole-of-systems approach to Māori (Indigenous peoples of New Zealand) health research.

Colonising Systems

Aotearoa New Zealand is a country in the South Pacific that was colonised by Britain in the 19th century. As a result, Māori, like many other colonised peoples around the world, have suffered from a wide variety of negative effects stemming from colonisation. Systemic disparities in social, economic, educational, and health outcomes for Māori are reinforced by the Western system (Came-Friar et al., 2019), which operates across multiple levels of governance in Aotearoa New Zealand. A large corpus of evidence demonstrates how the primary health care system in Aotearoa New Zealand is structured to uphold pre-existing clinical power and resource hierarchies (Came et al., 2020; Health and Disability System Review, 2020; Middleton et al., 2018; Waitangi Tribunal, 2019). By bridging health research and systems change methodologies, Whakauae Research is gaining insight into the systemic roots of complex problems and gaining a useful instrument for making the necessary improvements to Māori health and wellbeing.

Historically, Indigenous peoples living in colonised environments have been disproportionately underrepresented in the design and development of the

systems which govern them (Ray et al., 2022; Schaefer et al., 2021), and have been unable to apply Indigenous knowledge to bring about much-needed change for Indigenous peoples. The growing evidence from within Indigenous research continues to highlight Indigenous solutions to Indigenous peoples' problems, including an understanding of systems change. As Māori health researchers we (the authors, descendants of Ngāti Hauiti, Te Ati Haunui-a-Pāpārangi, Mōkai Pātea Nui Tonu, Te Ati Awa, Ngāti Ranginui, Ngāi te Rangi, me Ngāti Pukenga) are interested in the alignment between systems change methodologies and our own Indigenous epistemologies; an alignment borne out of shared understanding of how systems are created and maintained. The understanding we gained becoming familiar with systems change thinking and writing provided us with the opportunity to consider in our own work how we can influence our national health system, and support efforts to improve the wellbeing of Indigenous peoples.

Systems Change and Indigenous Health

Systems thinking is a methodological framework for applied research that provides methods for dealing with complexity and for developing one's own abilities to improve transformative procedures (Hernández et al., 2017). The Six Conditions of Systems Change explained by Kania et al. (2018) outline explicit, semi-explicit, and implicit agents that interrelate to keep 'problems' in place. The explicit, meaning most obvious agents, are Policies, Practices, and Resource Flows; the semi explicit conditions include Relationships, Connections, and Power Dynamics. The implicit, least 'obvious' condition is represented by Mental Models, which are the often-unexamined beliefs and assumptions that influence behaviour (Kania et al., 2018). Effecting substantive and enduring transformative change relies on being able to know and change the implicit condition of mindsets. By incorporating a broader view of the interdependent elements, networks of relationships, and patterns of interaction that shape and impact health, systems thinking can facilitate a shift from a seemingly narrow focus on health-outcomes to seeing the entirety of the system in which the wellbeing of Indigenous populations is embedded (Hernández et al., 2017). The conceptual tools provided by a systems thinking methodology enable us to interrogate health systems via the lens of continuous histories of settler colonialism, which underpin factors of vulnerability, hazards, and poor health outcomes (Ray et al., 2022). Many of the challenges Indigenous peoples face today are not isolated concerns but rather have their origins in the structure and design of health systems. Systems thinking can help researchers, policy makers, and actors in positions of power within the national health systems "flip" their thinking. Instead of addressing how Indigenous peoples might adapt to and navigate the existing health environment which underserves Indigenous peoples, the flipped focus is directed at how health institutions can alter colonial practices and structures to accommodate Indigenous needs (Ray et al., 2022).

Indigenous Worldviews and Systems Change Thinking—Working in Complexity

“The world is a complex, interconnected, finite, ecological—social—psychological—economic system. We treat it as if it were not, as if it were divisible, separable, simple, and infinite. Our persistent, intractable global problems arise directly from this mismatch”
(Meadows, 1982, p. 101).

Making changes to systems in a Western world is difficult for Indigenous people because the systems we are trying to change are monolithic, complex, deeply entrenched, and we are often not in the positions of power to dismantle them in any real and meaningful way. While we assert that the core principles of systems change and Indigenous epistemology are compatible, the Western-based conceptualisation and application of systems change methodology mean that, as a methodology, systems change is still being applied, conceptualised, and shaped by Western worldviews. Indigenous cultures have long-held perspectives that place an emphasis on the interdependence of all living things and our environment as an entire inter-dependent entity (Nelson, 2008). The systems change approach, which takes into account the interconnected nature of the world's economic, social, and ecological systems, finds common ground with this inclusive holistic world view. Instead of focusing on individual components, both viewpoints stress the need to recognise and resolve the web of interdependencies that underlies the whole. Systems thinking and Māori knowledge share an emphasis on relationships and the meanings assigned to these interactions (Heke et al., 2019). Systems thinking, which places a focus on symmetry and emergence within complex webs of interaction (Stowell et al., 2014), is much closer to the perspectives of Māori knowledge, which links all things together, anchored by a holistic, relational, and temporal worldview (Heke et al., 2019).

Systems change theory takes a wide lens to systemic issues, concentrating on deep complicated roots or complexity. Similarly, Māori view the world as an interconnected tapestry, where nothing occurs in isolation, but instead is informed by relation to other phenomenon. Kaupapa Māori philosophy, which places a focus on holism and the interconnectedness of all things, is congruent with a systemic approach, which is necessary for seeing the “big picture” (Oetzel et al., 2017). Our worldview includes not only the interconnected ecological, social, psychological, or economic, but also the philosophical and spiritual, and the connection between the Atua (deities) and humanity, all encapsulated in mātauranga Māori—Māori knowledge (Boulton et al., 2021a; Marsden, 2003).

Indigenous perspectives frequently place priority on the prosperity of local communities and the strength of relationships. Likewise, the necessity of community collaboration in systems change to tackle complex difficulties is also acknowledged. Both Indigenous perspectives and systems change recognise the value of listening to and learning from locals, those who are the experts in their environments. Involvement in decision-making processes is critical, however,

beyond *involvement* we advocate for Indigenous *leadership* in all spaces. Robust relationships between individuals are essential in order for society to work, and *whānaungatanga* (relationship building) demands conscious efforts to establish and form enduring relationships among and between communities (Boulton & Brannelly, 2015; Mead, 2016; Smith, 2021). For Māori, their long history as *kaitiaki*, or guardians, of the islands of Aotearoa New Zealand and their intimate familiarity with their natural surroundings, including the seen and unseen, make them indispensable to the success of any initiative to effect meaningful transformation of systems (Mark et al., 2022). The idea of centralising Māori knowledge within systems change thus needs to come from the place where we use our Indigenous knowing to position and adapt systems change. Moreover, the cultural signifiers that come from local knowledge, *whānau*, *marae*, *hapū*, *Iwi* and *kaitiaki hāpori* (communities) build opportunities to represent systems change via our own cultural metaphors (Morgan et al., 2021; Yunkaporta & Shillingsworth, 2020).

The Liminal Space and Models of Indigenous Systems Change

“Relational systems thinking is about reasoning between multiple ways of knowing. It’s not about choosing sides—systems theory and complexity science on one side; Indigenous knowledge systems on the other. It’s about the space in-between, and dancing with these two ideas until a third presence shows up.” (Goodchild, 2022b, p. 13)

When looking at the theory of systems change, as developed and applied within a Western lens, there is also an *in-between* zone, a space where linear and binary thinking is abandoned in favour of a *liminal* space of newly seeded growth. This space is a convergence of the points of contact between various bodies of knowledge systems, languages, concepts, and emotions. These various bodies become entangled with one another, producing the liminal zone where more than one worldview can exist. These liminal spaces have been theorised within Indigenous paradigms by Indigenous scholars, including the two-row Wampum belt (Eastman, 2010; Goodchild, 2022a), split headedness (Cajete, 2001), He awa whiria—A “Braided River” (Macfarlane, 2012), and “Two-eyed seeing” (Braithwaite, 2018). Systems change and a Māori worldview can be compared to “Two-Eyed Seeing,” which emphasises the value of combining strengths of Indigenous and Western worldviews to hold a more holistic perspective on the planet and its inhabitants (Bartlett et al., 2012). The Māori worldview highlights the liminal region where Indigenous systems transformation has happened ‘organically,’ and, within the last few years, where systems change theory has been intentionally adapted, re-written and applied by scholars, communities, and practitioners alike.

“Indigenous peoples worldwide have been using sophisticated approaches that have great synergy with systems thinking for millennia” (Browne et al., 2021, p. 6); examples of this include the Michigan Community Anishinaabe and Rural Energy Sovereignty (MICARES) Medicine Wheel framework (Mallett, 2018), which responds to the ethical challenges of how Indigenous knowledge is valued and how communities are included in designing the solutions to socio-technological social systems. The MICARES Medicine Wheel framework allows communities, researchers, and practitioners to use Indigenous knowledge systems to conduct community-based and inclusive enquiries that influence transitions based on community knowledge, experience, values, and aspirations, thereby acknowledging the systemic nature of *problem solving*. The above mentioned Two-Row Wampum Belt, or Tekani teyothata'tye kaswenta (properly), is one of the most well-known examples of Haudenosaunee two-column thinking in action (Goodchild, 2022a), which explores how two knowledge systems (Western and Indigenous) can exist alongside each other. Here, changing social systems through increased self-awareness entails probing the inner workings of phenomena, so that we may perceive, feel, be present with, and ultimately alter them.

In Australia, the Circle Work-Process is being used at the Indigenous Knowledge Systems Lab (IKSL) to centre Indigenous philosophy and custodial governance from “60,000 years of continuous cultural knowledge” (Davis & Coopes, 2022, p. 85). Exploration, inquiry, and organisation are grounded in the circular flow of energy and knowledge, as wicked problems are systemically explored through “deep-time storytelling, yarning, and narrative capture” (Davis & Coopes, 2022, p. 86). Another example of systems change thinking from Aotearoa New Zealand is the deliberate adaptation of the Six Conditions of Systems Change (Kania et al., 2018) into a *mātauranga Māori* (Māori knowledge) informed model, Te Niho Taniwha. Led by Healthy Families NZ (a Ministry of Health prevention initiative) who support already-existing, local action on health and who influence local and national health financing and policies to be more responsive to communities and their different settings (Matheson et al., 2022), Te Niho Taniwha encapsulates a community-wide systems approach. The development of the Niho Taniwha model is an example of adapting the kupu (words) of the Six Conditions of Systems Change (Inspiring Communities, 2022) into concepts and notions which resonate with Māori, representing a strategic shift away from fragmented, small-scale, and time-limited impact activities (Rayne et al., 2023). This Indigenous adaptation to the Six Conditions model is an act of *hybridity*, in that it negotiates between the Western meanings of the model and the Māori understanding of particular kupu (words) and their application. The idea of the liminal space, or, using Bhabha’s construct of the *third space*, means that this adaptation represents the space where translation and negotiation of Indigenous and Western thinking can occur (Bhabha et al., 1996).

Transformational Māori Health Research, Innovation and Systems Change

Another example of the indigenisation of systems change can be found in the research practices of Whakauae Research. The ongoing health and wellbeing inequities experienced by Māori mirror the situation of colonised Indigenous peoples across the globe, and, like our Indigenous counterparts in other nations, the search for answers to the complexity of inequity has been pursued by Māori scholars, tribal leaders, and community for a number of years. Māori have strategically and purposefully utilised ‘research’ to not only measure and articulate the myriad of problems experienced by Māori since colonisation, but more significantly, to devise solutions and highlight the aspirations of Māori communities.

Whakauae Research is committed to the vision of “transforming Māori lives through excellent research” with a mission to drive “high-quality kaupapa Māori research that is innovative, collaborative and cutting edge to create positive change” (Whakauae Research, 2018). Working closely with the Iwi of Ngāti Hauiti has meant the development of a bespoke *kaupapa Māori* research approach. Kaupapa Māori can be defined as a philosophical doctrine, which incorporates and centralises the knowledge, skills, attitudes, and values of Māori society. This type of research places Māori communities and worldviews firmly at the core of activity and provides a platform for Māori voices to be presented and acknowledged. For Whakauae, kaupapa Māori practice grounds and signposts inquiry into the persistence of Māori inequities, which is highlighted in our work across health services (e.g., Cormack et al., 2022); the Covid-19 pandemic (e.g., Boulton et al., 2022); Rongoa Māori (traditional Māori healing systems) (e.g., Mark et al., 2022); and the ongoing displacement of Māori from their home spaces (e.g. Boulton et al., 2021a, 2021b). Kaupapa Māori also includes Whakauae’s ethical duty of kaitiakitanga (stewardship) of research data, which means safeguarding and ensuring that the benefits that arise as consequence of our research are directed at those for whom the project was originally conceived: whānau, hapū, Iwi and Māori communities more widely (Boulton et al., 2014). To achieve this, Whakauae has created its own data policy which includes the principles of Māori Data Sovereignty (the inherent rights and interests that Māori have in relation to the collection, ownership, and application of Māori data) and Māori Data Governance (principles, structures, accountability mechanisms, legal instruments, and policies through which Māori exercise control over Māori data) (Whakauae Research, 2021).

The more recent and much-needed effort of New Zealand health research funders and the New Zealand Government to produce impact-focused research (Health Research Council of New Zealand, 2019; Ministry of Business, Innovation and Employment and Ministry of Health, 2017) has further highlighted the vexed issue of linking causality of improvements in health outcome with single initiatives, devoid of context. For Māori, this is further complicated by the history of Western research approaches that had relegated

Māori as the *other* to be studied, and where research has the potential to function as a mechanism to exploit and harm Māori (Boulton, 2020). Moreover, Māori are not a homogeneous population in terms of their social, economic, and cultural situation, nor are they of a single mind in respect to their aspirations related to things Māori (Smith, 1995). The colonial legacy of grouping together a wide and diverse group of tribes, each with their own distinct histories, customs, and knowledges, into one amorphous ethnic grouping of *Māori* has been pervasive in approaches to research in Aotearoa New Zealand. This *one-size-fits-all* approach ignores the underlying complexities of systems in response to lived experiences.

Whakauae Research has had to proactively design research practices that respond to the needs of tribal communities, and which contribute to positive change within such communities. The idea of research as a tool towards decolonisation has connected the approach of kaupapa Māori research to systems change theory, in that both focus on analysing issues and designing solutions with a holistic overview of interrelatedness and complexity. This recognition has prompted Whakauae to adopt systems change theory as an underlying methodological tenet of our research, recognising that to positively change the lives of Māori, the system that keeps perpetuating inequity needs to be investigated, laid bare, and then challenged from within an Indigenous worldview—a Māori worldview. The development of the Whakauae systems change framework rests on deeply embedded tribal values of Ngāti Hauiti, the lived experiences of the Māori community, and the impact of New Zealand's colonial history.

Whakauae's Systems Change Framework

The idea of researchers as “*knowledge brokers*” engaged in evidence mediation (Meyer, 2010) is a central idea within Whakauae Research's alignment to systems change. Knowledge brokers are at the centre of a science advisory ecosystem (Gluckman, 2017) which is made up of institutions and players from the world of research, rather than policy, who improve the incorporation of scientifically developed knowledge into public policy. In this sense, we, as Māori researchers, need to be as clear as possible about the macro, meso, and micro ecosystems that surrounds us, and our efforts to push research out into the world to make change on the ground for Māori. The idea of exploring and bringing these ecosystems into the light is not new for Māori thinkers. In this sense we follow the footsteps of the leaders who have come before us, who have been able to break down what seems to be *complex* into relatable and useable frameworks based firmly in Te Ao Māori (the Māori world). One of these examples is Sir Mason Durie's *Whare Tapa Wha* (House of four walls), which encapsulated a Māori view of holistic health in a simple health model to show the components of taha wairua/spiritual wellbeing, taha hinengaro/mental and emotional wellbeing, taha tinana/physical wellbeing, and taha whānau/family and social wellbeing. The Whare Tapa Wha, has, since its first scholarly description in 1984, become widely known and used within the Aotearoa New Zealand health system as a

means of articulating a Māori view of health to a largely Western health system (Durie, 2003). Another example is Te Korekoreka (Tokona Te Raki, 2023), a conceptual framework devised by Kai Tahu (an Iwi in the South Island of New Zealand) which utilises their unique Iwi Indigenous systems to guide Māori futures, emphasising the need for diverse viewpoints in evaluating complex changes. Drawn from a Kāi Tahu karakia (incantation) *Kei a te pō*, which narrates the Kāi Tahu creation story, outlining the emergence of the universe through song, Te Korekoreka delves into four pivotal realms of creation: commencing with Te Pō (the darkness), transitioning to Te Ao Mārama (the light), advancing to Te Ao Tūroa (the physical world), and eventually returning to Te Kore (the nothingness), completing the cycle by returning to Te Pō (Tokona Te Raki, 2023). The four domains of Te Korekoreka utilise ancient creation knowledge to address the myriad complex contemporary challenges whānau face today.

Te Ao Māori (the Māori world) provides a distinctive perspective for understanding and interacting with systems, underscoring interconnectivity, reciprocity, and balance. This viewpoint promotes a deeper comprehension of the complex interactions among different components and demonstrates an innate comprehension of constructing, interpreting, and navigating systems. Te Ruru is a framework which aims to support an ongoing process of Indigenous thinking and knowledge, demonstrating Indigenous ability to translate complex concepts into practical and tangible models.

The following systems change framework, Te Ruru, has thus been purposefully adapted and iterated by us as a way to represent and to remind ourselves not just of the visible system(s) within which we, and our Māori communities, inhabit, but also the *unseen* within our Indigenous and colonial histories.

Systems Change Framework: Te Ruru

To express the significance of systems change from an Indigenous lens particular to our rohe (region) in Aotearoa New Zealand, we draw upon the metaphorical symbolism of Te Ruru (the owl, the Morepork, in English, a small owl, endemic to Aotearoa), a bird of historical significance to Ngāti Hauiti. The Ruru has played a crucial role in the formation and growth of some of Ngāti Hauiti's cultural artefacts, providing inspiration for the melodies, rhythms, and diction of waiata (songs), whakataukī (proverbs) and karanga (ceremonial calls). A carved representation of Te Ruru holds pride of place visually in the tomokanga (carved entrance way) to Rātā Marae (traditional meeting place), greeting every manuhiri (visitor) into the ancestral house. Te Ruru plays a critical role in environmental sustainability, given its fluid and interconnected relationship with other species in te taiao (the natural environment) of the Rangitīkei area, navigating bushlands, forest, waterways and the night. Te Ruru is thereby in itself a connector between land, species, and tangata (people), and like other birds native to Aotearoa New Zealand, it is a taonga (treasured species) and an indicator of cultural meaning, health, and the vitality of the natural environment.



Image 1: Te Ruru Systems Change Framework

We are intentionally adopting a systems change framework to critically assess, create, and coordinate system-wide equity and inclusion initiatives in our Kaupapa Māori research. A systems change framework in itself may not be a novel idea, but when operating within our Ngāti Hauiti worldview proves a useful framework for assessing the cross-hierarchical, systemic challenges faced by Māori in seeking wellbeing. With the use of a systems change framework, we can pinpoint the specific factors that are preventing our Kaupapa Māori research from being implemented and having an impact.

The systems change diagram is complex, so we have broken it into three parts for ease of understanding.

Part One—A Micro Lens on Systems Change

The first part of the diagram privileges and reinforces our Indigenous identities, starting from our worldview, based on our values, our actions and led by the concerns and needs of our whānau (extended family or community group). A micro lens highlights the eyes, beak, and the body of Te Ruru, providing a close-up look at the activities a research team might undertake within a study.

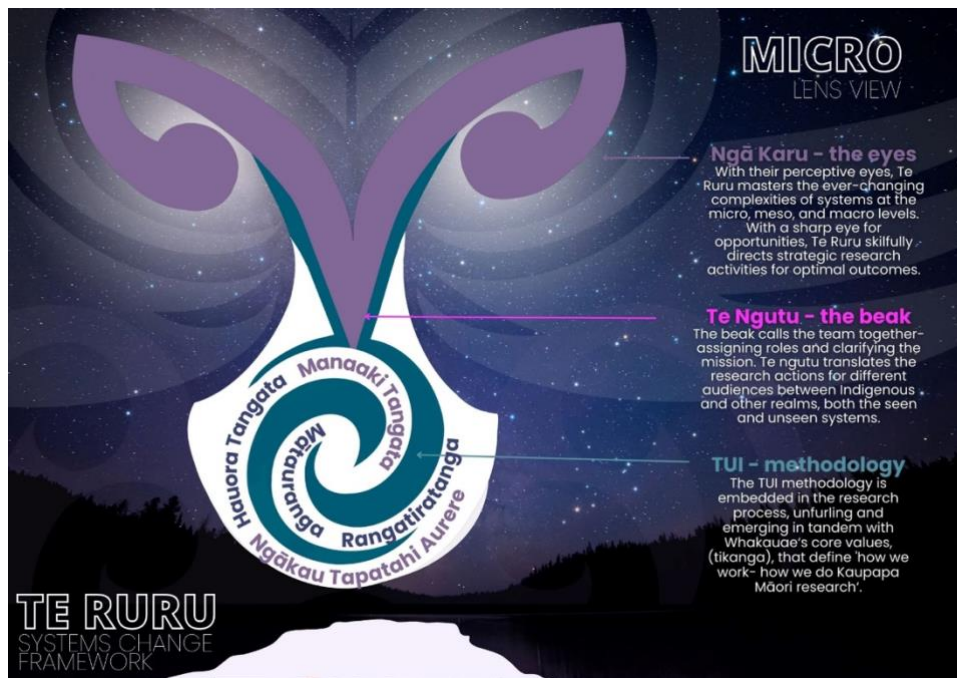


Image 2: Part One of Te Ruru Framework

Ngā karu - The Eyes: The eyes represent the lens looking out from our Indigenous life world. The morepork has sharp eyesight and hearing. A model of efficiency, Te Ruru hunts at night, taking a whole of systems view to what is happening on the land below. With their perceptive eyes, Te Ruru masters the ever-changing complexities of systems at the micro, meso, and macro levels. With a sharp eye for opportunities, Te Ruru skilfully directs strategic research activities for optimal outcomes.

Te Ngutu - The Beak: Whilst our values are constant, the ways in which we engage with the metaphysical and material worlds change as the knowledge, or research gathered, is translated. This is represented by the beak of Te Ruru who calls “po, po, keo, keo.”¹ The beak calls the team together—assigning roles and clarifying the mission, Te ngutu translates the research actions for different audiences between Indigenous and other realms. As a messenger between realms, Te Ruru engages with the visible and invisible energies (environment, humans, spiritual, ancestral), both the *seen and unseen systems* and with its spiritual significance as a connector to the human and more-than-human realms Te Ruru holds the power to protect, to warn, and advise. The beak of Te Ruru

¹ “Po, po, keo, keo” is the call the Ruru or Morepork makes at night. This wording comes from a Ngāti Hauiti karapīpiti, from a phrase used in formal contexts (like a Pōwhiri- a welcoming ceremony). Many karapīpiti include Iwi-specific genealogical knowledge, local expressions that are meaningfully relevant, tales, and expressions about ancestors' thoughts, acts, and historical events (U [Potaka](#), personal communication, Jan 2023)

represents the translation of our research findings—the myriad transformations and paths that messages must follow, as well as the varying shapes they must take, in order to inspire a groundswell of action and mobilise our stakeholders and partners to join us in effecting change.

TUI Methodology: At the core of Te Ruru are the tikanga (values) of Whakauae (our Iwi owned research organisation), seen here as the spiral at the centre of Te Ruru, firmly fixed in the depths of tangible research practice and spirituality of Whakauae team members. An ancestor from Ngāti Hauiti, Tamatea Pōkai Whenua, named a local mountain range "Whakauae Raro" (in the Rangitīkei Ranges), which is reflected in our Research Centre's name (Boulton, 2020). In the systems change diagram, the values of Whakauae represent how we are led in our Kaupapa Māori research through the enduring foundation of our kawa (core values), which were bestowed upon us by Ngāti Hauiti, rooted deeply in Papatūānuku (our earth mother). These values form around the body of the TUI Methodology (Allport, Johnson & Bennett-Huxtable, 2023) which unfurls and emerges alongside the research ensuring the consistency of our worldview and our values in how we engage with our whānau.

Part Two—A Meso Lens on Systems Change



Image 3: Part Two of Te Ruru Framework

New mātauranga (new Māori knowledge): In tune with our environments, we are able to orient our aspirations and new narratives within the stars and expand our new mātauranga optimistically outwards. For new mātauranga to take root and flourish, the system needs deliberate calibration to affect meaningful and sustainable change. The calibration intends to change the

status quo by modifying the structure or function of a specific system through deliberate interventions. By modifying the fundamental components and enabling processes that cause the system to function in a specific manner, systems change seeks to achieve long-term transformation. For new mātauranga to flourish, part of this process involves looking back inwards the micro and meso worlds where often overlooked and neglected trauma and healing is required, a process we coin *haumanutanga* (restoration).

Ngāngara (the things that hold us back): Te Ruru is a nocturnal hunter, and their prey includes insects, small animals, and birds—including introduced (non-native) species. In fact, Te Ruru is one of the few native species which has adapted well to the introduction of species (mice, stoats) which it preys on, cleaning the forest floor of these introduced pests. For this reason, the *ngāngara* in its claws symbolise the trauma, barriers, and doubts that prevent us from truly flourishing. Depicted here as taniwha (spirit) or ngāngara (dragons/insects), this imagery reminds us that there are internal, personal, battles that, as colonised peoples, we must contend with and overcome—victimhood, self-sabotage, trauma, jealousy, frustration. Born from colonial trauma (disconnection from land, language, culture, family) and survival tactics, this third section is often the *unseen* or as yet unspoken step in systems change. Even with the system stakeholders' help, additional support and space in the process is required for Māori to remedy habits, patterns, and behaviours which constrict long term change to flourish. While we rebuild, reshape, and coordinate systems change, concurrently we must heal, take space, and restore hauora (wellbeing) in this wider realm to ensure the changing systems can be sustained and Māori are resourced with the capacities and capabilities required to lead that change.

Part Three—A Macro Lens on Systems Change

New mātauranga (new Māori knowledge): In tune with our environments, we are able to orient our aspirations and new narratives within the stars and expand our new mātauranga optimistically outwards. For new mātauranga to take root and flourish, the system needs deliberate calibration to effect meaningful and sustainable change. The calibration intends to change the status quo by modifying the structure or function of a specific system through deliberate interventions. By modifying the fundamental components and enabling processes that cause the system to function in a specific manner, systems change seeks to achieve long-term transformation. For new mātauranga to flourish, part of this process involves looking back inwards the micro and meso worlds where often overlooked and neglected trauma and healing is required, a process we coin 'haumanutanga' (restoration).

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Image 4: Part three of Te Ruru Framework

TUI (Translation, Uptake, and Impact) as a Tool and Method of Systems Change

While charting an alignment between systems change and Māori research is one thing, being able to operationalise systems change thinking throughout the entirety of a research process is quite another. We know that when it comes to the reach and subsequent impact of research outputs, effecting change can be fraught. Educational researchers Henriksen & Mishra (2019) reported that “as many as 50% of papers are not read by anyone other than the authors, referees,

and journal editors of a piece” (p. 395).² The *traditional* way of sharing research in academic papers, conferences, and other places for *experts* or academics, excludes a wide range of stakeholders—including communities—and often does not propel new insights to influence changes in policy and practice. The fact that academic papers alone do not result in meaningful change is acknowledged by the World Health Organisation (WHO), who describe the need for an evidence ecosystem for impact, which consists of the use of systematic and transparent processes, continuous improvement processes, needs-based approaches, inclusiveness, integration, and equity within research dissemination (World Health Organisation, 2021).

For Whakauae Research, where the gap between research and positive impacts for Māori remains a substantive concern (Smith et al., 2019), our purpose-designed TUI approach has become a way of enacting systems change thinking across the life cycle of a research project. In this sense, Te Ruru is our guiding systems change methodology, and TUI is one of our tools, or methods to enacting the systems change method. TUI stands for *translation, uptake, and impact*, which Whakauae has defined as three essential aspects that guide the research process towards systems change. *Translation* represents the interpretation of key insights into communications that are easily understood by the intended key audience—in our case, Māori. The term "translation" is especially fitting for our research facility, which is owned by Iwi, because our goal is to transform academic content into a form that can be understood and used by Iwi for their strategic growth, Māori, community members, and decision-makers. We cannot expect our conclusions to be understood or, more crucially, put into action, by using a one-size-fits-all strategy. *Uptake* refers to key insights resulting in changes to how something (e.g., health services) is designed or delivered. Lastly, *impact* is defined as the result of changes that occur in response to either uptake, or the mindset shifts initiated by key insights and research messaging. Whakauae uses TUI as part of its continuous effort to find effective strategies for disseminating research results to targeted audiences. We seek to effectively apply the findings from our research into forceful and actionable intelligence to make a positive impact on the lives of Māori.

The act of translating evidence into messaging that is relevant to Māori communities creates space for inclusive change. Translation in this sense means changing the story, changing who tells the story, and changing who hears the story. This act of *translation* thereby has the potential to create uptake of research findings, and to result in impacts from the change created by the uptake (Allport, Johnson & Bennet-Huxtable, 2023). Changing how we create narratives

² This number is based on Meho’s (2007) analysis of the Institute for Scientific Information (ISI) citation databases – which include the Arts and Humanities Citation Index (A&HCI), Science Citation Index (SCI) and Social Sciences Citation Index (SSCI).

from research can help drive public discourse, help shift mindsets, and ultimately affect policies and practices.

Our ability as researchers to influence and impact the top-layer of the “Six Conditions of Systems Change”, namely the analysis of policies, practices and resource flows is considerably more straightforward than our efforts to alter the second and third layer of this framework, i.e., relationships and power dynamics and mindsets. The intentional translation component of the TUI approach creates the opportunity to present new and multiple perspectives; through Whakauae’s TUI approach diverse perspectives and roles are brought together to make sense of new findings, rather than interpreting Māori experiences through a Western lens.

TUI is an aspiration as well as a process, where Whakauae research teams are required to strategically consider the breadth of the system that provides the context for any research topic, population of interest, or locality. The practice of TUI requires the research team to consider the role of mindsets within systems change, prompting the exploration of the research teams’ mindsets, the research participants’ mindsets, and the mindsets of the stakeholders that can help to effect change. The TUI process—applied through a series of workshops, run at key stages throughout the research project—prompts researchers to consider the wider systemic aspirations for each research project from the very outset of the study. Teams are also prompted to consider the key stakeholders, and the stakeholders’ mindsets, to better design and target communications of research findings that reflect this larger systemic thinking. Outputs from this process have resulted in a range of targeted disseminations, including Indigenous symposia, videos, infographics, websites, blog posts, Pūrākau (story) books, media articles and games for rangatahi (young people), alongside the more common academic outputs of journal articles and conference presentations.³

The example of TUI as an operational tool of systems change in research is founded on Māori relational understanding, which is based on the constant interplay between connectivity and power dynamics. The idea of relationships and power as an integral aspect of systems change is well-known to Māori, who have over a century of experience of living in Western colonial relationships and power dynamics not of their own making. Disruption of these dynamics comes from the intentional re-storying of narratives *about us* and our centring of Māori and Māori lives as an act of mana motuhake (self-determination and control over our own destiny).

³ See www.whakauae.co.nz

Case Study Te Ruru Systems Change Framework from Using the TUI Methodology

Te Ao Rauropi research team at Whakauae used the TUI methodology and Te Ruru framework to launch a study promoting the understanding and adoption of Rongoā Māori (traditional Māori healing) in the New Zealand health and disability sector. This case study showcases Te Ruru being used in action, where the Te Ao Rauropi research team established a functional liminal space inside the complex and predominantly Western-focused health system for systems level transformation to occur. This case study follows the Te Ruru framework above and is broken into three sections (micro, meso, macro) for ease of reading.

A Micro Perspective

The TUI methodology began at the start of the research project which allowed the research team to develop their systems impact thinking within the central tikanga (values) that Whakauae operates within. The TUI methodology provided the research team oversight and instructions on how to conceptualise and navigate between micro, meso, and macro levels of the health systems with a bird's-eye view, breaking down system problems into underlying patterns and attributes, revealing the factors holding these issues in place (Allport, Johnson & Bennett-Huxtable, 2023). From this process, the Te Ao Rauropi research team pinpointed a specific area inside this transitional liminal space where Western and mātauranga Māori viewpoints could engage with each other. This liminal space was a TUI dissemination opportunity—an online Indigenous symposium. Western medical viewpoints on Rongoā Māori were invited into an Indigenous led space (instead of the other way around), where Whakauae-informed tikanga (including a pōwhiri (welcoming ceremony), karakia (ritual incantations and chants invoked to spiritually protect and acknowledge human and more than human energies) and paepae (a metaphorical bench of speakers)) were led by kaumatua (respected elders) to open, close and keep the online symposium safe. In line with the values of Whakauae, the symposium was kept spiritually safe by enacting tikanga, and this included ensuring that the symposium was freely accessible to whānau with a diverse range of inter-generational attendance occurring (Allport et al., 2022).

A Meso Perspective

Identifying an Indigenous online symposium as a potent transformational platform, TUI workshops guided the Te Ao Rauropi research team to enact the wings of Te Ruru by calling on key stakeholders within organisations (such as the Ministry of Health, Accident Compensation Corporation, the interim Māori Health Authority and the Rongoā community), forming collaborative relationships to influence a shift in the resourcing of Rongoā Māori in the public health and disability sector. This process relied heavily upon the long standing, credible relationships the Te Ao Rauropi research team had built with systems

stakeholders and the quality of the research dissemination the team had achieved. The resulting symposium *Tū Mai Rongoā Māori* brought together a diverse group of stakeholders, possessing resources and influence to impact policy, practice, and power dynamics in the health system alongside whānau community members who needed this shift to occur. Tū Mai Rongoā Māori showcased the transformative potential of Rongoā Māori to stakeholders, aligning strategically with a significant period of health sector restructuring (Allport, Johnson, Potaka-Osborne et al., 2023). A key focus of the symposium was to clarify narratives; to debunk the myth that Rongoā Māori is only concerned with therapies such as massage or the application of creams and instead is a holistic mode of maintaining and sustaining wellbeing (Mark et al., 2019). The symposium involved drilling down through various system levels, including mindsets and mental modes, to clarify the definition of Rongoā Māori and capture the depth and breadth of its application. Symposium insights were disseminated through various channels, including infographic posters, a dedicated website, and youth-specific resources. The creation of these resources ensured greater accessibility of Rongoā Māori knowledge by the community, which could in turn be used by communities to aid advocacy efforts and support applications for funding. Whānau participants of the symposium confirmed that they felt heard and that it was a healing experience (Allport et al., 2022). Proactively seizing opportunities as they arose, Te Ao Rauropi contributes to movement building in Rongoā Māori, advocating and influencing systemic change in how healing can occur in Aotearoa. An example of seizing opportunities occurred only months after the symposium ended where bespoke posters, outlining government policies and practices, were displayed in a tent on Waitangi Day. Waitangi Day is a significant public holiday in Aotearoa, New Zealand (Matika et al., 2021) which draws Members of Parliament, systems stakeholders, government department heads and those with the power to effect change to policies and practices to an event which acknowledges the signing of Te Tiriti o Waitangi (the Treaty of Waitangi). Drawing on the resources developed from the symposium, Te Ao Rauropi team members advocated for the inclusion of Rongoā Māori into practice by getting eyes onto the work, i.e. disseminating project findings to reach an audience that is often very hard to reach or not receptive to these messages. The context of Waitangi ramps up an awareness of Māori health equity and other Māori equity concerns which meant we were able to reinforce the importance of Rongoā Māori.

A Macro Perspective

Te Ruru, as a conceptual systems change framework, facilitated a nuanced reflection of the Te Ao Rauropi research team's impact, merging the planned and organic activities connected with their research outputs. Notably, Maikuku (the claws) empowered Te Ao Rauropi to proactively seize key opportunities as they arose, a distinctive feature distinguishing the Te Ruru approach from traditional funded research projects.

Moreover, contemplating the presence of *ngangara* within the system pinpointed particular detrimental behaviours (such as gatekeeping) and obstacles hindering the acceptance of *Rongoā Māori*. These are the factors impeding the emergence of fresh *mātauranga* (knowledge) and inhibiting transformative changes within the health system. Te Ruru then, is a framework which supports emergent thinking. It is responsive to opportunities and gives researchers permission to be dynamic and transcend the traditional role of what is considered “academic.” Te Ruru encourages research to return back to the community and promotes the use of *tikanga* and *kawa* within the setting in which it is used by prioritising an Indigenous way of doing things first before bringing Western or other theory into the liminal space. The new *mātauranga* the Te Ao Rauropi team developed is evident in the myriad bespoke outputs they have produced, tailored to speak directly to the many system stakeholders who can enact change. In contrast to conventional research projects concluding with the expiration of funding, Te Ao Rauropi is committed to sustained resource sharing, offering a specialized website accessible to all beyond the project's conclusion. The Te Ao Rauropi team's ongoing efforts involve disseminating knowledge and actively contributing to the advancement of *Rongoā Māori* adoption. As the Te Ao Rauropi research team continues to develop their research and outputs, the Te Ruru framework is being used to evaluate, measure, and communicate the achieved system shifts. As a growing model, the Te Ruru framework can adapt and expand alongside the team's progress.

Whakauae's systems change framework, operationalised by the TUI process, thereby enables the ‘theory’ of systems change and in particular the ‘theory’ of a bespoke, Indigenous systems change framework to be explored as part of the everyday business of Māori health research. Here, the importance of how our audience receives, interprets, and mobilises our research is as important as the research findings themselves.

Concluding Thoughts

There needs to be more research and dissemination investigating the steps Indigenous people take to affect meaningful (and intergenerational) change by utilising Indigenous systems change frameworks. Furthermore, we need to understand the optimum conditions under which these steps can be both meaningfully implemented and replicated. Indigenous academics, researchers, and social innovators in Aotearoa New Zealand and globally are beginning to embrace the promise of systems change thinking and practice by incorporating Indigenous knowledge into their own way of doing things. Although they are distinct knowledge systems, each with its own rich cultural and historical background, we recognise that systems thinking and an Indigenous Māori worldview overlap in shared understandings and experiences which complement and strengthen one another (Heke et al., 2019). Beyond this overlap, there is significant congruence and compatibility with our Māori and tribal worldviews and epistemologies, allowing us at Whakauae Research to indigenise an existing

systems change framework and operationalise it in a cultural-ethical way through the TUI process.

The important distinction that needs to be made here is that for Māori, systems change is a tool which can be used inside an Indigenous paradigm, and not the other way around. The systems change frameworks arising from Indigenous knowledge systems are inextricable from the specific Indigenous context from which they arise, and should not be appropriated into colonial endeavours, or by those outside of the Indigenous context. Whilst the systems change framework and Māori worldview can be aligned for impact, we stress that this compatibility does not need to involve erasing Indigenous worldviews or forcing them to conform to Western ones. Combining systems change thinking within and inside of Indigenous worldviews is seen here as an opportunity to continue the quest for improved equity and to rectify the experience of colonisation, dispossession, and marginalisation of Indigenous peoples. This creates a counter-hegemonic space, where power relationships can be analysed and articulated. It is here, at the interface between Indigenous and Western conceptualisation, that we see an opportunity for the liminal space to go beyond reductionist, compartmentalised and monocultural strategies to solve complex problems.

Systems change, as an approach to thinking about complex issues when aligned to, or conceptualised through an Indigenous worldview, can contribute to the self-determination, cultural revival, and recovery of Indigenous peoples. Using systems change from an intentional Indigenous paradigm is thereby an act of decolonisation—a direct act against the opposing oppressive structures or systems currently blocking Indigenous flourishing. Te Ruru's transformational power lies in its critical reflection of the Aotearoa New Zealand health care system, bringing to the surface the seen and unseen, and thereby supporting Māori to take the helm to lead systemic change via the Indigenous translation of inclusive health research.

Te Ruru demonstrates how an Iwi-owned organisation has developed a practical plan for implementing systems change based on an Iwi-specific set of epistemological and ontological perspectives. Te Ruru, rather than being a static model, is a living Indigenous-centred framework that evolves and improves with each application, refining the application of researchers' work within diverse cultural systems. We share our example in the hope it is a call to other Indigenous researchers who might hear the symbolic "po po, keo, keo" from their own owls, and contribute to the broader discourse on Indigenous knowledge informed approaches to systems change.

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Glossary

The Glossary included here is intended to provide non-native Te Reo Māori speakers a brief explanation of the concepts mentioned in the article.

Te Reo Māori	English
Te Ao Rauropi	Literally, the biosphere. A research project being conducted by Whakauae Research Services Ltd. The full title of the study is Te Ao Rauropi: Mapping the biosphere of Rongoā Māori. For more information see https://www.whakauae.co.nz/current-work/te-ao-rauropi-mapping-the-biosphere-of-rongoa-maori and https://www.whakauae.co.nz/current-work/te-ao-rauropi-mapping-the-biosphere-of-rongoa-maori-2
Whakauae	Whakauae Research Services Ltd in the North Island of New Zealand is the country's only Iwi owned research centre. The term Whakauae comes from the phrase "Te Whakauae a Tamatea Pōkai Whenua", the name of a range of hills within the tribe's territory.
Te Ruru	Morepork, owl, <i>Ninox novaeseelandiae</i> - a native owl common throughout Aotearoa
Tū Mai Rongoā Māori	Literally "Rongoā Māori Stand Up". The name given to an online symposium whose full name is Tū Mai Rongoā Māori –

	Calling forth the mana of Rongoā Māori. This was held online on Wednesday 29th June 2022
ACC	Accident Compensation Corporation, the Crown Entity that administers the Accident Compensation Act 2001 in New Zealand
The Interim Māori Health Authority	An interim Crown Entity established in September 2021, ahead of the creation of Te Aka Whai Ora – The Māori Health Authority. At the time of writing, Te Aka Whai Ora is being disestablished (February 2024) subsequent to a change of government.
Waitangi Day	A public holiday in New Zealand. In this article we refer to the actual town of Waitangi in the far north of the North Island which marks the location of the first Treaty signing by representatives of the British Crown and over 40 Rangatira (chiefs) on 6 February 1840. For further context go to https://www.waitangi.org.nz/

Whakauae tikanga (values) in the article expanded:

Tikanga	How the tikanga is actioned at Whakauae
Rangatiratanga <i>Ko te Rangatiratanga te Kaupapa Nunui.</i>	We will uphold the right of Māori to determine their own aspirations and the pathways for achieving them. As an iwi-owned entity, Whakauae is accountable to the Ngāti Hauiti Rūnanga, through our own governance board.
Hauora Tangata <i>Ko te Hauora Tangata te Kaupapa Matua. Ko Ētahi o ngā Āhuetanga nui e pā ana ki te Kaupapa nei ko te Tinana, te Wairua, te Hinengaro me te Oranga o te Whānau.</i>	Whakauae embraces a holistic understanding of what constitutes good health for all. We acknowledge the dimensions of the physical body, spirituality, knowledge and understanding, along with the wellbeing of the entire whānau as the key principles of wellbeing.
Mātauranga <i>Ko te Mātauranga e Āheitia ana te Whanaketanga mō Ngāi Tātou, mo te Iwi Māori.</i>	We acknowledge that knowledge in itself encompassing academic achievement, excellence and mātauranga Māori is the key enabler of Māori growth and development.
Manaaki Tangata <i>He mea nui ko te Manaaki Tangata i roto i ngā Mahi Katoa, Ahakoa ko Wai, Ahakoa Kei Hea.</i>	In all of our activities, programmes and relationships, we will uphold high standards of care and respect for each other and all the people and organisations with whom we interact.
Ngākau Tapatahi Aurere <i>Ko te Ngākau Tapatahi me te Aurere te Waka Kōkiri.</i>	It is through professionalism, integrity, diligence and genuine passion that we aim to build our reputation and maintain true progress as a research service.

Source: Whakauae Research Services Ltd (2023). Annual Report 2022. Whakauae Research Services Ltd, Whanganui. p12.

Peer Review Article

Unearthing Beauty:

Towards a Leadership of Devotion

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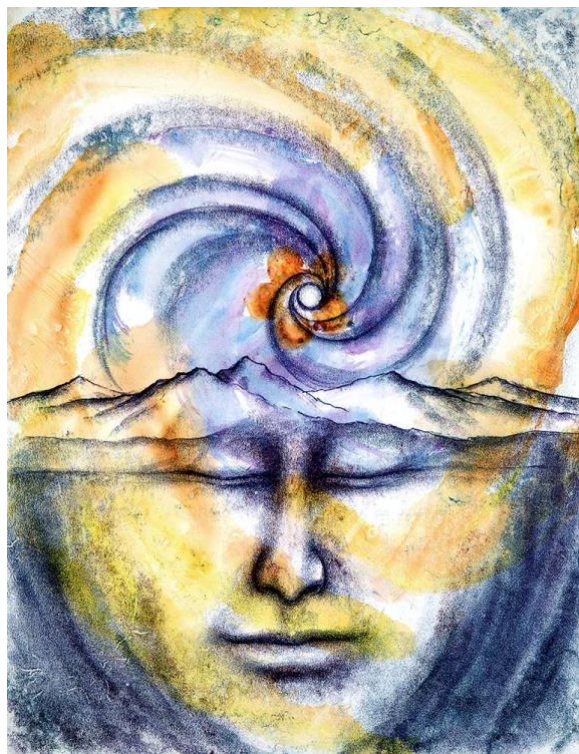
Abstract

This article explores the relationship between experiences of beauty and leadership in times of rupture. It draws from a broad trans-disciplinary literature centering beauty as an aesthetic experience that allows access to more holistic knowledge in the midst of uncertainty. Such an approach, it is argued, can offer leaders distinct pathways to cultivate greater awareness and capability as they sense into, and seek to generatively influence complex living systems. It then describes research where a group of systems leaders were offered a guided experience of beauty. Using an art-based methodology, the findings suggest beauty stimulated an increased aesthetic sensitivity to novel insights, emotions, and perspectives that fell outside of the participants' customary experience. Additional impacts included a felt-sense of connection with others, an invitation to express oneself more authentically, and a willingness to experience discomfort. Based on these findings, I argue that working with beauty, and with aesthetic processes more generally, may be a critical awareness practice that bridges the logical and the analogical mind and invites an attunement to something larger than the individual self that is at once transpersonal and ecologically grounded. Such an orientation, I argue, builds upon the principles and practices of complexity leadership to include a way of being that is both sensitive to beauty

and attempts to create more of it in the world. I call this way of being a leadership of devotion and argue its pursuit invites important inner work: the restoration of our capacity to feel, see, and act in service of a just and equitable future for all.

Keywords

beauty, aesthetics, complexity, leadership, devotion, awareness, capability, uncertainty



Soulcard by Deborah Koff-Chapin

Introduction

“Beauty is not always lovely” (Jeffers, 2012, p. 394).

The image Eli had selected was a spiraling swirl of paint, its edges light and colorful and its center a rich dark, almost black. There was a face in the image you could just make out, its expression a gaping yawn or silent scream that communicated ecstasy... or agony. It was, by Eli’s account, an image that resonated with his experience of beauty. His response echoed what was to become a common theme in this study: Beauty evoked a curious mixture of both longing and fear—an encounter with otherness that elicited a tentative yet uncomfortable trust to move into the unknown. He said, trembling, “I’m drawn [to beauty] but I don’t think it’s going to be an entirely happy encounter.”

Like many of us, I have been both blessed and burdened with a particular way I am sensitive to the world. I've come to understand it as a sensitivity towards *partiality*: the reduction of *interiority* such that an essential vitality is lost. I took refuge for decades in the cultural fringe of the performing arts where I witnessed the profound impact of highly aesthetic, emotion-laden experiences that appeared to call forth the whole-person. Working first with young performing arts leaders, and then increasingly with more varied groups, I became convinced that, though marginalized, the intelligence of the body, the heart, and the imagination—or, taken together, the *aesthetic dimension of knowing*, had something to offer contemporary leadership.

These observations informed curricular design first developed in partnership with colleagues at the Banff Centre for Arts and Creativity for what became a distinct suite of Systems Leadership programming. A few of us later founded the Wolf Willow Institute, a Canadian educational initiative that approaches whole-person, transformative learning as a critical systems intervention itself (Norris & Blakeman, 2021). We join a growing movement that blends social innovation and complexity theory and tools with less familiar pedagogical elements from the cultural margins. Our core premise aligns with a growing consensus (e.g., Arnold & Schön, 2021; Goodchild, 2021; Koenig et al., 2021; Senge et al., 2015; Westoby, 2021) around the need for a holistic leadership praxis that accounts for inner and outer realities, orients to possibility rather than predictability, and is embedded in relationship (e.g., Adler, 2015; see also Omer & Kramer, 2003).

A sensitivity towards the overly partial has also shaped this research, which explores the relationship between experiences of beauty and leadership in times of rupture. Drawing from *Imaginal Transformation Praxis* (ITP), a distinct approach to transformative learning and cultural leadership (Omer & Schwartz, 2021) that is in practice at Meridian University, beauty is explored here as a particular *state shift* that allows for novel insight. The findings suggest that experiences like Eli's may stimulate important, yet marginalized, ways of knowing. They convey that such encounters hold the potential to inspire what Wirt (1983) terms *ecstasis*: a state that liberates a person from the constraints of identity where more information (more feeling, more creativity, more connection, more perspective) becomes available. The psyche's nature to be affected by beauty—to be moved, touched, and stirred as appears to have been the case in this research—lends credence to the idea that a leader's engagement with beauty invites a departure from the known into a space where fresh learning might occur.

In this article I first present the research and then draw from these findings to demonstrate that working with beauty, and with aesthetic processes more generally, may be a critical awareness practice that bridges the logical and the analogical mind and invites an attunement to wholeness, authenticity, and possibility. Such an orientation, I argue, builds upon the principles and practices of complexity leadership (e.g. Uhl-Bien, 2021) to include a way of being that is both sensitive to beauty and attempts to create more of it in the world. I call this way of being a *leadership of devotion*. From the Latin root *devovere* (lit: to vow), I suggest

that a commitment to beauty can temper our resistance to uncertainty and take us beyond ourselves, allowing for our creative participation and alignment with a life-enhancing coherence on the other side of complexity. Finally, I explore a few possibilities of what a leadership of devotion might look like in practice and offer some suggestions for future research.

Thresholds, Edges & the Mysterious Nature of Learning

In rapidly shifting circumstances leaders are pressed to make critical decisions, often with limited time, unknowable variables, and insufficient data.

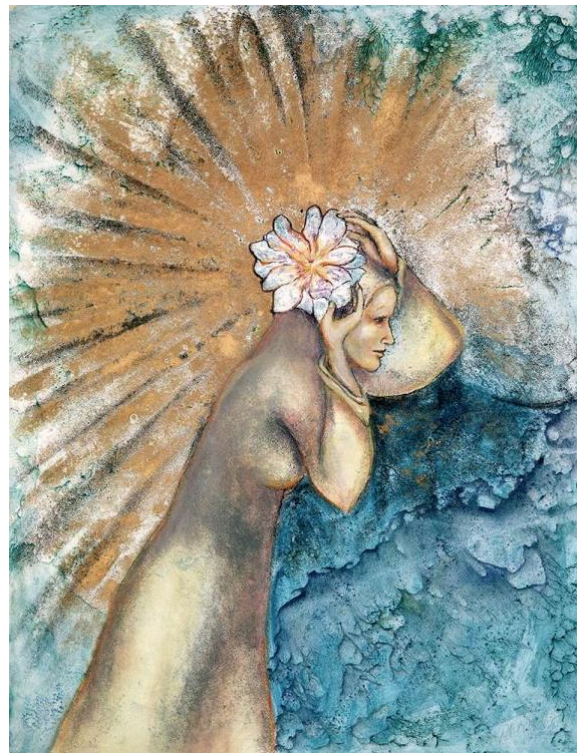
Advancements in information technology, the domination of market forces, ecological breakdown, interconnectivity, and artificial intelligence are just a few of the current trends that have launched the world into a new normal (e.g., Chima & Gutman, 2020; Stein, 2019). Given this landscape, many leaders, including this study's participants, find their experience demands something of them that customary logic cannot deliver (Theise, 2023; Uhl-Bien, 2021). These trends necessitate a shift in leadership praxis, away from management and leadership actions that apply myopic, tactical solutions in complex domains (Heifetz et al., 2009; Snowden & Boone, 2007) toward one that creates the conditions for a broader gestalt of human capabilities to emerge (e.g., Dirkx, 1997; Kegan, 2018; Norris & Blakeman, 2021; Omer, 2017).

Spanning multiple disciplines, *transformative learning theory* refers to processes that result in an expansion of our understanding of ourselves and the world around us (Mezirow, 1995, 1996; see also Clark, 1993; Cranton, 1996; Omer et al., 2012). This particular kind of learning sits in contrast to *instrumental learning* where knowledge gained is assimilated into existing mental structures (Dirkx, 1997, 1998; Mezirow, 2009). In transformative learning, a learner's *identity*, or their underlying worldview is itself at risk of change (Illeris, 2017.; Omer et al., 2012; Omer & Schwartz, 2021), permanently altering not only *what* is known, but *how* a learner knows it (Berger, 2004; Kegan, 2018). While such transitions are common enough in the natural unfolding of a human life, transformative learning can be accelerated in an environment that holds a necessary balance of both support and challenge (Kegan, 2018). In such spaces, learners are encouraged to take another look at deeply entrenched ways of seeing themselves and the world, necessitating a disciplined approach to encounters with *otherness* (Omer et al., 2012) and an aptitude for inhabiting uncertainty with grace.

Orienting to transformative learning through the lens of complexity invites an ecological view. It is at the edges of the natural world, suggest Dale and Leighton (2020), "that things really happen, where habitats blend, where life and death meet regularly, where tensions hold and change each other, where unexpected growth is possible and new life flourishes" (p. 7). Similarly, developmental (or evolutionary) opportunities arise in contexts of novel recombination or when certainty is no longer possible (Berger, 2004). If engaged rather than resisted outright, such contexts can present learners with an experience of *liminality*,

where something of their previous way of being begins to die or give way for the new that is not yet formed (Berger, 2004; Omer et al., 2012; Omer & Schwartz, 2021; Turner & Abrahams, 2017). This betwixt and between space is indicative of a point of departure from a previous homeostatic state. Such shifts are often marked by disequilibrium, disorientation, and confusion. Therefore, resistance to new experience is common (Omer et al., 2012).

And yet, emotion theorists (e.g., Nathanson, 1992), developmental psychologists (Berger, 2004; Cook-Greuter, 2005; Kegan, 2018) and adult educators (Dirkx, 1998; Mezirow, 2009; O'Sullivan et al., 2016; Taylor, 2017) believe that such demanding experiences can catalyze important change processes that can lead to capacity development. A truly whole-person approach to transformative learning invites an embodied, curious, courageous, and compassionate *turning toward* the full range of information that emerges beyond known-reference points. Doing so centers the mysterious nature of learning, inviting the learner into aspects of themselves and the world previously unknown to the conscious self, and re-balances critical reflection (logos) with the imaginative and poetic ways of understanding the self in relationship to the world (mythos) (Dale & Leighton, 2020; Dirkx, 1997; Omer et al., 2012; Plotkin, 2010).



Soulcard by Deborah Koff-Chapin

The Art of Beautiful Thinking

The literature on aesthetics is vast and conceptually complex. Deriving from the Greek *aisthetikos* (lit: 'sense perception'), modern, Euro-centric theory most often

defines aesthetics as a philosophy of art, focused on the characteristics of a visual object in relationship to the viewer. A minority view, and one that finds some resonance with Indigenous epistemologies, upholds the aesthetic experience as an *approach to knowledge* that allows for a profound and intuitive contact with life's underlying wholeness (Goodchild, 2021; Gross, 2002; Haugen, 2019; Madjidi & Restoule, 2008). Where a western paradigm believes wisdom, creative insight, and imagination are products of the individual mind, an Indigenous worldview recognizes that knowledge belongs instead to the land and is gained and transmitted through intuitive, relational, and artful means unsevered from spirit, relationship, and context (Goodchild, 2021; Madjidi & Restoule, 2008; Sheridan & Longboat, 2006).

Such an approach stands in sharp relief against the reductive and extractive modes of Western educational models. Yet, some parallel can be drawn in eighteenth-century Enlightenment philosophers who placed emphasis on the subjective *experience* of beauty (Korsmeyer, 1979). Baumgarten, for example, believed an aesthetic approach brings into harmony both the rational and the sensual as inseparable faculties of mind (Gross, 2002). If approached aesthetically, which is also to say, with our whole self, experiences cannot be reduced to parts or divided into smaller entities but remain as complex living processes that invite deeper understanding. Some would agree, in an aesthetic relationship with life, we not only develop knowledge, we experience *beauty* (Gross, 2002; Madjidi & Restoule, 2008).

Though little attention has been given to the psychology of beauty by emotion theorists, Armstrong and Detweiler-Bedell (2008) argue that beauty is a fundamentally *emotional* experience. They draw a useful contrast between the pretty and the beautiful. Beauty, they propose, is able “to create a psychologically novel truth out of a particularly demanding object or experience” (p. 305). *Pretty* things, on the other hand, can be defined as superficially pleasing, with simple and familiar attributes that are processed by the mind with ease, are quickly understood, and adhere to conventional rules of aesthetic judgment. They write, “pretty, fluently processed stimuli lack complexity and hence the capacity to inspire an intense aesthetic response” (p. 309). Beauty, in contrast, elicits what Immanuel Kant called a *feeling state* that draws the mind toward potential, possibility, and meaning (Coolidge, 1943). Armstrong and Detweiler-Bedell (2008) continue:

Beautiful objects resist fluent processing, thwarting conceptual understanding while nevertheless offering the prospect of such understanding. Although we may not understand a beautiful object (insofar as its features do not come in a familiar bundle), we sense that perhaps we could and that such understanding would be particularly meaningful to us (p. 309).

This idea that experiences of true beauty evade immediate apprehension and move us to pursue greater meaning is aligned with other, non-western conceptions of beauty. Japanese aesthetics, for example, originated in a Taoist

understanding of the world as one of constant change and flux and life, intensified by impermanence. Expressions of beauty are humble, delicate, asymmetrical, and often contain imperfections which exhibit an aesthetic ideal of aligning with nature and embracing opportunities in each moment for self-cultivation (Prusinski, 2013). For the Diné people, on whose territory I now write, the “Beauty Way” not only invites a way of orienting to life that aspires to harmony, goodness, and blessedness (Kahn-John & Koithan, 2015), but reinforces a sense of deep respect, kinship, humility and right relationship towards all life (Emerson, 2014). Of critical distinction for complexity leaders, one thread of modern aesthetics similarly positions beauty to be neither the end result of an interaction, nor a quality a thing might possess, but rather an orientation to reality that accounts for plurality, complexity, and relationality. Because a single perspective can never fully grasp the complete whole, what Baumgarten called the *art of beautiful thinking* presses a person to reach beyond herself in a continual process of developing both capability and awareness (Gross, 2002).

The art of beautiful thinking may be a useful practice today. Complexity limits predictability and shapes the adaptive challenges to which leaders must respond. Uncertain contexts, in which we are unable to ascertain where, when, how, or why an event has occurred or will occur in the future (Allen & Boulton, 2011), may be best met with an inner and an outer gaze, at once analogical and analytical. For Adler (2015), this kind of holistic seeing partners with science and logic while simultaneously acknowledging the *unknowables* that besiege most leadership contexts. Such an approach, she says, allows us to see “reality accurately, yet differently” (p. 481), equipping leaders with the insight to create from a fresh perspective. Jones (2006) compellingly speaks to the aesthetic space that he believes leaders today must inhabit. He writes:

In times of uncertainty, we need to look to the spaces between for order and coherence—to gifts, beauty, grace, voice, and wholeness—what may be called the *commons of the imagination*. Awakening to the presence of the commons in both the person and the public imagination is our new art form. It is also the leader’s new work (p. 1).

If leadership is, in its broadest scope, about influence, beautiful thinking would turn leadership into a form of artistry, tasked with transforming what Adler (2015) describes as the 21st century’s “long experiment with ugliness” (p. 482) back into beauty (see also Klein & Diket, 2006). In thinking beautifully, we open to future possibility, the pursuit of which, we might intuit, will yield future wisdom. Where experiences of the pretty may allow for avoidance of the unknown and confirm knowledge we already have, beauty can lead us down a path toward greater knowledge. It can take us to places we have never been before.

Research Approach

To gain insight into the impact of a guided experience of beauty, this research explored the qualitative experience of a diverse group of North American leaders all of whom were explicitly bringing a systems perspective to complex challenge domains. These included urban transportation, the energy sector, Indigenous community development, the pharmaceutical industry, public health, and the philanthropic sector, for a few examples. The data collection occurred over eight weeks and included one individual meeting with each participant and two group meetings conducted using video conference software. The study drew from Omer's (2016) Imaginal Inquiry, a participatory methodology and a component of Imaginal Transformation Praxis that integrates heuristic, phenomenological, and art-based approaches, and explicitly seeks to stir creative action and catalyze transformation. It is structured into four distinct phases.

The first phase, *Evoking Experience*, took place in one-on-one video interviews. Using Deborah Koff-Chapin's *Soul Cards*, participants were invited to choose an image that resonates in the moment with their experience of beauty. Through a series of questions, participants were guided to explore how they were affected by beauty by letting the images "speak." This personification was intentional. In working with images as if they were autonomous worlds rather than symbols to be interpreted, a person can find themselves in an intersubjective dialogue with a voice that may or may not feel like their own (e.g., Bosnak, 2003; Hollis, 2002; Knill et al., 2005; McNiff, 1998).



Soulcard by Deborah Koff-Chapin

The second phase, *Expressing Experience*, included any moment in the research design where participants are invited to share or to express (verbally or nonverbally) how they had been affected by beauty. This phase culminated in a three-hour group session where participants were given five minutes to prepare and three minutes of time each to lead the group in an experience informed by beauty. Participant's leadership enactments were each unique and included contemplative, creative, and participatory invitations.

Interpreting Experience, the third phase, included intentional moments of pause to reflect on the experience. A focus for this phase of the research included identifying key moments that felt meaningful. Verbal and written sharing were encouraged as a way of inquiring into how one had been affected. As researcher, I also spent time writing how I was affected, thus situating myself inside the research.

Integrating Experience, the final phase, included elements of the research design that help participants integrate, embody, and carry forward their insights. Integrating elements included journaling, dialogue and group discussion, clear beginnings and endings, and time at the end of the research period for the group to discuss initial findings.

All data was collected through video and audio recordings and written responses. Interpretive data analysis, rooted in Imaginal Process, began with the ongoing identification of key moments as heuristic threads (Kadyschuk, 2023; Moustakas, 2015; Omer, 2016). I read and re-read the transcripts and journal entries after each session, then went through to color code themes that had begun to emerge. At the end of this process, I had a condensed synopsis of each experience in thematic form. These themes became more meaningful in iterative conversation with the research participants in the final phase and against my own subjective experience. Imaginal Transformation Praxis served as the theory-in-practice that further focalized the findings against the concepts and principles of transformative learning (Omer, 2016). Because experience has dimensionality, themes were generated not only through conversational analysis, but in observing what was expressed through affect, body language, and art (Omer, 2016). Congruent with arts-based research, this process of analysis was largely intuitive and holistic (Leavy, 2017; McNiff, 1998). Meaning was made with others and resulted in greater reflexivity, shared awareness, and insight through multiple ways of knowing (Leavy, 2017; McNiff, 1998).

Research Findings

Four core themes emerged from the study that hold relevance for leaders working in complex contexts: beauty as guide; beauty and liminality; beauty and authentic connection; beauty and discomfort. The direct quotations from participants in the findings were collected in research interviews that occurred between February and May of 2020. Informed consent was procured from each research participant in writing prior to participating in the study. Each of the

participants (Olivia, Sani, Julia, Eli, Aria, Vivienne, Mia, Sophia, and Sebastian) has been given pseudonyms to protect their confidentiality.

Beauty-as-Guide

Eight of the nine participants explicitly described beauty as a form of *guidance*. Working with the images they had selected in phase one, they referred to beauty as a “lunar wisdom,” a “higher power,” an “angel,” a “guardian presence,” and a “guide to the inward journey” for a few examples. Aria named an “omniscient being in between the realms” that “pulls me forward,” while Julia spoke to the ever-present possibility of connection with the “wider cosmos.” In a tender moment, Olivia said that beauty offers “essential truth,” and a way to rediscover what is already known. Beauty said to her, “seek connection to source to navigate in complexity. You are not alone.”

Beauty’s guidance was not concrete but appeared to invite participants to encounter aspects of themselves, emotions, or perspectives that were unfamiliar. Sophia was surprised by her choice of image. She described it as “uncomfortable” and “a little disturbing” how the characters in the image appeared to have a “lack of personal identity...a mass of bodies where you can’t really tell where one ends and the other begins.” She identified beauty in the imperfections. In closing reflections, Aria named that she often felt “at the edge of her vulnerability” with “mystery guiding.” Yet, even amidst moments of tension, beauty was not questioned as a useful and powerful guide. In Meeting Three during a period of reflective dialogue on the study, Sebastian offered the metaphor of delivery. He said, “birth is so often considered a beautiful thing, and yet, it’s also incredibly painful and traumatizing to a body. There’s something about the duality of that, of the deep beauty and the deep pain that is also about bringing something forth.”

By allowing themselves to explore how they were affected by beauty, participants appeared more able to access novel insights, sensations, and emotions. Seven participants spoke to the need to pause, to deeply listen, to feel, and to proceed slowly. In this way, participants were able to experience a relationship with uncertainty by consciously inhabiting the unfamiliar without immediately reaching for quick interpretations or actionable outcomes. *Otherness* can be thought of as an encounter with an aspect of oneself (subjectivity, emotion, image, etc.) or with another that is perceived to be outside the boundaries of the known (Coelho Jr & Figueiredo, 2003; De Luca Picione & Freda, 2022; Omer et al., 2012; Waddock, 2014). This relational dialectic engendered a deeply affecting intimacy with the unfamiliar. Drawing from the participants’ expressions, such experiences demonstrated beauty’s potential to disrupt what Omer et al. (2012) describe as the “comfort zone of familiarity” (p. 378)—an experience that unsettled as much as it soothed—and was colored by discomfort and confusion as much as it was by awe and grace.

Beauty and Liminality

Beauty precipitated an experience of movement from a steady state, or singular perspective, to a more permeable, *in-between* state that one participant described as “becoming.” Many participants offered spatial metaphors (such as a “journey,” a “stretch moment,” or a “fulcrum”) to describe how they were feeling. They expressed or enacted a reaching outward; from one mindset, vantage point, or one internal subjectivity to another.

Vivienne shared the way beauty affected her. She said, “grief and rage are affects that move me and therefore have the power to shift structures and states.” These catalyzing affects live *in-between*—in the becoming space of beauty that is the “opposite of sterile.” In her beauty image, Julia was drawn to “the nature connection and the permeability, the lack of barrier between human and nature, below and above...it’s all just a kind of continuous flow.” Although she found herself uncomfortable with what was evoked for her, Sophia was prompted to think about perspective, “I think about the way we perceive things from our place, whatever that might mean.” Relating her reflection to the way she approaches her leadership, she said, “I am always trying to see [beauty] through other people’s eyes.” She titled her beauty image, “Worldviews.”

Consistent throughout the study, participants did not problematize disequilibrium but rather appeared eager to more curiously explore the various possibilities—both joyful and difficult—that the liminal space made visible. They navigated the study in a skillful sense-full-ness; listening, looking, feeling, and sensing with all modes of perception open. Participants *attended* to multiple sensations and perspectives at once, deriving from the root *ad*, meaning to move toward, and *ten*, to stretch. In liminality, one may stretch toward a multitude of latent possibilities and marginalized perspectives; a landscape that Sebastian described as a “kaleidoscope of exploration.” It was as if the participants found themselves inhabiting a *betwixt and between* place where they were rendered “permeable” to an immensity of unseen interconnections and flows of information that they were largely open to exploring.

Beauty and Authentic Connection

The navigation of relationships was a strong theme throughout this study. Meeting One invited participants to reflect on the ways their work is complex. Six of the nine leaders directly related complexity to relationships in some way. Julia said: “human beings are by nature complex, our relationships are complex...it’s the web of relationships, and how we navigate interpersonal dynamics that ultimately create whatever change we’re seeing in the world.” Sani mentioned that “cookie-cutter racism” was one element of complexity she dealt with daily in her work. The “multi-level or fractal aspect of our human experience on an individual, collective, and systems-level” was the backdrop of Sebastian’s life and work, which he described as “inherently complex.” The relationships, he said, were one of the more difficult aspects. “How to be good

humans together?” was the central question he held in his work, and a “big hurdle.”

Invariably, while all nine participants cited interpersonal or collective differences as one of the more difficult aspects of their leadership, beauty appeared to create the conditions where difference and connection could coexist. This finding was made most explicit in the leadership enactments and the reflections afterward. Sani shared that the diverse way each person led was what she would take away from the experience. She said, “it’s interesting how we can be so distinct and connected and be one.” She later reflected in a journal entry that she was “looking at each person and observing myself...I was feeling the feedback loops we were generating across, between, and amongst each other.” Mia wrote, “I feel woven into a fabric of beauty and feel the enoughness [sic] of my own offering alongside that of others.” Eli shared that “the connection to each person’s story, their place, and their own experience of beauty” resonated with him. He said it was “a sort of coming together, a feeling of solidarity and support.” Sophia, in describing what was most impactful, shared, “I like that we come from different places and experiences, but I felt a lot of commonality [sic]...and trust.” Vivienne reflected that the “experience of beauty is deeply personal and shared between us.”

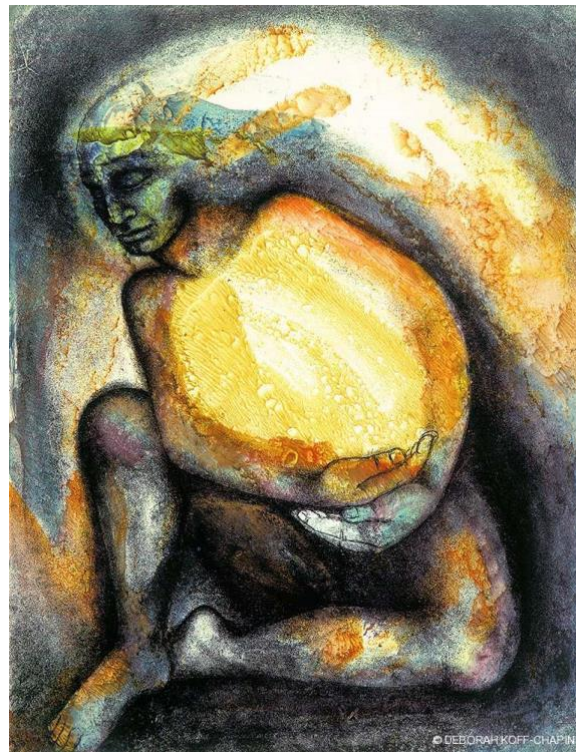
Not only did participants feel connected, but they also felt able to offer something they described as *authentic*—of their essential self. These were vulnerable moments generally thought to be beautiful to others, often punctuated by strong emotion. As a part of their integration, participants began to describe beauty as something ever-present, waiting to be uncovered. One participant said, “it’s sort of like an unearthing process...a process of uncovering something that’s already there, that’s authentic, and...we’re just unpacking whatever layers we’ve put on top of it.” Aria, speaking from her culture, reminded us of the Indigenous perspective that sees beauty as something that “comes through the land, and comes through culture and context” that “allows us to walk through in a way that’s beautiful.” She said, beauty “originates from the center in which we all belong.” Throughout the study, she likened beauty to that which can “awaken our inherent knowing.” As if in agreement, Mia referred to beauty as “a placeholder for something that’s powerful and potent and life-giving.” In journal entries, all nine participants expressed feeling inspired, connected, open, and appreciative of one another’s unique gifts. Beauty stimulated connection without removing the potency of difference.

Beauty and Discomfort

Because beauty appeared to move participants into new terrain, it also required a willingness to experience discomfort. Sophia saw amorphous figures in the image she chose that were uncomfortable. They were unidentifiable and indistinct, as if in transition or struggle. In sitting with her image, she recognized that beauty dwells in cracks of brokenness. Later in her journal entry,

she wrote that beauty may dwell in a wound, in the transmutation of horror and pain and the struggle that comes with difficult life events.

She was not alone. Beauty connected participants with strong emotions such as grief, rage, hope, and despair. Vulnerability was a constant, both in participants observations of each other, and in their own felt experience. For Mia, Vivienne, Sophia, and Aria beauty was linked to a vulnerable shattering or awakening. It could be said that such moments of intensity (such as the death of a loved one or a painful diagnosis) affected them deeply, catalyzing a kind of inner movement, a period of reflection, a time of disintegration or disorientation, a journey of difficult struggle and of pain and extreme vulnerability. In reflection, each participant spoke to (and embodied) some of the ways they have grown, gained perspective, and developed capability for having been so stretched. Sophia and Vivienne in turn invited others to sit in the discomfort and the pain, to welcome it and be changed by it. Their recommendations gesture to the trust that emerged from times in their lives that were challenging. Beauty in the eyes of many of the participants appeared as both a generative and destructive power.



Soulcard by Deborah Koff-Chapin

Discussion

Uncertainty & the *Moreness* of the World

Taken together, these four primary themes demonstrated that experiences of beauty hold the potential to catalyze a particular shift of consciousness. Beauty's

impact appeared to make visible a greater, and more inclusive set of possibilities and perspectives in the moment. Participants found themselves in territory without familiar reference points, and able to cautiously pursue what they perceived as a form of inner guidance. Like Baumgarten's *art of beautiful thinking*, beauty appeared to catalyze an opening to a source of aesthetic information. It lets something new in, initiating a process of deeper reflection and action where important learning can begin. While the limited scope of this study prevents me from making any claims for long-term transformative change, we might speculate a little on the relevance of these findings for the field of awareness-based leadership.

In a global context of growing polarization, beauty evoked a fecund edge space—a landscape of paradox where longing and fear co-exist. Such a landscape strikes me as a worthwhile place for a leader to dwell, where an intimate experience of complexity and its gift of disorientation, might press one to pause, reflect, and touch greater possibility. Yet, more often than not, this kind of learning triggers a natural immune response to the psychological discomfort of uncertainty that can result in avoidant, maladaptive strategies (Bar-Anon et al., 2009). While most agree that true change requires a transformation of both self and system, it is far from certain that even self-aware leaders will find the transformation on offer tenable. An edge space, whether sought-out or stumbled upon, is still edgy. To the part(s) of us who have found belonging, safety, and dignity-enough (Haines, 2019) in the world we know, the *edge*, though great in theory, becomes existentially risky in practice. This makes beauty's catalytic impact all the more striking. Despite the ubiquitous presence of uncertainty, participants were compelled to trust in beauty's guidance.

Perhaps this is because beauty was perceived of as something larger than the self—a transpersonal force, or form, or presence that brings us beyond ourselves into the *moreness* of the world. Participants spoke of dipping beneath the surface or "unearthing" as that which allows for the authentic (in Greek: *original, genuine, or principled*) to inform action. The concept of unearthing couples beauty to that which is of the earth, protected by the earth, beyond the concrete, or of a deeper order. These references give reality a dimensionality that counters the anthropocentric disenchantment of nature that has been the hallmark of modern rationality.

In this study, as in many wisdom traditions, beauty was experienced as something synonymous with the *sacred*; a visible representation of the holy, or a manifestation of divine interconnectedness, balance, or harmony. Linking beauty with the sacred raises existential questions—a meta-inquiry that places the human experience in what Stein (2019) describes as "its broadest possible context" (p. 264). Our conception of beauty, and relationship to it, brings us into a landscape of significance—one both able to include and transcend our wariness of the unknown. Psychologist Virginia Satir famously proposed that the strongest human instinct is to keep things familiar (Bandler, 2008, p. 7). These initial findings offer a counter-truth. Resistance to uncertainty may be an important

adaptive strategy in a fractured world, but hidden in plain sight, just beneath the surface lies an even more motivating *feeling state* that can take us to visionary, life-enhancing places. Beauty may be an unguarded doorway.

A Leadership of Devotion

“There is only one question, how to love this world” (Oliver, 1990, p. 6).

Beauty catalyzed a state-shift that seemed to allow participants access to distinct qualities such as humility, openness, trust, collaboratively, wholeness, authenticity and acceptance. They described their experience as connected, moving, inspiring, and meaningful. Beauty provoked important ontological reflections; *who am I? What’s my purpose? How do I show up in these times of change authentically?* And it encouraged non-judgmental witnessing and intimate acts of shared leadership that helped create a space of psychological safety, trust, and belonging. Because beauty appears to take us beyond ourselves, leading from beauty may be more a devotion than a discipline—a way of giving our whole being to something greater in times of rupture. A *leadership of devotion* would begin as a commitment or a stance that vows to both see, and then serve the underlying wholeness, sacredness, or expressions of life that allow for mutual thriving without erasing or denying beneficial complexity.

Alexander (2016), in describing an underlying pattern language of built structures, speaks of coherent centers in nature that “come about as a result of cooperation between the other living centers at several scales, which surround it, contain it, and appear within it” (para. 25). Architecture becomes a contribution to the world when it aligns with this pattern to promote a sense of wholeness and entirety at multiple scales. For him, this way of seeing is both soberly scientific and deeply spiritual, for it allows us to connect with the sacred in practical ways (such as the feeling quality of a building or doorway) that promote further life. A leadership of devotion would similarly root into the fecund space of *both/and*—of science and spirituality, of the human and the more-than-human (e.g. Abram, 2012), of the concrete and the subjective without negating either. Devoting oneself to beauty would, in other words, undermine partiality, allowing for a more generative relationship with complexity, which, by nature, invites us into the not-yet-known and the unknowable. What would such a devotional practice look like in real-world leadership contexts? Based on the experiences of participants, this inquiry suggests several possibilities:

1. **State Shift** – experiences of beauty can catalyze the shifts in consciousness that are critical for deeper collaborative inquiry processes, collective resonance, and skillful action. They erode partiality and ‘beautiful thinking’ seems to emerge most freely when aesthetic, somatic and land-based inquiry processes enrich purely cognitive and analytic approaches. In leadership contexts, increasing our sensitivity in this way would not only promote wiser, more informed action, but would also enable leaders, like artists, to help make visible to others latent

possibility—in themselves and in the world. After all, we cannot take action on something we cannot first see or imagine.

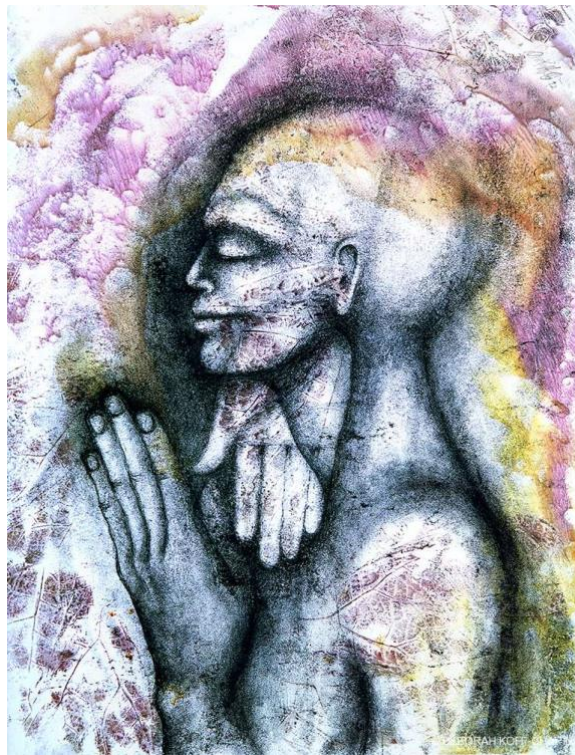
2. **Connection** – beauty de-centers anthropocentrism and the isolated persona, consciously welcoming the more-than-human, the ecological and the sacred into a wider ‘social’ field. It unsettles linear time, acknowledging the influence of the ancestral and the consideration of future generations here in the present moment. It not only makes visible but invites a *felt-sense* of connection and the responsibilities that flow from that.
3. **Wholeness & Authenticity** – beauty invites the full expression of our humanity—including those facets that are less familiar to us. Honoring our own multiplicity, our interior complexity, our full-feeling and expression is one way of recognizing the inherent dignity and beauty in all things. For Laszlo (2012), it is precisely this embodiment that enables us to move from dissociated thinking about change, to being the change, suggesting:

The expression of systems being is an integration of our full human capacities, the expression of an evolving humanity. It involves rationality with reverence to the mystery of life, listening beyond words, sensing with our whole being, and expressing our authentic self in every moment of our life. The journey from systems thinking to systems being is a transformative learning process of expansion of consciousness—from awareness to embodiment (p. 101).

4. **Harmony** – a fidelity to beauty reminds us that right relationship is the central task of all leadership. It reminds us that self and system are never separate and we cannot thrive in a system that is out of balance. A devotion to beauty requires a practice of attending to the quality of all our relationships—with ourselves, with those around us and with the living earth at multiple scales—or we are likely to simply reinforce systemic patterns of disharmony.
5. **Mystery** – beauty offers a way to embrace uncertainty as a powerful teacher. It invites a practice of open-hearted curiosity in the face of the unknown and unknowable even as we are stretched in its destabilizing presence. Centering Mystery also invites a regular practice of staying in relationship to that which we might sense at the edges, but do not yet understand—whether this be a vision for the future, a personal longing or fear, an unfamiliar or difficult life experience, or anything else we might perceive of as *other*. The intimate process of *coming to know*—be it a sensation, a strong emotion,

or a person sitting across from us, might shape, or reshape, the world.

6. **Transformative Leadership** – A guide that can be good company at the edges is not certified in a weekend but forged in the cauldron of transformative learning. Doing so at scale may require a courageous and widespread reinvention of many of the helping professions—blurring the lines between leadership education and initiation. Initiatory leadership development gestures to a different order of practice entirely—one oriented to the depths. It would invite the kind of awareness that comes not just from critical reflection and human-to-human dialogic practice, but from a wilder intimacy with the particular way we are called to participate and come to know our gifts within the world.



Soulcard by Deborah Koff-Chapin

While it would be a stretch to say this research demonstrated that experiences of beauty help to build the capabilities that support a leadership of devotion, the relevance of the findings is non-trivial. It is broadly aligned with research findings on the developmental impacts of beauty, creativity, wonder, and awe. Looking at creative expression, Salami reminds us that black feminists, a group historically denied access to education, have long looked to the poetic, intuitive, and depth-based forms of knowledge production as a way to gain insight—a reconceptualization of knowledge that, Salami writes, results in

emotional intelligence (Salami, 2020). Experiences of profound beauty, according to Cohen et al., for another example, can increase “other-focus,” and result in an increased understanding of self in the world—a finding that resonates with Diessner et al., who found beauty to evoke a felt sense of “unity-in-diversity” that may act as a developmental bridge into moral action (Cohen et al., 2010; Diessner et al., 2006). Beautiful vistas, experiences in nature, religious awakening, or impactful pieces of art that evade conceptual understanding can also stimulate *awe*, which Stellar et al. describe as an epistemological emotion that promotes the cultivation of greater humility (Stellar et al., 2018).

As the world grapples with the reality of *polycrisis* (Homer-Dixon et al., 2021), it is exactly these qualities that are required to even imagine an equitable and just future for all, let alone to begin to build one (e.g. Chima & Gutman, 2020; Waddock, 2014). Leadership that can inspire generative change in a time of social, political, and ecological fragmentation, demands not only personal transformation at beauty’s hand but an obligation to its perennial companions, *goodness* and *truth*. All too often, the actions of contemporary leaders require the denial of fundamental truths, such as the aliveness, interconnectedness, and finite nature of life on earth (Andreotti, 2021). Leading from beauty disrupts the trance of business-as-usual. If ugliness represents the fracturing or erasure of wholeness, harmony, or beneficial complexity, then much of what passes for instrumental or even “effective” leadership today is an affront to beauty. An orientation to beauty would not allow for individuals, organizations and initiatives to become better adjusted, more profitable, or increasingly competitive inside systems of indifference. Beauty demands a moral reckoning—if it’s not good for the world, it’s not beautiful.

Patterns of leadership that are rooted in such awareness require an authentic connection to the sacred, numinous, the meta-systemic, the complex, the *whole*. These initial research findings offer a promising consideration. Orienting to beauty may be an awareness practice that would take leaders and their people not only deeper into themselves, but deeper into the world. Doing so may help leaders stay oriented to how things are meant to be at some essential level—or even perhaps, to how things *could* be. In a world arguably consumed by ugliness, entranced by the artificial, tawdry, and mechanistic, and in many cases without a moral compass, perhaps it is, as Winterson (1997) believes, that neither “art nor beauty are optional in a sane society” (p. 89).

Final Thoughts

A leadership of devotion would allow us to see that a sensitivity to beauty, so long relegated to the arts, has much to offer awareness-based leadership. If we cannot feel what moves us, we are numb and can only do the kinds of things that numb people do. Perhaps beauty shows a way to begin the risky work of restoring the interior—our capacity to imagine, to sense, to feel, and to think in an integrated way so that we can more skillfully move into creative, ethical action. In doing so, the goal is not to be sentimental; it is to be *sentient*. To be fully alive,

engaged, and aware (and to see and evoke the same in others) so that we may take up the blessing and burden of leading artfully.

At a time that urgently requires the maturation of individuals, collectives, and societies in order to respond to a cascade of adaptive challenges, it would be prudent to further research connections between beauty, moral development, and generative action. Future studies might explore pedagogical approaches to leadership development that center beauty, and explore the impacts of an ongoing practice of beautiful thinking. This research emerged out of an ongoing, interdisciplinary conversation at a perilous global moment. While most of the existing literature explores the theoretical and metaphorical connections that can be made between the arts and leadership, this study sought to turn toward the direct experience of systems leaders who encounter beauty in the midst of uncertainty. What wisdom may lie in these pages is offered as clay—to be further molded in conversation and, hopefully, to be put into practice through a myriad of small experiments, both formal and informal.

Over the course of this study, I have come to understand beauty as an emergent property of intimate relationships, found on the edges of longing and fear where certainty is elusive. Perhaps, in devoting ourselves to beauty, our ways of engaging uncertainty become both adequately complex and coherent, drawing from a wiser, and more soulful visionary source. I hope this risky restoration of our interior—both individual and collective—may equip us with the blessing and burden of leading artfully. In the words of Wendell Berry (2012), “This is no paradisaal dream. Its hardship is its possibility” (p. 217).

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Peer Review Article

Hedgerows, Hedgehogs and Campus Biodiversity:

A Prickly Challenge for Universities

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Abstract

Across society, organisations find themselves challenged to address the climate and nature emergencies. Universities have a complex set of responsibilities given that they are preparing students for an uncertain future in which the very survival of life is in the balance. A characteristic of this complex challenge is the need to develop the necessary ecological and vertical literacy required to tackle the many aspects of fragmentation we are subject to. The 30x30 biodiversity challenge provides universities with an opportunity to address one particular form of fragmentation, that affecting habitats. The case-study presented here explores how a Hedgehog Friendly Campus (HFC) initiative allowed awareness of hedgehog habitat needs and in particular the health of hedgerows to feed into campus environmental management. A surprising finding is that addressing the fragmentation of hedgerows highlights organisational fragmentation, with little communication between landscape managers, research and teaching. A collaborative systems approach to the biodiversity challenge is thus needed and

realising this will challenge universities to build their capacity to embrace research and learning for sustainability through living lab projects. This requires a recognition of the responsibility universities have to enable action learning across disciplines in ways that will connect staff and students to, and bring them into relation with, the biodiversity crisis at a local level. The HFC initiative provides a rich opportunity for communities of inquiry and practice to be nurtured and for this process to inform the evolution of our understanding of habitat restoration on university campuses as a corporate responsibility.

Keywords

hedgehog friendly campus, vertical literacy, action learning, habitat fragmentation, 30x30 biodiversity challenge, universities, corporate social responsibility and sustainability

Introduction and Aims

This paper sets out to explore some “prickly and thorny” questions about how universities can evolve their understanding of their responsibilities at a time when we are waking up to the challenges posed by the inter-related planetary crises of biodiversity loss, pollution, and climate change. It does so with the help of two prickly life forms: the hedgehog and the hedgerow.

This paper first introduces the reader to the modern university as a “future fit” (Sterling, 2013) organisation¹ that prepares students for life on a planet in crisis, with all the complex challenges this presents. One of these planetary crises is biodiversity loss arising from a perfect storm of factors including habitat fragmentation and ecological desertification. Global society is challenged to respond to the biodiversity crisis by bringing more land into management for nature, presenting universities with a range of new responsibilities to engage with. However, engaging with such responsibilities cannot be undertaken without a deep understanding of context writ large, for these are not isolated jigsaw pieces but part of a puzzle of our own making. This introduction therefore moves from the global to the local by considering how the wider challenge can be interpreted at the level of university campuses. It presents a critical review of higher education in a time between worlds (Rowson & Pascal, 2021), highlighting the need for universities to radically address the disciplinary fragmentation, reductionism, and specialisation that has characterised education and to teach for ecological literacy. This exploration of the responsibilities of universities where biodiversity loss is concerned is then explored using a case study in which we consider the University of Edinburgh’s development of climate and

¹ Universities as organisations are typically afforded charitable status in the UK and therefore seen as part of the public sector. They are, however, vulnerable to being corporatised.

biodiversity strategies and how a specific example of conservation and ecosystem health can help us better understand our responsibilities. The focused example centres on work undertaken, as part of the Hedgehog Friendly Campus (HFC) project, to ensure that campuses provide a healthy, life-sustaining environment that supports this insectivorous small mammal, allowing them and the wider ecosystem to thrive. The authors contributed to this case study as ecological advisors, dissertation supervisors, active members of the workgroup coordinating the HFC initiative on campus, and as developers of the campus mental health and wellbeing strategy.

The case study presented here sets out to demonstrate how initiatives such as the HFC can serve as vehicles and focusing tools for universities as they prepare themselves to take on the nature and climate emergencies. Committed engagement with these initiatives and the underlying emergencies will necessarily challenge Higher Education institutions to reconsider their social responsibilities.

Universities and their Corporate and Social Responsibility

Any carefully considered exploration of universities and their wider responsibilities to society, humanity, and the planet must consider not just what they are in any physical sense but what they are *for* (Boulton & Lucas, 2011; Collini, 2012). Jarvis (2001, p. 4) emphasises the extent to which higher education is caught up by the whirlwind forces of globalisation which exerts irresistible pressures that threaten the ability of the sector to serve the greater good. The purpose of universities and therefore their responsibilities have, arguably, long been allowed to dance to the short-term whims of government, market priorities, and funding. This can be thought of as a social pathology, arising from a myopic misunderstanding that universities exist primarily to prepare people for work and to contribute economically. Any such view, however, reduces the purpose of life to work and denies us the very possibilities that can be realised when our potential to contribute to a life-sustaining society (Macy & Brown, 2014) is nurtured by an educational system that values thriving and flourishing into the future (Wilson-Strydom & Walker, 2015).

The UN Secretary-General, in 2011, during the World Economic Forum Session on Redefining Sustainable Development described our current economic growth model and consumption with the words: "For most of the last century, economic growth was fuelled by what seemed a certain truth: the abundance of natural resources. We mined our way to growth. We burned our way to prosperity. ...Over time that model is a recipe for national disaster. It is a global suicide pact..." (United Nations, 2011, paras 2–3). This model is part of the contemporary civilisation built over the last four centuries through scientific, industrial, and technological revolutions. The modernist project with its illusions and pretensions of progress entails an "irresolute process of secularisation and also the growth of civic and commercial institutions powered by bureaucratic and instrumental rationality and an exploitative relationship to nature" (Rowson &

Pascal, 2021, pp. xxv–xxvi). This is only possible when institutions wear blinkers, ignoring the collateral damage of colonialism, slavery, fossil fuels and modernism’s exploitation of nature.

Where does this leave us when we recognise that the socio-economic principles we live by are destroying the planetary life support systems we depend on? This question drives right at the heart of the tensions between accumulative profit and seeking to contribute meaningfully to life, greed and generosity, ego and eco (Scharmer & Kaufer, 2013; Scharmer & Yukelson, 2015). It cuts through to the question we must live into: if education prepares us for life rather than work, how do we nurture life? In many respects, this is about nurturing relational practices, about community (McIntosh, 2022, pp. 197–99) and our praxis as practitioners of life and for life. To understand this better, we need to recognise that, despite the growing body of work on sustainability in the Higher Education sector (Ruiz-Mallén & Heras, 2020), processes of organisational change are still not well understood (Hoover & Harder, 2015) and there is a need to develop an understanding of reflexive and cultural processes (Stephens & Graham, 2010). With this in mind and to better explicate the responsibilities of universities, it is helpful to draw on critiques of the university as an organisational centre of integrative learning and vertical literacy (Scharmer, 2018).

Otto Scharmer’s work has repeatedly revisited the need for pedagogical practice to deliver the intellectual, emotional, and spiritual intelligences (Scharmer, 2009, pp. 447–449) required to bridge the ecological, social, and spiritual divides we face today (Scharmer, 2016). He argues that, where the scholastic university was characterised by its teaching (transmission of knowledge) and the classical university by the unity of teaching and research (knowledge acquisition and production), there is a need for us to reinvent educational institutions around the interplay of a more comprehensive ecology of knowledge that leads to civilisational renewal (Scharmer, 2009, 2018; Scharmer & Kaufer, 2000). This third-way recognises the importance of self-reflective and self-transcending epistemologies and the need for universities to integrate not just research and teaching, but transformative change into teaching, so that we no longer reproduce the “same old same old” but can intuit and deliver healthier emergent futures (Peschl & Fundneider, 2014). This recognises the need for a paradigmatic shift from *autopoietic* (self-reproducing) to *sympoietic* (co-evolving with) approaches if we are to rehabilitate and make liveable again the environments with which we are in relationship (Haraway 2016, p. 33).

Universities therefore need to fundamentally revisit their understanding of social responsibility in terms of our practices of connecting and the connections we make possible, nurture, and deny. Interconnections are everywhere and yet human exceptionalism and bounded individualism (Haraway, 2016, p. 30) have come to characterise the culture that emerged from the imperialising 18th Century, blinding us to our interconnections and interdependencies with natural systems and the ecosystem services they provide. Haraway challenges us to ask:

What happens when the best biologies of the 21st century cannot do the job with bounded individuals plus contexts, when organisms plus environments, or genes plus whatever they need, no longer sustain the overflowing richness of biological knowledges, if ever they did? (Haraway, 2016, p. 30)

Universities need to update their own understanding of who we are as a community of inter-related co-evolving beings and recognise that we are part of rather than apart from nature, that our own wellbeing is deeply entangled with the wellbeing of the wider ecological communities that support us. This involves recognising the planetary ontology of being (Johnson, 2021), that we inter-are with nature (Hanh, 2021), are intra-connected (Siegel, 2022) and need to be afforded opportunities to encounter nature and fall in love with it again, thereby rediscovering biophilia (Cousquer, 2022). Any move towards interbeing and intraconnection involves the nurturing of and teaching for vertical literacy. If universities are to rekindle the flame of learning, they need to take responsibility for reimagining themselves and develop their own vertical literacy:

The lack of *vertical literacy* is the main problem in our universities and schools today. Talk to experienced CEOs and CPOs (chief people officers) of major companies and ask them what they need. They commonly say: people, teams, and leaders that can make our organization thrive in a world of VUCA (volatility, uncertainty, complexity, ambiguity). By that, I believe they mean people and capacities that can take their organization into the 4.0 world in which they respond to disruption by co-sensing and co-shaping the future. Then go to universities and talk to faculty and deans of management and engineering schools. Many, maybe most, are rather illiterate when it comes to vertical development. They think mostly in terms of horizontal development—for example, about adding another skill here or another app or course there. They do not think in terms of upgrading the entire educational Operating System—of our students, our learners, and our societal systems (Scharmer, 2018, para 9).

What might this upgrade for greater vertical literacy consist of? There are no ready-made answers; universities need to explore how teaching and research can partner with and be informed by the life-sustaining future we need. Currently, we are teaching for a society that has become increasingly anthropocentric and egocentric, that is to say disconnected from the living and therefore the real world; and doing so without challenging the status quo. Such challenges are possible when we seek to engage with environmental ethics and ways of being in the world that recognise our interdependencies; but this has to be enabled. We are still learning about the world *out there* rather than learning how to co-sense and co-create new worldings through our self, collective and organisational transformation. Much of this is due to the failure of universities to embrace the inner and outer dimensions of learning through dialogical practice, reflexivity,

action research, and awareness-based systems change (Arnold & Schön, 2021; Vervaeke & Mastropietro, 2021). This requires us to appreciate the illusion of object permanence (McGilchrist, 2021) and recognise how our desire for systems to remain stable leads us to resist emergence. The planet is calling to us to enter into “right-relationship” with natural systems and we are failing to listen and undertake the necessary inner work that is needed to recognise that we are pursuing the wrong story (Yunkaporta, 2023). As part of this, we are looking for technological answers to questions we barely understand. Our lack of literacy about how interconnected everything is leads us to ask reductive questions where unchanging humans are bracketed out. We seek to produce more knowledge and neglect the work of transformation that brings us into right relation. Rooted in deep time and systems thinking, Traditional Ecological Knowledge (TEK) recognises that systems break down, undergoing phase shifts during which new dynamic relational sets and systemic orderings emerge. Vertical literacy is therefore needed to allow us to engage with, participate in, and contribute to this process.

Integrating our multiple intelligences involves embodied practice: the concomitant development of deep listening, somatic awareness, and emotional literacy, equipping us to develop both self-reflexive and self-transforming knowledge. Universities could facilitate this learning at the first person (individual) and second person (group) level; they could also open to and engage with this themselves, encouraging students to study how they themselves can change the institutions and society they are part of. Awareness of this shift in pedagogy is reflected in Learning for Sustainability guidance (QAA and Advance HE, 2021).

The guidance challenges universities to engage with the sustainability challenges in a comprehensive way, involving students, staff (academic and professional services), and the wider community. This can lead to all parties:

... questioning their own and societies’ ways of thinking, ways of practicing and ways of being, which is central to a transformational learning experience. This can be unsettling at first, but is the start of a transformative journey that can lead to a more sustainable future. (QAA and Advance HE, 2021, p. 20)

We now find ourselves challenged to translate this agenda for change into meaningful action that bridges the knowledge-doing gap. In the next section, we consider biodiversity loss as a crisis university students care passionately about and wish to address.

Biodiversity Loss and 30x30

There is indisputable evidence that biodiversity is in dire trouble and the sixth mass extinction is upon us (Ceballos et al., 2015). The recent UN Environment Report (UNEP, 2021) recognises biodiversity loss, together with climate change and pollution, as one of “three planetary crises” that are reinforcing one another

and driving ongoing damage to our environment and health. Leclère et al. (2020) recognise the need to place more land under conservation management and to make our global food system(s) more sustainable if we are to promote the recovery of terrestrial biodiversity. Their analysis of a series of scenarios highlighted the need to be bold:

Increased conservation efforts ... was the only single-action scenario that led, on average across the ensemble, to both a peak in future biodiversity losses before the last quarter of the twenty-first century ... and large reductions in future losses. (Leclère et al., 2020, p. 553)

It is analyses such as these that have led to global recognition of the need to protect 30% of land mass by 2030 (the 30x30 biodiversity challenge)².

We have known for over six decades that we have been facing a silent spring (Carson, 1962/2000; Oreske, 2022; Werner & Hitzfield, 2012). Unfortunately, that knowledge has not translated into a comprehensive transformation of our relational practices: We may know things conceptually, but we don't behave as if we are interdependent with nature.

Heeding Carson's call for us to learn to live in harmony with nature and the UN's call for humanity to make peace with nature will challenge us to shift our listening to a deeper level and to recognise deeper truths (Rodriguez Carreon & Vozniak, 2021). Will universities take responsibility for breaking the illusion of separation that could be the key to ending and restoring the split between mind and body, self and other, human and nature? Will they take responsibility for ensuring students are sufficiently self-aware and resilient to protect themselves from "being overwhelmed by the nihilism and hopelessness of the current dramatic situation while promoting effective skills acquisition and values of connectedness between humans and nature" (Ruiz-Mallén & Heras, 2020)? This remains to be seen. What is clear is that to know this cognitively is not enough, we must experience and feel it, experientially and somatically, if we are to shift the current paradigm of Western thinking. According to Rodriguez-Carreón and Vozniak (2021) "failing to recognize the illusion creates conflict and disturbs inner peace" (pp. 46–47). The health and inner peace of our students is thus inextricably entangled with opportunities to encounter and care for nature. Opportunities to discover and care for nature can allow universities to balance

²The Montreal-Kunming Agreement agreed by more than 190 countries in 2022, as part of the UN Convention on Biological Diversity, establishes a Global Biodiversity Framework, including a global target to conserve at least 30% of lands, inland waters, and oceans worldwide. This work must be carried out in a way that respects the rights and knowledge of Indigenous peoples and local communities, and recognises their leadership.

both the restorative effects of connecting with nature (Ha & Kim, 2021; Scholl & Guwaldi, 2018) with the many benefits of contributing to nature restoration.

University of Edinburgh Climate and Biodiversity Strategies

The University of Edinburgh is a public research university with charitable status and one of Scotland's four ancient universities having been granted a royal charter in 1582. Since then, it has developed a reputation as one of the top universities in the UK and internationally. In 2023, it was ranked 23rd in the world and 5th in the UK by the Aggregate Ranking of Top Universities.³ This well-deserved reputation hides the ongoing dissatisfaction of students in the quality of teaching and student experience.⁴ This is highlighted here to contrast the disparity between the inner experience and development of the student on one hand, with the emphasis placed on their cognitive development on the other, and to raise questions about what students want and the future they face relative to what they are receiving. These questions are relevant because they also pertain to the extent to which the University's strategies on the climate and other crises have developed a firm foundation rooted in reflexivity and transformation.

In 2003, the university developed an Estates Development Sustainability Strategy, together with an Energy Strategy.⁵ Twenty years on, in anticipation of the 2016–26 Climate Strategy⁶ coming to an end, it engaged in a climate strategy refresh, highlighting the extent to which climate change continues to be prioritised over other planetary crises. It was only in 2012 that the university developed a Biodiversity Policy, which made nine commitments (Table 1), specifying the need to develop an implementation plan⁷.

The policy's commitments clearly identified a direction of travel, but how to deliver on these commitments—particularly with regards to bridging practical and academic activities—remained unexplored as reflected by the next steps specified in the policy:

The next steps will include developing an implementation plan that will embed awareness and learning of biodiversity throughout the University. This will enhance partnerships throughout the

³ <https://research.unsw.edu.au/artu/>

⁴ The 2023 figures (Complete University Guide) show that while Edinburgh has maintained its overall place as 12th best university in the UK, its student satisfaction ratings dropped to 74 per cent, placing it 121st for student satisfaction out of 128 universities ranked.

⁵ <https://www.ed.ac.uk/sustainability/governance-publications-reports>

⁶ https://www.ed.ac.uk/files/atoms/files/web_view_-_climate_strategy_2016-2026_spreads.pdf

⁷ https://www.ed.ac.uk/files/atoms/files/biodiversity_policy_2012.pdf

University, and with the wider community, encouraging a cross-disciplinary and strategic approach moving forward. (University of Edinburgh, 2012)

In 2022, a comprehensive biodiversity policy was published, laying out aims and commitments for promoting biodiversity on the landholdings the university is responsible for: its campuses. This was described as a Biodiversity Plan⁸ (University of Edinburgh, 2022).

<p>For the University of Edinburgh, actively managing biodiversity means:</p> <ol style="list-style-type: none"> 1. Developing and maintaining an up-to-date list of species and habitats through the continued commissioning and periodic review of biodiversity surveys of key land holdings. 2. Conserving and enhancing existing, and creating new, habitats. 3. Maintaining excellent grounds management practices by Landscape staff and contractors. 4. Keeping ecological enhancement opportunities at the forefront of decision making relating to major refurbishments and new capital project investments. 5. Meeting or exceeding the requirements of legislation regarding biodiversity. 6. Enhancing staff, students and the local community involvement in biodiversity issues where appropriate. 7. Continuing to promote healthy living and well-being through use of outdoor amenity areas. 8. Seeking funding and grants to facilitate our biodiversity aims. 9. Developing relations with neighbours and interested parties and sharing knowledge and resources relating to biodiversity.
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Table 1. Biodiversity commitments made by the University under the 2012 policy

The Biodiversity Plan aligns with an internal, unpublished biodiversity strategy that prioritises actions within a whole institution approach that includes consideration of research, learning and teaching, operations, investments and partnership working. It focuses these actions around three pillars: geodiversity/ecological communities, species and biophilia, and place-making. The reluctance to publish the strategy, developed in collaboration with university academics and external conservation organisations, arguably reveals a conservatism that is in tension with academic innovation and boundary-pushing. The strategy is much more comprehensive and progressive than the grounds-based Biodiversity Plan, requiring significant institutional change over time. This raises questions about how we build architectures including communities of inquiry and practice where transformative change can safely be prototyped

⁸ <https://www.ed.ac.uk/c/biodiversity-plan-2022>

(Scharmer, 2016). It is to this collaborative approach that we now turn to present how a concern for campus biodiversity can serve as a vehicle for prototyping new relationships and a more integrated ecological approach.

Campuses and Campus Biodiversity

Voltaire, in concluding *Candide*, reflected on the devastating 1755 Lisbon Earthquake, perhaps the first modern disaster, declaring that the answer to such devastation was not optimism (and perhaps blind faith) in reason, science, and technology but to cultivate one's own garden (Dynes, 2000, pp. 110–111). This could be one of the first and best encouragements to return to the soil and local communities that sustain us in the modern era. For a university, this return to the soil, this move from thinking globally to acting locally, involves refocussing on campuses and campus communities. This involves moving from mission statements, policies, and plans, to examining the values and deeper assumptions that form the deepest level of culture (Holt & Antony, 2000, p.145). It involves nurturing a greater learning ecosystem (Scholl & Guwaldi, 2018), getting out of the office and the classroom and seeing, sensing, and presencing⁹ what is and is not thriving. It also involves an exploration of, and investment in, the value of not just green but biodiversity-rich spaces and the wellbeing of staff and students (Ha & Kim, 2021). Liu et al. (2021) highlighted that, whilst university campuses provide unique opportunities for urban biodiversity research, conservation, and education, and can connect the public with nature through citizen science, and whilst at least 300 universities have conducted campus biodiversity surveys since 1940, most of these were concentrated in India and China. This raises important questions about whether UK universities are making the most of their campuses and the latent potential to care both for nature and humanity. One significant development that has allowed UK universities to engage with these questions has been the development of the Hedgehog Friendly Campus (HFC) scheme.

Hedgehog Friendly Campus Initiative

The HFC Campaign, launched in 2019 with funding from the British Hedgehog Preservation Society (BHPS) and support from the National Union for Students (NUS), raises awareness on higher education campuses across the UK of the need to protect this vulnerable species.¹⁰ This initiative engages organisations with significant land holdings who are also able to integrate research, teaching, and learning for change into a participatory action-oriented programme designed

⁹ Seeing, sensing and presencing are the three levels of listening described by Otto Scharmer in *Theory U* (Scharmer, 2016) allowing dialogical connection to be established.

¹⁰ Hedgehogs were added to the UK Biodiversity Action Plan in 2007 and, in 2020, were listed by the IUCN Red List as vulnerable in Great Britain (Matthews & Harrower, 2020).

to address the threats that hedgehogs face. Across the UK, hedgehog numbers have halved since 2000, with urban hedgehogs facing the challenges of road traffic, litter, lack of access to water and food, habitat fragmentation, and poisoning. These issues can all be studied and addressed on campus as universities work their way through the tiered series of bronze, silver, gold, and platinum accreditations that make up the campaign. Each accreditation requires university campus teams to complete a series of actions. The initiative has been taken up by a large number of universities, prompting Moosavi (2021) to comment on how successful the take up of this initiative has been relative to the take up of the Race Equality Charter:

As of June 2021, 17 UK universities hold an award from the Race Equality Charter, 63 UK universities hold an award from the Hedgehog Friendly Campus initiative and 102 hold an award from Athena Swan. No UK universities hold a gold award for any of the three initiatives which is indicative of the fact that no UK universities have achieved racial equality, gender equality or hedgehog protection to the extent that is desired. (pp. 2–3)

This statement highlights that, sometimes, university communities need an opportunity to engage with an issue and an appealing cause around which to gather a collection of interested and committed people. This has certainly been the experience of the HFC team at the University of Edinburgh, whose campuses provide a home for many plant and animal species, including hedgehogs. The University joined the campaign as an early adopter in 2019. Over a three-year period, staff and students across the University worked together to achieve bronze, silver, and gold accreditation thereby becoming a more hedgehog friendly campus. This provided impetus to actions already being undertaken for wildlife including the provision of logpiles and plantings to encourage insects as food for hedgehogs, holding workshops to make hedgehog “homes” and locating them on the University grounds, using strimmer stickers to remind landscaping staff to look for hedgehogs before strimming, creating litter picking stations, organising regular litter picks, and installing signage to slow traffic for hedgehogs.

A progression from awareness raising at bronze level, to significant actions on the ground at silver level, and then embedding and sustainability of continued actions as well as wider engagement with local and regionally based communities at gold level, became apparent as the team worked through accreditations. By 2022, the HFC team widened their membership and remit to become the University of Edinburgh Biodiversity Working Group (BWG), an expansion that supported more fully the biodiversity strategy with its wider priorities.

The University has now committed to pursuing the HFC Platinum award, following the University of Keele (2023). This requires the University to deliver a project that protects and supports hedgehog populations on campuses. The project must:

- Address your university or local area's most negative impacts and biggest threats to hedgehogs

- Have at least two outcomes that can be measured (or reasonably estimated)
- Leave a lasting legacy beyond the end of the project, so the project can continue to have an impact in the future
- Be replicable by other teams in the future
- Have reached a broader audience than just the HFC team

In considering how to engage with this further action-oriented challenge, the BWG decided to build on research to assess and improve hedgerows at one campus site (Norris, 2022). This project reviewed the literature on hedgerows and hedgehogs, undertook a historical review of the degradation of hedgerows on campus, and carried out survey work to evaluate the current health of hedgerows and the implications for hedgehogs (Figure 1).

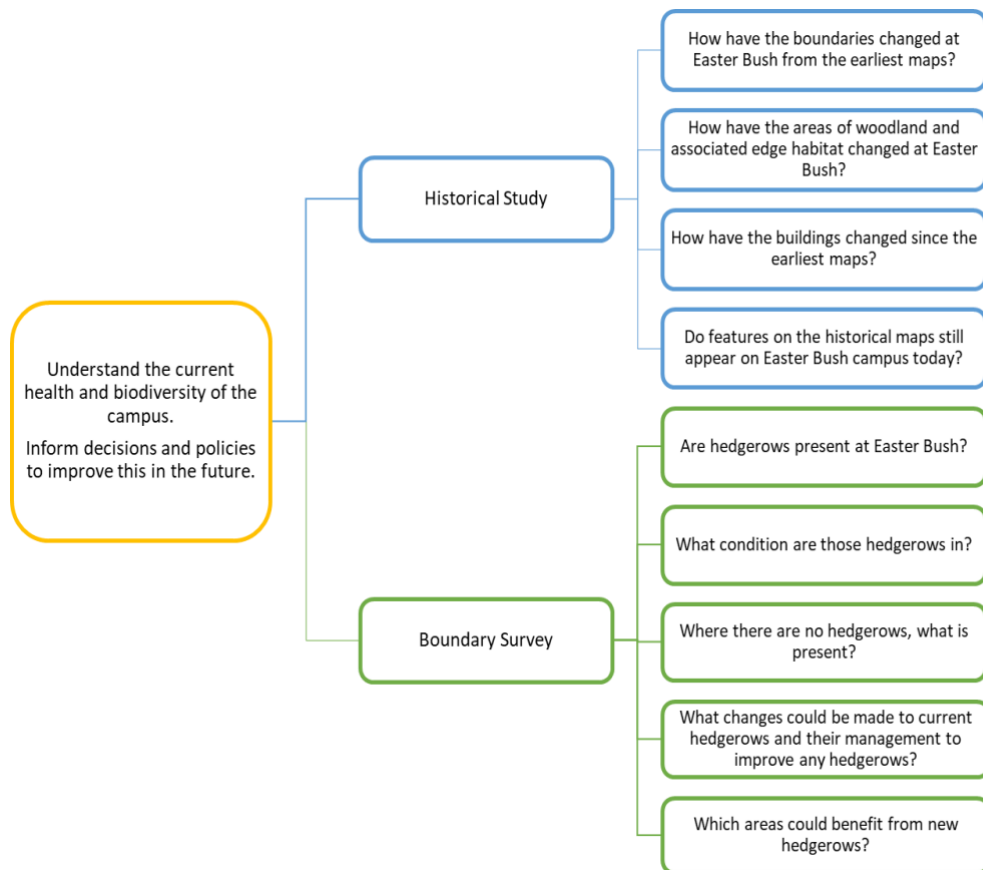


Figure 1. This flow diagram depicts the questions posed by Norris (2022) exploring the history, presence, and quality of hedgerows on the Easter Bush Campus, University of Edinburgh, Scotland.

This project allowed us recommendations on how the University could better care for hedgehog habitats. These recommendations have since informed the development of an approach that could be applied across campuses. Elements

relevant to our exploration of university responsibilities are considered in the next section on hedgerows and hedgerows.

Life on the Edge: Hedgehogs and Hedgerows

Hedgerows have long been part of the British countryside, both as a cultural landscape and as connecting lifelines supporting biodiversity, including 83 Biodiversity Action Plan species in Scotland (Wolton, 2009). Loss of hedgerows or declines in their quality are likely to significantly impact these species, including the Western European Hedgehog (*Erinaceus europaeus*). Hedgehogs are a highly valuable indicator species widely regarded as a charismatic flagship species, protecting biodiversity in urban areas and fostering public participation in wildlife conservation (Hobbs & White, 2016).

Hedgehogs require resources for food, nesting, shelter and dispersal that are typically and reliably supplied by hedgerows. The literature highlights that increasing the quality and quantity of hedgerows increases habitat and resources for hedgehogs and other endangered species as declining hedgehog numbers have a temporal correlation with a loss of hedgerow quality and quantity. Lawton et al. (2010), in their ground-breaking review of England's ecological network, highlighted the need for a changing approach to conservation—a leap forward that went beyond protecting what was left towards restoration and a system's view with respect to ecological processes and ecosystems services for both wildlife and people. It is this concern for the quality of habitat on campus, coupled with a recognition of the need for a systems approach, that informed the development of the case-study presented next.

Case Study

In mapping out the nested relationships between the global biodiversity crisis and what actually happens on university campuses as we seek to prepare the next generation to care for life in a time of global ecological crisis, we have argued that universities need to take responsibility for how we connect with nature and care for nature's interconnectedness. This paper continues to explore these responsibilities by reviewing the Action Research informed project that sought to develop Hedgehog Friendly Campuses. Our broad question is:

How can universities nurture biodiversity and our relationship with biodiversity through campus-based living lab initiatives and communities of learning for and with nature?

We explore this by considering how the HFC initiative provides a focusing device through which, with the help of ecologists who understand hedgehog ecology, we can develop a deeper understanding of how we foster and care for the biodiversity that our campuses can support. We further consider how this initiative provides an opportunity to engage the wider community in conservation work, thereby nurturing our sense of connection to and our relationship with biodiversity. In moving through the award scheme and in

seeking to engage with the question of what it might mean to be a hedgehog and biodiversity friendly campus, we seek to develop recommendations to increase biodiversity on the Easter Bush campus in line with the UoE Biodiversity Plan and HFC aims. This is achieved by developing a framework for stakeholders to gain an overview of, and better understand, the benefits of providing good quality habitat and wildlife corridors. A key part of that framework involves undertaking fieldwork that can inform decision-making and the development of policies that will enhance biodiversity. Such work can be undertaken, in part, through student-led research projects.

Methodology and Methods

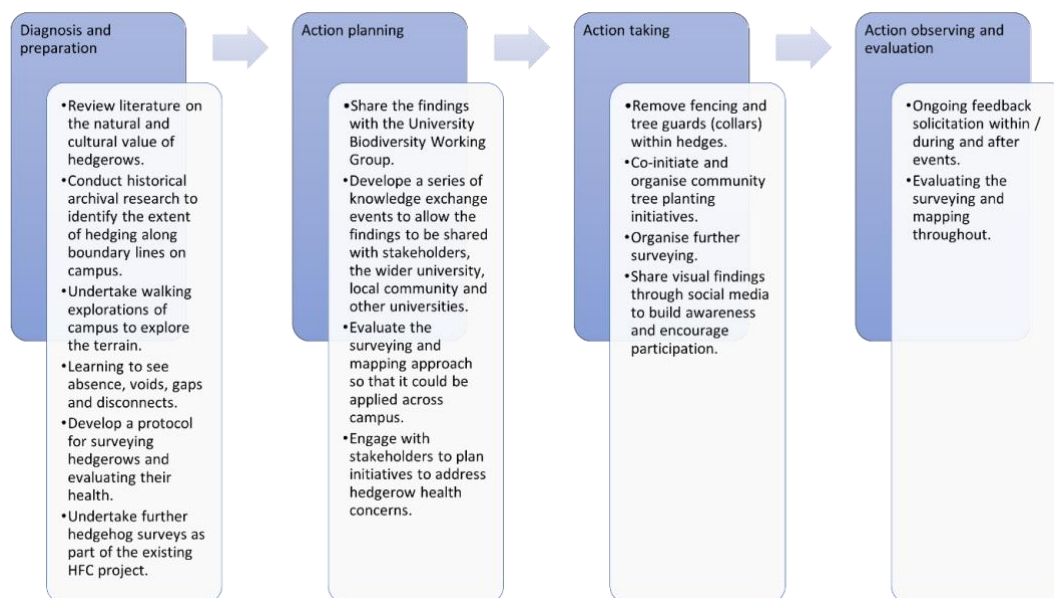
Case-study methodology has become one of the most common qualitative approaches in research on sustainability in Higher Education (HE) as it can be particularly well suited for complex situations with multiple relationships and unclear boundaries (Corcoran et al., 2004). In this case, our HFC project has grown organically as opportunities have arisen for research to be undertaken, knowledge and experience exchanged, lessons reviewed iteratively, and insights drawn on to develop environmental management decisions on campus. The case we present is delimited by the work undertaken for the HFC Bronze, Silver, Gold, and Platinum Awards. This work involved working across departmental boundaries, building relationships with partners¹¹ drawn to contribute to the project from across the university, including hedgehogs who affect and are affected by changes to the habitat and can be considered stakeholders (Smart, 2022).

The tradition of Action Research (AR) represents a shift in social-science research toward active participation in the process of change (Reason & Bradbury, 2001; Reason & Torbert, 2001). This involves the development of a co-creative methodology with an emphasis on co-constructing the new through ongoing cycles of reflection on action. The important contribution that an AR approach can make within the corporate responsibility sector is emphasised by Becker-Ritterspach et al. (2019), who recommend it as a research approach that aids the real-life development and implementation of corporate environmental responsibility responses. They apply the concept of institutional voids to the environmental context, defining these voids as “the absence or weakness and incoherence of formal and informal institutions geared toward environmental protection” (Becker-Ritterspach et al., 2019, p. 185). Scharmer (2016) has articulated such absencing as the ecological divide and proposed Theory U as an

¹¹ The partnering stakeholders are creatures, people, groups of people and organisations identified as having an interest at Easter Bush. These include members of the Land and Estates team, undergraduate teaching teams, Centre for Sports and Exercise staff and the wider student body.

Action Research approach that can allow such divides to be bridged dialogically, through deep listening. Cousquer and Haouti (2022) demonstrated the potential for AR to be undertaken not just for but with other-than-human animals. Such approaches to response-ability (Haraway, 2016) require us to invest in building an organisation's capacity to listen and participate (Bradbury, 2006, pp. 236–237) and to bridge, fill, or compensate for these voids (Becker-Ritterspach et al., 2019, p. 191). So how did this inform the architectural development of our AR HFC approach? What spaces and opportunities did we create to bridge the gaps and disconnects? To understand this, we need to consider the nature of AR in more detail.

Action Research can be viewed as a multi-step process involving some or all of the following elements: diagnosing and preparation, action planning, action taking and action observing and evaluating (Battaglia et al., 2015; Dick, 2015). Our starting point was suggested by an observation made by Norris (2022) who, returning to the University's Easter Bush¹² campus several years after graduating, was shocked by the loss of hedgerows. This prompted a series of discussions that led to the formulation of Norris's dissertation research question about the health of campus hedgerows and hedgehog populations. The approach is summarised using four elements (Figure 2).



¹² The Easter Bush campus is a rural campus, situated outside of the City of Edinburgh, comprising of teaching and research facilities, a working sheep farm, and equine paddocks. It is bordered by land owned and managed by the Scottish Rural College; this means there is significant potential for biodiversity to be nurtured collaboratively by these two HE institutions should they decide to prioritise and collaborate on this.

Figure 2. The multi-step process involved with developing Action Research for the hedgehogs and hedgerows on Easter Bush Campus. Hedgerow health evaluation protocols were trialled and evaluated as part of early action planning and taking, reflecting the iterative nature of the process which is not as linear as this representation suggests.

The mapping of hedgerow losses and hedgerow health that followed the extensive literature review (Norris, 2022) presented the case for the crucial importance of hedgerows as habitats and wildlife corridors. The findings from the archival and survey work were then shared with the BWG. Follow up meetings with land managers were undertaken to review and discuss findings and develop suggestions for interventions. The implications of the findings, and how translating knowledge into action, both in terms of practice and policy, are considered next. In this consideration, we highlight the relationship between disconnections within and across organisations and habitat fragmentation.

Findings and Implications for Environmental Management and Vertical Literacy in Higher Education

In this section, we summarise key findings and recommendations from the HFC study and how these are being acted upon through the Action Taking and Evaluating phases that followed the initial study. This allows us to discuss the implications for how universities can evolve their understanding of their responsibilities in the face of the nature emergency.

Perhaps the most striking historical finding was that the university has little data and no studies on campus habitat cover and biodiversity (Norris, 2022). In the absence of such studies Norris relied on official maps to generate a picture of historical changes to boundary lines that could act as wildlife corridors, reporting that:

- Between 1890 and 2021, the building area cover increased by 2604%.
- The biggest change was between 1890 and 1970, when an increase from 13003m² to 41607m² was seen.
- Between 1970 and 2021 the length of edge habitat¹³ decreased by 12.7%.
- The total length of boundaries increased by 24.8% between 1890 and 2021, with the biggest changes noted where fencing has been introduced to create demarcated areas for horse grazing

¹³ Edge habitats represent the boundary or connection between two different habitats and may contain features of both. This can result in a more diverse ecological niche and allow for greater biodiversity.

without the benefits a hedged boundary can afford horses and wildlife.

The boundary study reported that:

- Of the 6619m of boundaries surveyed, only 1321m (20%) were deemed permeable to hedgehogs.
- 4145m (62.6%) was possibly permeable to hedgehogs, depending on the size of the holes and gaps in the fence.
- The use of chicken wire fences rendered 1153m (17.4%) of boundaries impermeable to hedgehogs.

Wooden fence lines predominated due to their cheapness, longevity, and convenience, requiring little maintenance and providing instantaneous stock-proof barriers. The resulting lack of vegetation, together with the large amount of impermeable surface and presence of artificial lighting (Figure 3) highlights the extent to which boundaries have been constructed with a view to controlling, protecting, and dividing. Little importance has been given to their potential as a means of connecting and sheltering. This reflects an anthropocentric approach to decision making that spares little thought for biodiversity. There is minimal quality habitat for wildlife, particularly hedge-dwelling species, with no connectivity or cover across these large open areas. Furthermore, the large areas of impermeable surfaces and artificial lighting are known to negatively affect hedgehogs (Berger et al., 2020). Where present, hedgerows were found to be in fair to poor condition with limited tree-species diversity. Increasing the number of quality hedgerows and consideration for placement and timing of artificial lighting could significantly help hedgehogs access these areas, with benefits rippling out.



Figure 3. Sparse vegetative growth across the horse paddocks looking south-east.

The lack of hedgerows and trees across this area can be seen clearly. This contributes to horses becoming easily and regularly spooked by the wind and litter blowing. The path is a solid surface with artificial lighting.

The report concluded that conserving and regenerating existing hedgerows and planting of new hedgerows would benefit hedgehogs, other wildlife, livestock, and the wellbeing of people (Norris, 2022). Over-trimmed hedges would benefit from a change in management to allow for blossoming and fruiting and increase base density. This may involve laying sections (Graham et al., 2018) and filling in gaps with new planting. In some locations lines of trees could be integrated into an enhanced connectivity network by planting new hedgerows. Veteran trees, where present, could thus be incorporated into dense well managed hedgerows, further contributing to the provision of connected habitat.

The recommendations now form the basis of the University's HFC Platinum Award project, which has focused attention on hedgerows as an essential habitat for hedgehogs. This led to a preliminary mapping exercise with student and staff volunteers, facilitated by members of the BWG, using the University's Green Infrastructure (GI) mapping tool, to add detail in terms of hedgerow characteristics to hedgerows identified and visible on the tool. SRS has employed a member of Estates to work one day a week to progress the Platinum Award project and GI mapping over an eight-month period.

Mapping has allowed a more comprehensive survey of campus hedgerows to be undertaken, establishing their health status, capturing valuable data centrally, so that priority hedgerows, and their locations, can be identified for improvement. Mapping shows clearly to Estates where campus and adjacent land managed by farmers would benefit from additional hedgerows or improved hedgerow care. This includes removing wire mesh fencing from hedgerows and tree guards, as well as the laying of dead hedges. Integrating all the elements of sustainable wildlife hedgerows is likely to have a substantial impact on local biodiversity and help hedgehog conservation, creating opportunities for integrating volunteering, research, and teaching. This, however, will challenge the university to consider the underlying fragmentation and how it has arisen through institutional fragmentation and loss of vertical literacy.

With future building works planned, opportunities exist to study how the university mitigates effects on the local wildlife populations and community wellbeing. This requires the fragmented nature of records and thinking to be addressed, and the establishment of baselines to capture the existing condition of hedgerows and other habitats with a view to realising biodiversity net gain. More importantly, it recognises that we have a shared wellbeing. Hedgerows with tree-guards in place, causing an increase in height of the base of the hedge that is likely to be detrimental to hedgehogs, who favour hedges with dense bases, particularly for nesting, represent a learning opportunity for students who can reflect on the lack of integrated care plans more widely. This opportunity to contribute to a shift from management to stewardship, from control to care, thus

extends beyond the removal of collars, viewing the hedgerow as a source of food, shelter, happiness, and wellbeing. The hedge is thus a metaphor for education.

Discussion of the Bigger Picture

This paper set out to consider how universities might evolve their understanding of their responsibilities in light of the biodiversity crisis and the need to restore 30% of land for nature by 2030. This responsibility has been largely overlooked by the literature on corporate responsibility in the Higher Education sector, which fails to recognise the extent to which corporations “are largely responsible for the most serious problems in the world today, in particular, the climate emergency” (Lapadat, 2022, p. 184). Rahman et al. (2019) argued that “universities have a broader responsibility beyond teaching and research, a larger mission in human and social development to be socially responsible to local communities by strengthening relationships with and between constituents” (p. 916). The concept of the public good that they present, however, is very anthropocentric and fails to recognise the disconnection between humans and nature that lies at the heart of the climate and biodiversity crises (Siegel, 2022). This reflects a narrow and therefore limited understanding of the nature of social responsibility (Rahman et al. 2019, p. 926) and a lack of detailed consideration of the role played by universities in ensuring sustainable futures. Any critique of how we frame our understanding of responsibilities is inevitably challenged to become more self-aware and self-critical. This calls for an understanding of responsibilities that are born of reflexivity—turning the camera back on ourselves—and an ability to appreciate how organisational culture, values, and thinking create the crises in which we find ourselves entangled. As Jonathan Rowson (2021), writes of the metacrisis:

How we understand and react to our crisis is an *endogenous* part of our crisis and our emergency, and at a species-as-a-whole level, at a political level, at a business level, we don’t understand it very well at all.

All our rallying cries for action and for transformation arise in cultures and psyches riddled with confusion and immunities to change. We have to better understand *who* and what we are, individually and collectively, in order to be able to fundamentally change how we act. That conundrum is what is now widely called the meta-crisis lying within, between and beyond the emergency and the crisis. That aspect of our predicament is socio-emotional, educational, epistemic and spiritual in nature; it is the most subtle in its effects but is the roots of our problems, and the place where we are most likely to find enduring political hope. (p. 29)

In examining how universities might engage with the biodiversity crisis, in characterising this as a “thorny challenge” that is difficult to embrace and take to heart, we highlight that the sterile and lifeless boundaries we create on the

land are mirrored at an organisational level, reflecting both literally and metaphorically how our linear thinking, boundary making, and siloed disciplinary practices lie at the root of the problem. To better understand this connection, we need to see the whole in the part (Bortoft, 1996) and then consider how parts might be different if universities attended to and operated from the whole.

The HFC initiative provides a focussing device through which we have been able to develop a deeper understanding of how we care for the biodiversity that our campuses can and could support and how we can engage staff and students in conservation work, thereby nurturing their sense of connection to and relationship with biodiversity. This has helped stakeholders gain an overview of, and better understand, the benefits of providing good quality wildlife corridors.

The lack of research into campus biodiversity means that we have no baselines to make comparisons with and little awareness of biodiversity potential. The resulting shifting baseline syndrome (Jones et al., 2020) is therefore part of the system the university needs to develop an overview of. University staff and students have minimal, if any, lived experience of living in a healthy ecosystem and what we have lost. This lack of awareness is further compounded by the lack of academic engagement with the history, sociology, and ecology of university campuses which has left the university community with little knowledge of the health of campus ecosystems. This creates an opportunity for universities to re-examine their responsibilities and specifically how they can nurture both biodiversity and our relationship with biodiversity through campus-based living lab initiatives and communities of learning for and with nature.

This paper's ground-up approach sought to initiate this through a series of action-learning cycles. In doing so, insights have been gained into habitat fragmentation, the challenges associated with habitat restoration and the wider challenges of "getting the system into the room" and bringing the university into right-relation with nature. By highlighting the absence of records and knowledge of campus biodiversity and of how the university hedgerows and campuses have been managed, the historical lack of management for and with biodiversity and the impacts of management practices on campus life, both human and more-than-human come into view. The whole we see in the part that is the HFC project is of a research and teaching organisation that does not study its own relationship to place. Estates are managed for profit, rather than being stewarded for life and for the opportunities to learn how life-sustaining systems can be cared for. There is thus only minimal recognition of place as a living system we inhabit and are all responsible for.

We start to see the effects of hierarchical organisational cultures and disciplined thinking: Each department and discipline may have its partial truths but these do not come into conversation as the quality of listening practice necessary to dissolve silo-thinking is not prioritised. In seeing the whole in the part (Bortoft, 1996), however, we come to appreciate that the ways of attending that characterise thinking in academia, with its obsession with measurement

and utility, are designed and destined to fragment and vivisect (McGilchrist, 2021, pp. 900-903). Without an understanding of and respect for the value of hedgerow ecologies that have established themselves over generations, it is all-too-easy for planners to think it is acceptable and equivalent to tear up old hedgerows, and mitigate this by planting saplings. Such simplistic thinking fails to recognise the relational richness that arises over time through complex co-evolutionary processes.

Looking forward, we argue that universities need to nurture ecological and vertical literacy on their campuses and place emphasis on how we respect, value, learn about, research, study and most importantly, steward and care for our environment. This can be achieved by creating spaces and opportunities for our interdependent relationships with campus/local biodiversity to be engaged with by all disciplines. This, however, is not just about sharing data, it is about sharing stories so that the meta-narrative of how we are deeply related to, dependent on, and responsible for nature re-establishes itself. Yunkaporta (in Vaughan-Lee, 2024) argues for us to embrace deep time diligence as part of this, in order to develop the stories, lore and knowledge that we need for the system to become healthy.

Everybody's sharing their different ignorances. Your ignorance is only from the fact that you have a valid data set, but it's only from one standpoint. But you get all the multiple standpoints and you start to form a picture. You've got all these different data points coming back in and it's computed, like you've got dark data processing happening at this big collective level with the best computation mechanism ever—'cause the human brain's pretty good, but you get like twenty, thirty, a hundred and fifty of those brains together, sharing stories, sharing data sets, and then all of these things just kind of moving and shaping together, something emerges: principles, lores, story, narrative binding all these together. (transcript, Tyson Yunkaportas answer to the 13th question)

The potential for collaborative transdisciplinary work to contribute to such projects is there to be realised. The next phase of such work will challenge this and other universities to recognise the intersections between social responsibility and vertical literacy, and to evolve and deepen the approach to Action Research to include awareness-based systems change for ecological and planetary health at the organisational level. Substantial bridging work lies ahead, challenging teaching and research and operational services to reflexively and collaboratively work to address the knowledge-doing gaps that have arguably contributed to the ecological crises we face.

It is hoped that such work will be resourced in ways that ensure future generations can enjoy richer, more ethically informed and sustainable relationships with campus biodiversity. Universities can nurture a relational literacy and sense of place that allows the health of the living environment and

the communities their organisations are embedded in to be safeguarded. The thorny challenge they have to embrace involves bringing communities of learning, inquiry, and practice together to listen and collaborate, to make our campuses liveable again and prepare students for these ecological challenges. The HFC initiative can thus serve as a focussing tool that encourages Higher Education institutions to develop the necessary ecological and vertical literacy required to meet the nature emergency more comprehensively.

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Peer Review Article

Drawing New Relationalities with Migrants and Immobile Exiles

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edge

Abstract

In this paper, we explore how drawing can be used as transformative educational practice in the context of climate change shifting our relationships with the living world. As a starting point, we share our understanding that we are entering times where the relationships with living systems around us are no longer stable and predictable (Morizot, 2023). Some people experience this instability through forced exile and migrant journeys. Others do not travel but become immobile exiles (Morizot, 2023). This context has invited us to start a co-inquiry into relationality through the practice of drawing. We ground this exploration in four examples from our respective work in the fields of systems change, education of the arts and participatory arts-based research. Each of the examples illustrates how small groups of people - both children and adults - can develop awareness of changing relationalities between humans, other living beings and vibrant matter (Bennett, 2010). In the workshops we have facilitated,

the images themselves come alive as quasi-organisms (Simondon, 2022). With a phenomenological gaze, we reflect on their capacity to support the becoming visible of micropolitical agencies with the potential to reconfigure systems towards decisive mutations of plurality (Glissant, 1996).

Keywords

drawing, art-based research, transformative education, systems change, relationality, climate change, migration

Introduction: Climate Change, Exile, Systems Change and Drawing

In this paper, we will begin by sharing our understanding of the context we situate ourselves in, and our approach to systems change and drawing. Then we will share four examples of our explorations of new relationalities in the fields of systems change learning and visual arts education, presenting each through a description of our practice alongside with key concepts we use to inquire into relationality.

Climate Change Exiles Us All, and Calls for New Relationalities

As we write, wildfires sweep across northern America and southern Europe, cyclones swirl in the Pacific, and torrential rain causes floods everywhere. Weather patterns defy us, each season is the hottest on record. As people flee and migrate they become unconsenting shape-shifters in fast-changing landscapes (Baillat, 2018). Baptiste Morizot invites us to consider that we have entered new “mythical times,” where overwhelmingly the relationships with living systems around us are no longer stable and predictable (2023, p. 31).

As people migrate, in numbers much higher than ever before owing to climate change, they become exiled from their places, and end up living in other places which are themselves already tipped into the mythical times of unstable relationships. Millions of migrants meet billions of people Morizot calls immobile exiles (2023, p. 80), who have not physically moved to another country but who have a sense of exile from the familiar in the rapidly shifting relationships with the living systems around them. Through the experience of *solastalgia*, an emotional state produced by the disappearance of the reliable rhythms of the world as we know it, immobile exiles have been offered what Morizot (2023) describes as the dimensions of loss and wandering that exiles have sung (p. 80). Collectively, we all become co-creators of new co-evolving worlds. Founders of new mythologies. Out of promise, out of necessity.

The climate crisis being a crisis of relationship to the world around us, as practitioners we are invited to explore new relationalities for systems change. Climate change is often framed as an objective scientific phenomenon we humans have created and are called to act upon. This is only part of the picture, as the

root causes of climate change can be uncovered through the shift in the nature of our relationship with the rest of the living world. A significant era of this change began in the seventeenth century with the widespread adoption of the Cartesian mindset, which sees Man becoming master and possessor of Nature. This mindset, seeded in Europe, was increasingly imposed across the world through colonial expansion, and supported the development of an extractive dominating relationship with the living world and with people living in kin relationships with their places. It now underpins much of the modern world: our industries, our agricultural model, our speculative finance, our growth-driven economy, our geopolitics. We understand climate change, and the interrelated crises of biodiversity collapse, pollution, increasing migration and rising inequalities to be the result of the exponential development of this mindset that purports an absence of mutual relationality between humans and all other life. Terrellyn Fearn, project director at the Turtle Island Institute, reflects on the climate crisis in these terms: “Many people call it an ecological crisis, but it’s a relational and spiritual crisis as well” (personal communication, 3 July 2023).

We are therefore inevitably working in the context of a world increasingly shaped by the effects of climate change. As systems change practitioners we seek to address root causes of interconnected global challenges, and we feel compelled to explore other patterns of relationship as the deeper tissue of our desirable futures. Our complex world is path-dependent (Boulton et al., 2015) meaning we do not seek to go back to a previous state of relationships, but to explore what is possible from here on out.

We use the term “relationality” because it expresses a quality, a state. It is a processual term, in contrast with “relationship” which designates a thing. Relationality can be understood as simply the condition of being in relationship, however it can also imply the idea of being constituted by relationships with others, in inter-being. This seems crucial to us in the exploration of intra-active (Barad, 2007) potential for systemic change, which is to say that the deeply interconnected nature of people, other living beings, and material things can be a source of agency for change. A qualitative methodology is then necessary to explore relationalities, focusing on the process itself, and looking for outcomes that defy a quantitative noun-based idea of results.

Our working hypothesis is that if we are able to foster the emergence of new relationalities between humans, and between humans and living beings all around us, we can work on a deep level towards supporting the capacity of life to regenerate and survive the critical state we are collectively in right now.

To develop this hypothesis we sometimes work directly with the challenges of forced migration in the context of climate change. For example, this article will describe Camille Courier’s arts-based research with migrant children and adults in France and Canada. However, we also bring awareness of this context to all the other work we do which is not explicitly about climate or exile but which in our view cannot escape these realities. For example, Laura Winn facilitates learning about systems change and regenerative development which develops

capacities to work relationally, without explicitly working on the challenge of migration. We believe that working on new relationalities in any setting is indirect work on these global challenges of climate and exile.

Drawing at the Edge of Learning

We are two author-practitioners writing between educational practices at the edge of the field of systems change and the visual arts. We experience the strength of liquid boundaries between the languages we speak—French and English, the continents we straddle—Europe and North America. In the context of the climate crisis and a rapidly changing world where forced migration and immobile exile are increasing exponentially, we are participating in learning processes in which learners have to discover and design the skills that will be needed in the new milieu they are meeting.

We can summarise the respective practice grounds from which we meet at the edges, as follows. From the perspective of a systems change practitioner, Laura Winn works with visual practice to support professionals in the fields of sustainability and social change to engage with complexity and move through overwhelm to agency. She explores new systemic and regenerative imaginaries that enable us to transcend paradigms. Her translation work bringing regenerative thinking into business contexts, or supervising the adaptation of learning content into both French and English, is a core practice that helps develop heightened awareness of the cultural and linguistic richness of systems change work. Camille Courier is a visual artist, researcher and teacher who works with the singular strengths of traditional and digital drawing mediums, creating large format works, often *in situ*. Artistic experimentation, pedagogy and theoretical reflection are co-generated in her process. Paying close attention to the technical and micropolitical dimensions of visual culture and artistic gestures, she is currently working on collective drawing creation processes, including a participatory project with female and LGBTQI+ exiled visual artists in Montreal, Canada. Her work continues to explore paths opened during her doctoral research (Courier, 2022), through arts-based or creation-based research. Together as co-authors and practitioners, we are exploring how visual practices, in particular drawing, are essential to the emergence of new relationalities in the context of a living changing world impacted by climate change.

Through this paper, we aim to share the way we facilitate learning through drawing and contribute to creating the conditions for new relationalities to be developed. We draw inspiration from researchers who describe mechanisms that support “learning in the arts and highlight ways in which art and creativity can ignite learning in schools, informal learning spaces, and higher education. The focus is on learning in, with, and through the arts” (Knudson et al., 2021). Examining the design of art-infused learning environments, we are testing arts-based teaching practices in a wide range of *milieux*.

How We Approach Systems Change

Drawing on the work of Anna Birney (2015) and co-inquiry in the early stages of the Illuminate network,¹ we approach systems change as simultaneously outcome, process, and practice. From an outcome perspective, we understand systems change as a “new pattern of organisation or system structure” (Birney, 2015, p. 14), or as Birney now says, a “new pattern of *organising*,” as it is not static but about relational doing and being (personal communication, 2020). From a process perspective, we understand systems change to be a continual process of deliberately seeking to create the conditions for change in ways that are systemic. This entails working with patterns to choose nodal interventions, working from potential (Haggard & Mang, 2016) and engaging in continual learning. From a practice perspective, we are particularly interested in exploring visual practices and their role in systems change work focused on relationality.

Our learning approach is informed by action inquiry (Torbert, 2013), and we engage in first, second, and third person inquiry to understand how systemic change processes are contributing to systems change at multiple scales and in multiple relational contexts. First person inquiry invites us to consider our relationship with ourselves. Second person inquiry opens a space to explore collective relationalities with people we inquire with. Third person inquiry stretches our understanding of relationality beyond small groups and direct acquaintances to fields of endeavour we share with other practitioners, and we seek to include relationships with living systems we are nested within and the vibrant matter all around us (Bennett, 2010). In this way we aim to expand beyond the relational practice of systems change that is focused on humans and their power relations (Milligan et al., 2022). Although we wholeheartedly agree with the idea that relationships between people are at the heart of systems change, and addressing human power relations is as necessary as technical approaches, we seek to extend the idea of relationality beyond the human realm, to include all of life and our material surroundings. Milligan et al. (2022) define deep relational work as “a fundamentally different way of being in relationship” (para 10). The assumption in this definition is that relational work is about people, whereas we feel it has the potential to be expanded to include more-than-human agencies, which has implications for practice and invites us to look beyond language-based and conceptual work.

We consider our practice of systems change to be fully embedded in our daily work and life, and grounded in visual approaches and awareness practices that help us see what is changing in complex living spaces. We consider that change can be fractal across individuals—including ourselves—, learning groups, and

¹ Illuminate is an international network for people who are seeking to shift harmful systems towards justice, health and balance” <https://www.illuminatesystems.org/>

whole systems. Therefore, when we are reflecting on what change is being created through a series of workshops, in a learning programme or in a classroom setting, we are interested in what is happening at a micropolitical level (Guattari & Rolnik, 1996) where social practices can be observed within small groups as they engage in collective drawing gestures. We also look at what is changing within ourselves, in our bodies and in our conscious inquiries, as much as the reorganising of stakeholders or macro-scale patterns. Our thinking on multi-scalar systems change draws on the field of sustainability transitions and the practice of multi-level perspective (Geels, 2011) which helps us look at landscape-level context and what is going on in the margins and edges as much as the mainstream flow of work. We draw on the regenerative development concept of nested wholes (Haggard & Mang, 2016) asking how living wholes—from individuals to whole ecologies—are contributing to the evolution of the systems they live within. We also consider the overall ethical political psychology we are working with, following Guattari's approach developed in *Three Ecologies* (2014) which looks at the interrelationships between psychological, social, and environmental spheres.

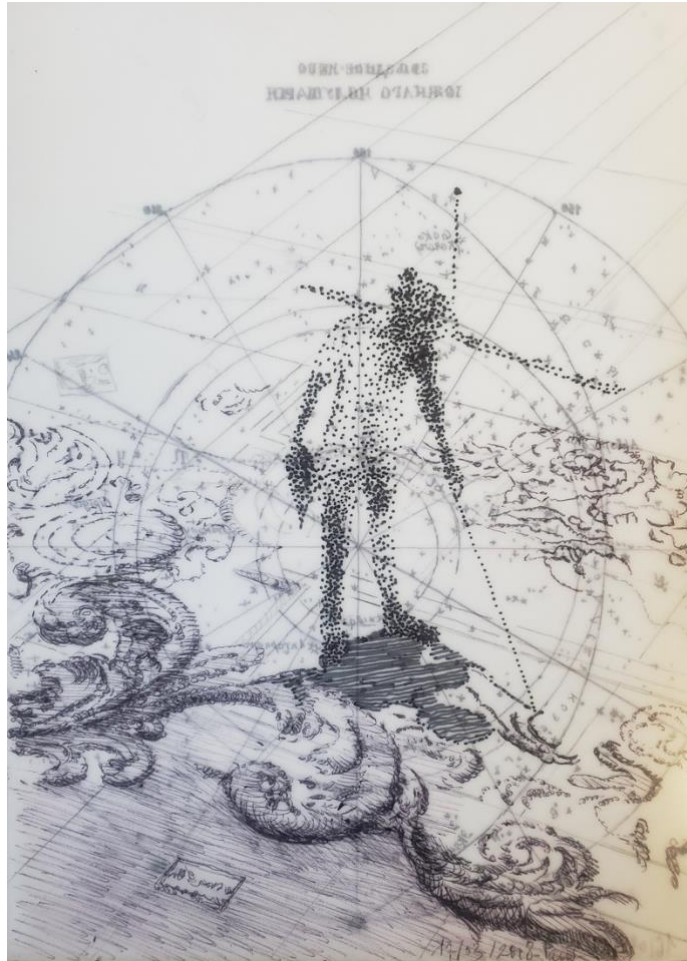


Figure 1. *Dessin-scène*. Ink on paper. (Courier, 2018; Photo by M. Collet).

How We Approach Drawing

Firstly, we approach drawing as a relationship with images. We both draw every day and live and work continually with images that are shaping us: those we have drawn ourselves, those that have been collectively created in our learning contexts, and those made in the world by the non-human agencies around us. Like Gilbert Simondon, we experience these images as “quasi-organisms”:

Images almost seem to be secondary organisms within the thinking being: parasites or a surplus, they are like secondary monads, sometimes inhabiting the subject, other times leaving it. They may prove to be, against a person’s unity, a seed of splitting [dédoublement], but they might also bring their reserve of implicit power and implicit knowledge to moments when problems must be solved (Simondon, 2022, p. 3).

Secondly, we approach drawing as a living process. We design learning processes that use drawing to explore relationality and engage in systems change, working with the inner dynamics of images which we think of as “sheafs of motor tendencies” as Simondon described the first stage of a mental image’s existence, in his theory of the image cycle (2022). In this way, through the practice of drawing we align with living systems by enabling a “process of genesis, comparable in its unfolding to the other genetic processes that the living world shows us” (Simondon, 2022, pp. 3–4).

The anthropologist Tim Ingold illustrates this beautifully when he writes about a line drawn on a page to describe the upward trajectory of salmon movement (Ingold, 2011).



Figure 2. Salmon, making their way up-river towards their spawning grounds. Illustration from prologue to Redrawing Anthropology: Materials, Movements, Lines. (Ingold, 2011).

Ingold invites a reflection on this drawing as a nodal intervention created collectively by the salmon, the movement in the water, the paper, and himself:

To be sure, if you merely look *at* it, there is nothing much to see. You have rather to look *with* it: to relive the movement that, in turn, described the vault of my own observation as I watched the

salmon leap the falls. In this line, movement, observation and description become one. And this unity, I contend, is nothing less than that of life itself. (Ingold, 2011, p. 1)

Here we can see how the practice of drawing is first and foremost collective movement and agency. All of life in its movement is drawing, and through learning processes and drawing processes we are life drawing, relationally becoming.



Figure 3. Tattoo. Ink on paper. (Courier, 2016; Photo by C. Majeau).

Thirdly, we approach drawing as a mode discovery in dialogue with language. The inquiry methodology we have developed is inspired by arts-based research and a heuristic approach following the assertion that “drawing is discovery” (Berger, 1953/2013). The way we write is animated by a constant mutual elaboration and an evident intimacy between writing and drawing, inspired by A/r/tography:

A hybridized term of a/r/t and graphy, which means description. The slashes in a/r/t represent the complex and entangled identity of the inquirer as an artist/researcher/teacher(-practitioner) who is engaged in arts-based living inquiry. (Komatsu & Namai, 2022, p. 3)

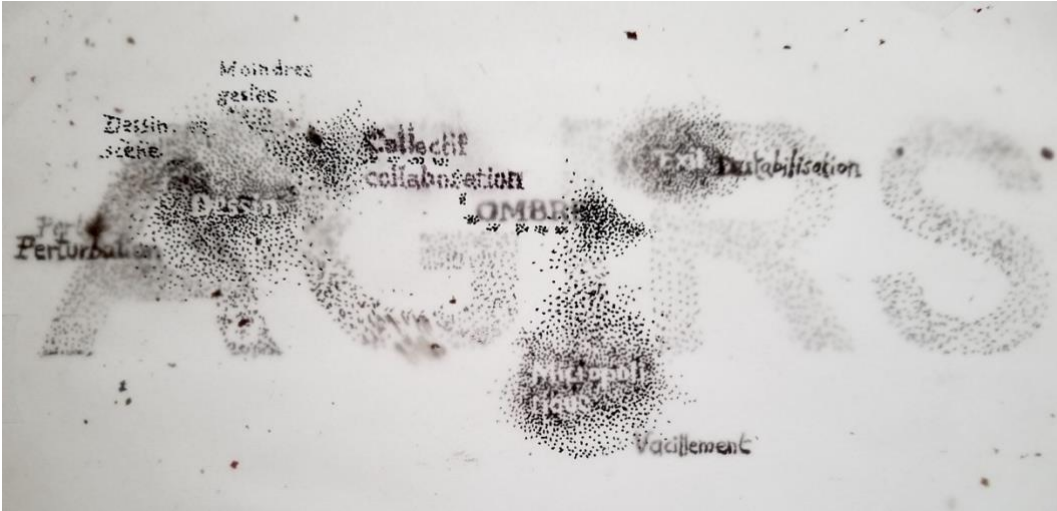


Figure 4. Schéma problématique II. Ink on paper. (Courier, 2020; Photo by M. Collet).

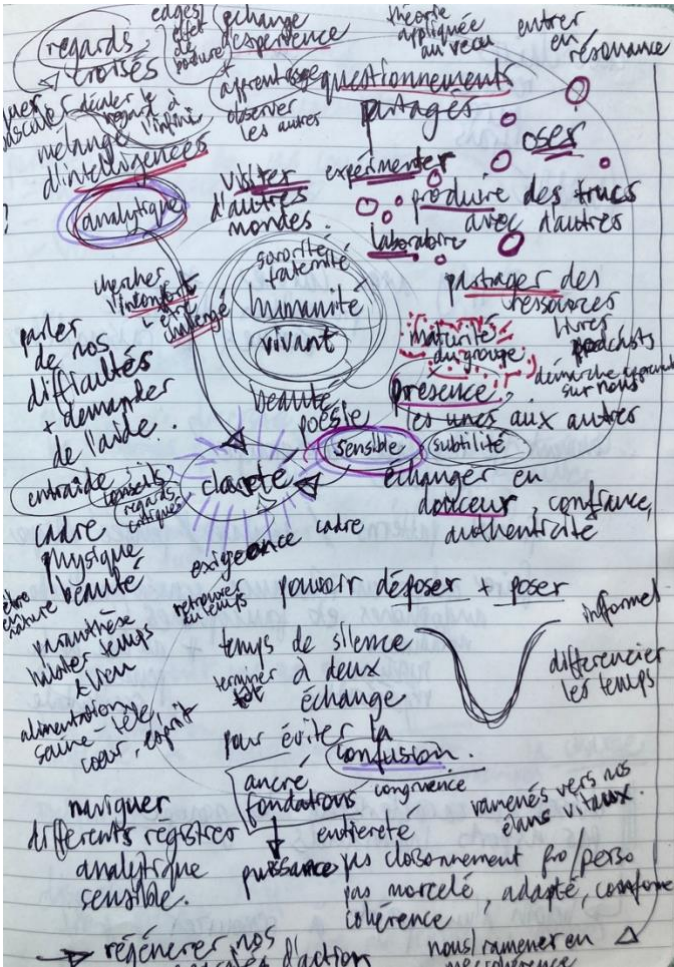


Figure 5. Illustration of A/r/tography, drawing and writing patterns in author's notebook. Pen on paper. (Winn, 2023).

All these different threads and conceptual forces come to life in our respective visual practice in learning contexts and through our ongoing conversations as co-authors. An examination of this practice will constitute the rest of the article.

Practice: From Drawing Systems to Drawing New Relationalities

In this part of the paper we will examine three examples of learning activities involving drawing and trace the evolution of our inquiry.

Drawing Systems: The Starting Point of our Inquiry

Through our shared action inquiry over the last two years, we are realising that visual practices which help us navigate and make sense of complexity are no longer sufficient to shift relationalities in a way that is necessary in the context of climate change and forced exile lived through the phenomena of migration and immobile exile. This awareness of the insufficiency of widely used visual approaches such as systems mapping has emerged through our joint conversations about the connection between drawing and relationality, and our assertion that even if we are not working directly *on* the challenge of climate change and forced exile, this is nonetheless the context we are working *in*.

In my work as systems change learning facilitator and regenerative development practitioner, I (Winn) encourage professionals from different backgrounds and cultural contexts to shift their thinking from a mechanistic and linear paradigm to a living systems paradigm. I use visual approaches like systems mapping to bring attention to the dynamic relationships *between* things rather than to the things themselves. This usually involves quickly scribed systemic frameworks and systems maps in notebooks, on flipcharts, and on online whiteboards in the context of fully digital learning experiences. I find this approach rewarding because it generates insights and can open up new ways of thinking for the participants. At the same time, it often feels like a solely intellectual exercise, and as such an insufficient contribution to the necessary exploration of new relationalities in the context of climate change which is the wider framing of my work.

I have found that when considered through the lens of the agency of the images themselves, as what Simondon calls quasi-organisms (2022), more potential becomes palpable. One example of this arose in a recent exercise in an online course I co-designed and co-facilitated with the School of System Change. I invited groups of changemakers to map the flows in the systems they are working with, by starting with the flows themselves rather than the elements or stakeholders in the system. This exercise was insightful because it was so difficult! Our collective mechanistic paradigm, sourced in Newtonian physics and Cartesian philosophy, encourages us when faced with complexity to focus on things, separate them, categorise them, and look at individual parts in isolation.

The exercise I was proposing involved putting aside this habitual way of thinking to focus primarily not on individual things but on flows. We started by identifying as a whole group some of the flows that are likely to be present in most complex ecological-social-economic systems. These include materials, energy, finances, skills, knowledge, etc. The invitation was then for the smaller working groups to take a key flow and follow it as it travels through the system, encountering entities and system structures along the way.

One group started by mapping the stakeholders first anyway and then looked at the relationships between them, in a more traditional “value mapping” approach.² Their systems map looked impressive and the group received a lot of praise from other participants, but they had a hard time distilling any insights about the relationships they had drawn beyond a more comprehensive description of the problem. Clearly the flows in the map had not come alive for them.

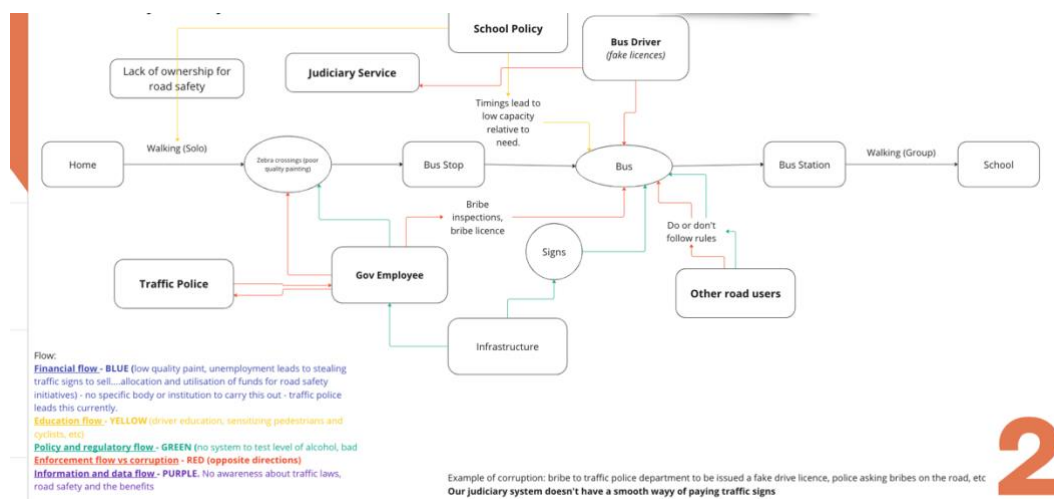


Figure 6. Illustration of group exercise in visual value flow mapping. Diagram presented on online whiteboard. (Oliver Obwana et al., School of System Change, 2023).

The group who got the most out of this exercise managed to connect to the flows in a health system by recognising the flows themselves as active agents rather than passive currencies. They tapped into the potential of the disease itself, of molecules for cures, of knowledge, reputation, and funding to reconfigure the system.

² Climate KIC has developed a methodology and workbook around value network mapping, where elements in the system are mapped first, and then the relationships between them. It can be consulted here: <https://transitionsclub.climate-kic.org/publications/value-network-mapping/>

The co-inquiry with my co-author and the active resonance between visual practices in systems change learning and arts-based research has led to a deeper understanding of what is going on in these learning moments. Our shared gaze on participatory drawing situations is coloured by a creative and “*critical reconfiguration of phenomenology. This reconfiguration sheds light on the social-political possibilities of a movement that might have seemed, on the surface, to be only about description*” (Al-Saji, 2017, p. 143, emphasis added). This seems an accurate representation of the difference between the two drawings produced by the groups in my online course: one was about description and the other created a movement with social-political possibilities towards new relationalities.

Our shared inquiry space brought the visual practice of systems mapping into resonance with another visual practice—participatory drawing—which has been developed to work directly on the experience of exile through the collective elaboration of different relationalities. Whereas systems mapping produces cartographies of intelligible relationalities, other forms of drawing can support us to explore unintelligible³ relationalities, that is, those emerging in a world where our ideologies, our visions for the world, our castles in the sky are starting to crumble to move beyond human nature, goodness, tolerance that are so fugitive, but enter into decisive mutations of plurality accepted as such (Glissant, 1996). The next section of the paper will examine two participatory drawing workshops, illustrating this resonance.

Participatory Drawing as Transformative Education with Children in Primary School

In my work as a visual artist and educator, I [Courier] propose transformative educational relationships embedded within mainstream system contexts (Tuck & Wayne Yang, 2012). Here I will share two examples with different groups, where people collectively experience image as movement (Simondon, 2022), as a migration process and a shared exploration of new relationalities.

The first example takes place in French primary schools, as part of a visual arts and art history programme for children between 6-11 years old. The schools are in Northern Paris where there is a high proportion of migrant children arriving in France for the first time from Afghanistan, Ukraine, Morocco, the Comores, and West African countries like Mali and Sénégal. In France, attending primary school is mandatory for all children. With the increase in migrant children, some schools have been given the means to set up classes for non-French-speaking students run by specialised teachers. The children join all the

³ “Meaning is not a property of individual words or groups of words but an ongoing performance of the world in its differential dance of intelligibility and unintelligibility.” (Barad, 2007, p. 149)

official classes and follow the curriculum with a view to being fully integrated into the French system.

In contrast to many learning contexts, in visual arts practice young children can easily engage in transformative education. The children are not *taught*, based on a classical verbal approach to knowledge, nor asked to express or heal trauma, but they are becoming—through *dividual* (Massumi, 2017) awareness—together. By this, we mean that each child is “set in tensions by a turbulence of heterogeneous tendencies, divided between them in his relation to himself” (Massumi, 2017, p. 1). In contrast to individual awareness, dividual awareness is necessarily relational and collectively produced through the intra-action of complex movements. In this context, a new relationship between affects and politics must be elaborated between the art teacher, the students, the space, and the materials we create images with. If this new relational configuration is made possible, these sessions can embody a parasitic movement at the frontiers of normative relationships. The living images (Simondon, 2022) have the art of accelerating border crossings between conscious and unconscious, individual and collective, opaque and visible. In this indirect way, the new relationality can transcend the structures and norms of migrant integration policies as manifested in the public education system (Haney et al., 2004). The sessions can work on changing relationality at a societal level between migrant children and “immobile exiled” children who following Morizot’s thinking are exiled from their places by the effects of climate change without having undertaken a migratory journey (2023).

I start the cycle of eleven drawing workshops by miming a legend that was invented and told in order to explain the invention of drawing and painting. This story started in Ancient Egypt, was adapted in Ancient Greece, and later written down by a Roman author, Pliny the Elder. So, this is first an African narrative, which then becomes a European narrative, mirroring the migration pathways of many of the children themselves. It is a story of exile, where a young woman, Calirrhoé, draws with charcoal the silhouette of her lover on the wall when he/she is called off to war or for a long journey from which he/she may never return. The father of the young woman, a potter, fills in the silhouette with his clay, thus seeding the creation of sculpture out of drawing. We mime this narrative in the class so that children who do not speak French can understand.

I then invite the children to work in pairs to draw each other. We use a bright light on vertical surfaces and projected shadows to produce silhouettes that are larger than life. Each participant draws the shadow of another child using charcoal, one of the oldest drawing materials in the history of humanity, obtained from simply burnt branches. Each exiled child, draws the silhouette of the other, is drawn by the other. They then take back their shadow silhouettes and fill in their body mass with charcoal to make a dark mass, changing their position from vertical to horizontal plane.



Figure 8. Vauvenargues Primary School, Paris, France. Charcoal on paper. Drawn between 2017-22. (Photo by C. Courier).



Figure 9. Mame (left) and Brianna (right), Vauvenargues & Budin Primary Schools, Paris, France. Charcoal on paper. 2017-22. (Photo by C. Courier).

Then we stage and arrange all the silhouettes-shadows together into one installation which illustrates the legend. I encourage collaborative gestures of drawing so there is no individual property of the trace, rather collective authorship. Large format becomes the *milieu* in which the children, the legend, the studio space, the materials all act and participate. Through this collective drawing process where the whole body is involved because of large format paper or canvas, what kind of transformation can occur?

Firstly, we can notice a shift in the lived experience of agency. The collective drawing process creates a lived experience of distributed action and creation,

which is a very different pattern of intra-active relationship where there is no possible individual action. Composite gestures of intra-action enable the children to become aware that they are connected in ways that they have never felt before, that as living beings we are networked agencies organised in non-hierarchical, non-stabilised relationships between gestures, instruments, charcoal, paper, space, humans. So the children become aware that there are no individual agencies, and as members of a “political ecology” (Bennett, 2010) they have more agency than they previously experienced.

This shift in experience is most strongly expressed in the moment when the children take their oversized outlines drawn by someone else to colour them in. A new awareness is created and voiced that the artwork is not individual, it is *dividual*, it belongs to all the agencies involved. This key moment of awareness is produced by design. At the beginning of the cycle, we share the idea that drawing collectively will require a relationship not between separate individuals, but between the parts of us that are non-individual which will communicate without mediation. This premise is posed in the paradoxical context of a societal paradigm where the artist is highly individualised, and where people engaged in a migratory process are totally tied up within their own cultural references.

The emergent property of this encounter, every time this cycle of workshops is offered, is laughter and hilarity. The children find their larger-than-life outlines, with the deformations caused by the trembling fingers of their classmate or the wavering light beam of the projector, extremely funny. Because it is a shared experience, they are willing to be seen with these deformations, and can take ownership of their surprising forms as they place them on the horizontal plane on the table. The children comment out loud the metamorphosing forms they see emerging from their own outline as drawn by a classmate, and they start to invent stories about these shape-shifting characters on the paper. The energy in the room is bright and hilarious as they fill in the outlines with black charcoal.

Secondly, the process begins to transform the configuration of the wider system at a societal level. The laughter fertilises potential relationships and symbiotic imaginaries (Courier & Winn, 2023) across and beyond the whole group for the follow-up workshops. This new creative energy becomes available in the system. As the children become more conscious of their capacity to perform various shades of their own visibility, they move from mandatory invisibility to the possibility of registering their own micropolitical presence in society. For exiled children who are experiencing displacement and instability, understanding their own learning abilities and skills is a key element that they can develop through education. Being able to imagine new roles and metamorphoses for themselves is a contribution to a vision for change in the societal system they participate in.

Participatory Drawing with Exiled Young Adults

A second example was experimented in 2021 in Canada, where I [Courier] was asked to create two workshops with the organisation Action Refugees Montreal⁴ who have worked with migrant people in the city for 25 years to help them access protection and justice, and to develop a sense of belonging in Canadian society. I used the same cycle of workshops as the experience in Paris with children, in an analogous but relationally different context. These two opt-in sessions were proposed to young adults from across the African continent, in particular DRC, Nigeria, Morocco, and Tunisia. The participants had the official status of “refugee” which gives them a particular entry point into Canadian society, so although not in the context of a formal education system, they were strongly situated in a societal system.

These workshops also sought to activate new micropolitical potentialities in the context of their experience of exile, through the collective practice of drawing self-portraits, that are not about being recognisable but visible to themselves, and to others. As migrants and refugees, there is a desire to remain unidentifiable, to resist the *taking* of identity through fingerprints, bio-identification, for the purpose of control. The workshops using projected silhouettes enable the co-creation of identity and sense-making from exiled pathways.



Figure 10. Action Refugees Montreal. A woman (E.) poses for the camera in front of a wall of large format silhouette drawings. Charcoal on paper. [Photo by C. Courier, 2021].

So in what way are these workshops in this setting a practice of systems change? The systemic effects can be observed in one key moment of collective awareness of a change in relationality, when the participants showed their self-portraits and then their silhouettes to the others. They voiced how the drawing

⁴ More can be found out about the organisation Action Refugees Montreal on their website: <https://actionr.org/what-we-do/>

process had made exile pathways visible and intelligible in their plurality. As migrants, their everyday experience is of having to hide and become invisible. In the workshops and through their drawing, the participants clearly expressed both a refusal to be visible, and a desire to be seen. The gestures insist on rendering the materiality of their shadows. Crossing their trajectories, the participants expressed how unique they felt within this small group.



Figure 11. Montreal (2019). Two women (H & K.) are drawing large format silhouette drawings of themselves. Charcoal on paper. (Photo by K. Ahmad).

The number of humans having to dismantle their previous life and attempt to rebuild it elsewhere is increasing exponentially. My research-creation is responding to the urgency of developing sensitive knowledge from exiled people and disseminating their knowledge during this “time of catastrophes” (Stengers, 2009), through exploring how their experiences can be perceived as enrichment by the country of adoption. The process is built on sharing my practice of drawing, which is a *stage of drawing* (De Zegher, 2003) on which exiled people can explore invisible and minor gestures. Drawing becomes a research operator (Zwer & Rekacewicz, 2021), engaging corporal and kinesthetic presence in time and space, with situated bodies performing their becoming visible.

In parallel to the exploration of the systemic effects of drawing in the context of migrant experience, as co-authors we are connected more widely to a field of practice inquiring into the same questions with the medium of drawing. We see our work as a contribution to this wider field, and we seek to lift up some of the work that has had a particularly potent effect on our own thinking.

One example can be seen in the work of LAB619, a Tunisian collective of illustrators and graphic novel writers. They invited exiled artists from different

countries and illustrative styles to come together in a residence to create a collection of stories of exile called *Migrations* (Figure 12, LAB619, 2021). Here the multicultural visual process layers individual lived experience and gestures, with collective and dividual awareness of exile, in a country that sees both immigration and emigration trace lines across the landscape. The cover illustration, from one of the individual stories in the book, resonates with our practice through the presence of the projected shadow of the migrant woman and the living non-human protagonists in the form of birds in the sky that remind us of different, more free, migratory journeys which are also being affected by climate change.

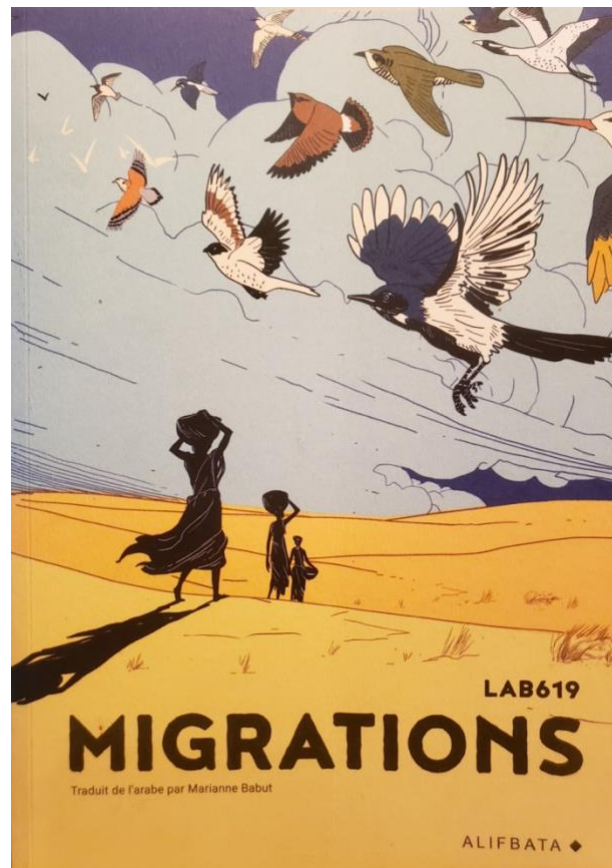


Figure 12. Cover of French version of *Migrations: Drawing exile*, published by Alifbata. (LAB619, 2021).

Another example is the co-written co-illustrated graphic novel by French authors Edmond Baudoin and Troubs, created on a visit to the valley of the river Roya on the frontier between France and Italy, a well-known border crossing for migrants. The two illustrators encounter many of the people involved with helping the migrants, and also many of the migrants themselves, whom they offer the opportunity to have their portrait done. These portrait moments are described as “magical,” when the people decide to be seen rather than be invisible, and are given their image on paper to take on their ongoing journey.

Some also do the portrait of the illustrator, in exchange. Baudouin writes about the portrait sitting as a moment of being seen:

I start with the eyes. They avoid my gaze, but I insist by putting two fingers in my eyes. Then all of a sudden, they accept the silent dialogue... And it's me who panics when I see what they show me. [...] How long has it been since they last looked someone in the eye? How long has it been since they have been looked in the eye? (Baudouin & Troubs, 2017, p.58)

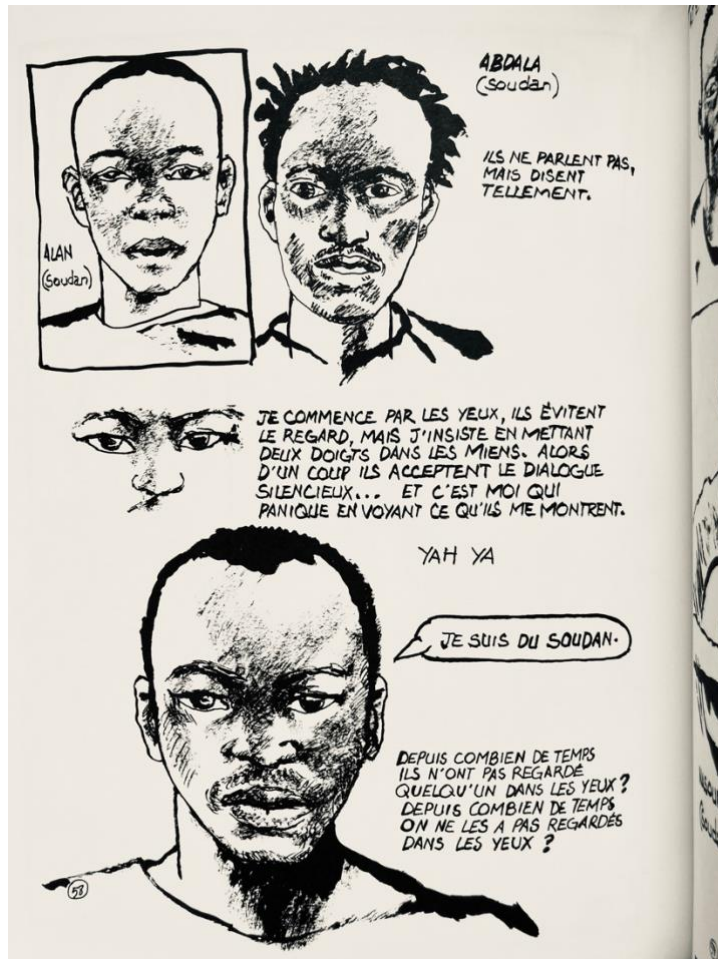


Figure 13. Migrant portraits. (Edmond Baudouin & Troubs, 2017).

This description by the artist of the silent dialogue and the migrants' choice to be visible, to show themselves and their story through the medium of drawing, serves as a resonant confirmation of the effects seen in the workshop Camille Courier facilitated in Montreal.

From Facilitating Visual Practice to Creating the Conditions for Images to Come Alive

In this section of the paper, we reflect on the dynamic relationship between us as learning designers and facilitators of visual practices, and the facilitative capacity of images themselves.

Facilitative Capacity is Needed for Systems Change Practice

An initial step into exploring new relationalities for systems change is often a recognition of non-linear, beyond-binary relationality in the world as it is now. This can be lifted up by exploring the flows in complex systems through mapping, or through participatory drawing exercises as we have illustrated in this paper. However, these practices do not lead to inherently more just or regenerative outcomes, it is *how* they are used that enables meaning-making. We need to remember that practices have lineages and design choices behind them. Many systemic practices have been developed within Indigenous knowledge and ancient wisdom (Goodchild, 2021; Yunkaporta, 2019); these wield a deep understanding of relationality and structural relationships. The structural design is sourced in the deep connection with the land, and the living emanations of the land in the form of elements, processual dynamics, plant species, animal species including humans and ancestors. Discernment of what is between—we might say living within, inhabiting—the lines, is a key capacity if we are to work with these thinking technologies to shift paradigms.

Similarly, participatory visual arts practice does not inherently engender awareness and exploration of new relationalities. For the micropolitical dimension of the work to be engaged, the learning is facilitated in a way that situates the drawing process in a wider sociopolitical context. Today's drawing is resituated within the lineage of drawing, and the framing and invitation to participate emphasises how creative processes are embedded in sociocultural activities (Glăveanu, 2015), connected to human and other-than-human distributed agency. All of this is conveyed in simple and easily understandable terms that speak to the lived experience of children and adults alike.

We are reminded of the importance of facilitative capacity for this work, which supports people to engage with our power and positionality, and with knowing what we don't know. This is another layer of relationality, where beyond exploring the relationships within a given system, we bring awareness to our own relationship to the system and our collective agency.

Engaging with the Ways of Being of Images Themselves

At the same time that we recognise the need for facilitative capacity in learning environments seeking to bring awareness to and develop new relationalities, we are equally aware of the power of images themselves to facilitate change. If we

are able to create the conditions for people to engage through the drawing process with the ways of being of the images themselves, this can be enough.

We can illustrate our experience of this through a collective project where we spent time together in Egypt participating in an informal, opt-in educational initiative with children in Gurna (Arabic: القرنة) near Luxor. I (Courier) was involved over several years and Laura Winn joined me during one season. Two other French artists—a graphic novel illustrator and fashion artist—created in 2001 a project for children in the place where they lived. The “workshop” was open to local children and adolescents from 3 to 16 years old, with no cost, one day a week. It was a place of pluralistic artistic practice—illustration, textile, drawing, sculpture. When I (Courier) joined the team, I introduced the possibility for the children to work in large formats, directly on the raw earth walls, so they could explore a space larger than their own bodies.



Figure 14. Gurna children's workshop. From left to right : Fatma, Camille, B., M, Amani, Laura, Walid. Collective drawing and painting on large format paper made by the children. Egypt. (Photo by E. Viet & D. Cottet, 2002).

In the village of Gurna there is a strong tradition of figurative wall paintings, both interior and exterior, on raw earth walls. The children who come to the workshop are immersed in this culture of wall paintings. Their parents, brothers and sisters are painters and sculptors in this medium. They are surrounded by temples and tombs covered with ancient wall paintings. The royal tombs are extremely stylised. The tombs of the artisans—Deir El Medineh—are covered with more fluid, living images like those of grape vines.



Figure 15. K. and F. M. drawing and carving for the boat project. Gurna, Egypt. (Photo by E. Viet & D. Cottet, 2002).

In this context, we were able to create the conditions and provide some materials which became the territory for artistic creation. My greatest insight through this work was that we did not need to *teach* anything. Bodies move in collective gestures and as visual practitioners we are just in the presence of flows of images. Drawing becomes the primary language in a plurality of languages gathered through the children's relationship with tourists, ancestors, older and younger family members, the desert and the river. Fine art and elitist culture connect with popular culture and multicultural relationships in the flow of the drawings in the workshop. We know learning is happening because of the joy and laughter that accompanies the activity (Yunkaporta, 2019).

Through one project on the theme of boats, designed towards an exhibition of the children's artwork in Paris at the Egyptian Cultural Centre, they created images and became cartographers of their territory and beyond, representing the trajectory their images would take all the way to Paris. In this manner, they became aware of lines of relationship across liquid edges, across space and time.

In a film called *The Slightest Gesture* (1971), Deligny and Manenti inspire the way we can read a mapping process. Deligny rejects the dominance of language and proposes a method of cartography called *lignes d'erre* (wander lines) that is founded on a deep consideration of milieu, as related to subjectivity. Working with autistic children, he drew their paths among the houses, studios and outdoor spaces constituting the "network" of the space around their collective place of living. He drew on tracing paper or other transparent materials, and superimposed them, building up a complex cartography of relationship (Alvarez de Toledo, 2001) This is not revealing a binary relationship of child and topography, more an intra-active becoming. Barad asserts that to understand the complexity of the world, we need to focus on "dynamic topological reconfigurings/ entanglements/ relationalities/ (re)articulations of the world" (Barad, 2007). Drawing is in this sense a material-discursive practice embodying ongoing

translation and rearticulation of the world in its living and mattering. Although these movements and minor gestures were not intentionally drawn for systems change, Deligny (2015) has been influential in seeding a new paradigm where neurodiversity is recognised and celebrated, rather than in need of correcting or controlling. The way he drew these children's paths highlights his own displacement/shift about emerging relationalities. He began his career working as an *educator*, intending to teach or cure the so-called "difficult" children and teenagers. While he was recording with a pencil on tracing paper these wandering footprints, he wrote that his approach changed, and focused on "living with" our environment, and the children.

In these situations, in Gurna and in the Cevennes, we see systemic change happening as the children are no longer being *taught* but are producing learning and belonging through their collective lived experience of drawing. The children in Gurna are free to come and fabricate their own agency, with no utilitarian goal, unlike when they create artworks for tourists. They are not empowered by teaching but through an open process of developing their own power, and we know this is happening through the pleasure and joy they express. This explores a new pattern of relational equity between children and adults in society. In the context of an imperialist white supremacist capitalist patriarchal society (Hooks, 1994) which thrives on the domination and exploitation of the "weak," whether women or children, this "workshop" became a space of liberty where the children were free to develop this horizon of equity through drawing joyfully on the walls, in relationship with all the available teachings of their ancestors, families, the live materials of their place, and with the feeling of joy itself. These are modes of existing, relating, and being that we share with all of the living world, but that we adult humans no longer practice freely.

Conclusions: New Relationalities to Explore

What Kind of New Relationalities Are We Seeing Emerge?

Drawing practices can bring awareness to and enable the exploration of new relationalities, "decisive mutations of plurality" in a changing world. As practitioners, we learn through proposing visual arts practice to others. It is a rhizomatic co-evolution process, beyond the duality of teacher and student. We see relationalities emerging in these mythical times that are decidedly beyond duality; embracing all of life in configurations that are sometimes symbiotic, sometimes parasitic, always *polytical*: Damasio coins this term "*Polytics*" meaning a political stance which surpasses binary camps in order to organise inevitably multiple relationships (Damasio, 2020).

Whereas the mechanistic paradigm can be characterised by the conceptualisation of simple cause-and-effect relationships, a living systems paradigm is sourced in complex multitudes of relationships. Agency is enabled through nodal interventions rather than hierarchical authority. The binary of

black and white, good and bad, female and male, top and bottom, etc. gives way to a nuanced and ever-evolving plurality.

As change practitioners and learning facilitators, we seek to engage in relationalities that are expansive, including all forms of life and vibrant matter (Bennett, 2010). We are learning to develop ways of being-in-the-world intense enough to understand somatically the idea of “all my relations” that we are invited to consider by some Indigenous scholars (Goodchild, 2021; Yunkaporta, 2019). We have explored symbiotic imaginaries (Courier & Winn, 2023) and embrace a broad, political definition that includes parasitic relationships as much as relationships of equitable exchange. Here we include images as “quasi-organisms,” “parasites or adjuvants” living within us (Simondon, 2022).

To Conclude: Education Systems as Fertile Habitats for Image-Organisms

Through this co-inquiry into transformative education and drawing practice for systems change, we have felt the potential to support the emergence of new relationalities that can embody new paradigms. In these mythological times, we invite people to unleash the power of an expanded definition of drawing, through a live practice of visual learning to seed new relationalities everywhere. Our proposal is not to make drawing education obligatory, more to support images’ parasitic quasi-organism qualities; they are shape-shifting, fugitive, in the cracks, interstitial, unpredictable, emergent. Thus, new relationalities can become ubiquitous intra-active forces for systems change. This is particularly relevant and powerful within the structures of formal education systems which can serve as fertile habitats for opaque populations of image-organisms with transformative power. Just as offshore oil rigs serve as habitats for new reefs and emergent marine life.

We intend to continue to explore new relationalities and visual practices for systems change, with a line of inquiry taking us towards collective and embodied large-scale drawing practice together with more-than-human beings and energies. We have inquiry questions around “Who (else) is drawing?”; “How might we develop new relationalities with images that inhabit us?”; “What can the experience of drawing teach us about how we can cultivate learning for systems change?”; and “How can we partner with the power of images in their becoming, connecting to the deep reservoir of energy for system change that we intuit within the ways of being of images themselves?”.

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Peer Review Article

Harnessing Dialogue as a Social Technology for Systems Change in Development Institutions

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Abstract

Across global development discourse and practice can be seen a growing a recognition that deep transformation of social, economic and ecological systems cannot be achieved through new policies, data or technology alone. The capabilities needed for twenty-first century leadership and governance relate to the ability to create new conditions, relationships and pathways for social and moral imagination to flourish. Drawing from an in-depth case study of several interlinked initiatives of the United Nations Development Programme to build such capabilities among development practitioners, this conceptual paper elaborates the continued need for, and pathways and barriers to institutionalizing, more dialogic and process-based approaches to systems transformation in mainstream development processes. It posits that a reconceptualization of dialogue within multilateral and government-led systems transformation frameworks in particular can help valorize the seeds of development impact that reside in the sites where culture, relationships and

shared consciousness are built. Further learning is needed, however, to understand and address barriers that lie in normative perceptions, organizational culture, and accountability frameworks of these institutions, which impede the rhetorical interest in inclusive and transformative dialogue from translating to more process- and relationship-centric ways of working. As a contribution to this learning, the paper considers how conceptual frames that give weight and visibility to the role of social containers in systems change processes, with dialogue as a core technology for container-building, can help advance more transformative development paradigms and praxis that tend to the reciprocal relationship between inner change and societal change.

Keywords

systems change, dialogue, global development, systems leadership, relational systems change

Introduction

In this final decade of the 2030 Agenda for Sustainable Development, the achievement of which was premised on a radical coming together of all nations, sectors, and communities, more global development attention has turned to the question of what kinds of processes actually enable the ways of thinking and working required for this integration. This can be seen in governments, multilateral, and other development institutions convening discourse on the future of governance (e.g. World Bank, n.d.; Johar & Bergovic, 2020), undertaking experimentation with innovative methods for working with systems and complexity (Annala et al., 2021)¹ and engaging with initiatives that acknowledge the significance of inner development for the Sustainable Development Goals (SDGs).² Whether sparked by deliberate reflection or a forced reckoning with historical blind spots as new forms of insecurity unfold in this age of the Anthropocene and looming polycrisis, more openings have emerged across traditional development spheres to interrogate existing modes of operating and test alternatives. For the most part, this hasn't led to a rejection of the foundational enablers of systems transformation long articulated in global and national development strategies—e.g., co-creation, participatory mechanisms, effective collaborative action, multi-stakeholder partnerships, transparent institutions, innovation—but rather, a deeper examination of the gaps that

¹ See also this list for global government innovation labs: <https://apolitical.co/pages/government-innovation-lab-directory>

² For example, the Inner Development Goals: <https://innerdevelopmentgoals.org/about/> and Conversations on Rethinking Development: <https://council.science/wp-content/uploads/2020/06/Conversations-on-Rethinking-Human-Development.pdf>

persist between what we value in theory and where and how we invest our attention and resources in practice.

One aspect of this inquiry that the United Nations Development Programme (UNDP), and the UN more broadly (Hentsch, n.d.), has increasingly explored pertains to the question of what counts as development impact and what forms of innovation and learning are most critical to progress, if the deepest leverage points for change lie in the mindsets and paradigms that give rise to systems (Meadows, 1999). In some spaces, this has prompted renewed examination of the kinds of dialogue processes that can serve as bridges between individual or inner transformations, and work to transform policies and structures in pursuit of social, economic, and ecological regeneration.

This paper draws conceptual inferences from an in-depth case study, framed by my own positionality as both participant and co-designer, of several interlinked UNDP initiatives to build development practitioners' capabilities to lead systems change in ways that give primacy to the role of inner transformation and relationships. Complementing lived experience with theory, it primarily elaborates the continued need for, and pathways and barriers to, mainstreaming more dialogic- and process-based approaches to systems change in multilateral and governmental ways of working. It is premised on the notion that bringing greater attention to the seeds of development impact that reside in the sites where culture, relationships, and shared consciousness are built can create new opportunities for shifts at the level of *how* as much as the *what* of sustainable development, which is necessary for deep change amidst the complexities of 21st century challenges. Situating more learning and value in the dialogue process itself—particularly the ways bureaucratic development institutions build the social containers for shared being and thinking—can help cultivate a development praxis responsive to the reciprocal relationships between internal change and societal and structural change.

The paper builds from a recognition that while many theories and rationale for dialogic based change models and forms of leadership (Isaacs, 1993; Pruitt & Waddell, 2005) exist—as section IV discusses—a key question persists: why have the ideas behind such models remained largely on the periphery of government and multilateral-led development praxis, or applied only to certain development domains and policy challenges? The core analysis in section V explores the value of situating dialogue outcomes against imperatives for systems change, as a way to confront conceptual barriers to the institutionalization of process-oriented development approaches in these contexts. It is organized into four paradigm shifts to bridge divides between systems change theory and development as traditionally practiced by mainstream development institutions, from: 1) linear delivery orientation, to shared meaning making and relationship orientation; 2) immediately moving in systems, to seeing the assumptions behind our directions of travel; 3) reliance on 'objective' or 'neutral' data, to understanding the role of power in knowledge systems and construction of neutral truths; 4) identifying the 'right' technical solutions, to co-creating the wisdom and capabilities that

enable continuous learning. Insights from UNDP’s awareness-based dialogue experiments are included in each shift as examples of effects that can arise from initiatives that *reposition where and how development actors perceive and leverage generative dialogue as a foundational technology for systems change*. Section VI considers some pathways to address persisting cultural and normative barriers that limit governments’ and multilateral institutions’ ability to move from rhetorical appreciation of dialogue to transformations in their core business models based on dialogic change paradigms.

Methodology

The primary data comes from a series of four interconnected global UNDP initiatives—described in detail in section III—conducted in partnership with the Presencing Institute since 2020 to build development practitioners’ literacy in awareness-based systems transformation.³ These virtual dialogue and practice spaces consisted of:

1. Two global dialogue series that helped practitioners to explore the potential of awareness-based collective action to improve development outcomes. The first, a Summer Dialogue Series between June-September 2020 consisted of four dialogues and drew more than 1,000 UN personnel from every region and diverse job profiles. A Transforming Systems Dialogue Series in January-June 2021 built from this with five sessions applying the same principles to the core questions of the 2020/21 Human Development Report (HDR), as a point of focus for co-inquiry into mechanisms for systems transformation.
2. An application-based four-month action learning lab (hereafter referred to as the Action Learning Lab) in 2021, which selected some 400 practitioners from seven UN entities and diverse development contexts, as both individuals and teams, to apply awareness-based systems change approaches to better navigate either specific development challenges of their choosing with governments and other partners or internal institutional change opportunities.
3. A similarly structured five-month leadership certificate (hereafter referred to as the Leadership Certificate) in 2022 tailored to senior leaders, with a first cohort of 35 heads of UNDP Country Offices mainly in South America and Africa, that supported them to cultivate and apply

³ Various definitions of awareness-based systems change/transformation exist; for this paper, it is useful to consider that of Koenig et al. (2023, p. 3), which frames it as a change theory or model that sees the basis of systemic change as “changed relationships,” and that attending to the quality of “inner-outer relationships” is the means by which we “create the conditions [...] for the relational changes that undergird systems change.”

systems leadership capabilities to their organizational and/or policy challenges with partners.

4. A three-month co-design process with participants of the senior leaders' Leadership Certificate, to connect the principles and methods of the course with efforts to engage government, civil society, private sector, academia, and other stakeholders in more transformative policy dialogues inspired by the 2021/22 HDR.

A mix of methods were used to gather insights from these, including UNDP-led post-session reflections among facilitators and designers of the processes, feedback surveys of participants, and real-time reflections on experiences in the programmes elicited as part of the sessions themselves. For the largest initiative, the Action Learning Lab, a team of learning scientists from Parsons School of Design conducted design-based research to learn from participants' experiences of what capabilities—mindsets, skills and perceptions—are required to lead and transform systems. They deployed a range of methods over the four months including qualitative and quantitative data baseline data collection through a survey, semi-structured in-depth interviews to understand the emotional and behavioural effects on participants and their work, and two design-led workshops with small groups. The synthesized insights in this paper reflect the feedback from all four initiatives, while the direct quotes come namely from the Action Learning Lab and Leadership Certificate surveys, focus groups and anonymized real-time reflections from live sessions. They therefore represent the views of a diverse mix of UNDP and other UN participants from varied job functions, levels of seniority, and geographies.

My own positionality is important to highlight here as an additional lens for the data analysis and an acknowledgment of the links between internal and external transformation (Wamsler et al., 2021) which is intrinsic to the learning process. This includes, at different phases, engagement as a UNDP participant, an observer and learning codifier, and a co-designer and coordinator, further informed by nearly a decade of work in diverse UN contexts. At the same time, the analysis is shaped by my personal experiences of the transformative potential of dialogue models from non-UN or professional spheres, including voluntary and faith-based domains for collective decision-making and action. This includes involvement in Bahá'í-inspired community building processes, as well as engagement with voluntary informal staff-led initiatives within UNDP to build new culture and consciousness on issues of antiracism and decoloniality. These processes often stood in stark contrast to multilateral and government processes I had observed with similar end goals. They were characterized in particular by a primacy ascribed to building meaningful human relationships grounded in care, a commitment to the creation of spaces that enable seeing and understanding others' overreaching set goals, and not separating the 'spiritual' or intangible dimensions of change from conversations about material, economic, or social change. The UNDP case examined in this paper was the first example I had witnessed of these same dialogue qualities and outcomes, often found in non-

governmental, community-led processes, being applied at large scale in the UN under the frame of systems transformation. The value latent in bridging these different worlds, mirrored by my own experiences straddling two distinct paradigms for change, is among the inquiries that inform this analysis.

The Case Study: Unlocking Systems Capabilities Through Awareness-based Dialogues in UNDP

As noted, the direct quotes and experiential insights that are the grounding for this paper reflect synthesized learning from a series of interlinked UNDP initiatives. This section provides background on some key features of these spaces and the approaches that underpinned them.

The Initial Experiments

In 2020, the chaos and uncertainty surrounding COVID-19 and the UN and governments' degree of readiness to brace its consequences sparked deeper reflections in UNDP on what it takes to move beyond fixing what is broken in existing systems, to instead work in ways that might better create the conditions for new systems to emerge, founded on shared values and solidarity. This overarching question led UNDP's SDG Integration team to partner with the Presencing Institute to co-create several action learning initiatives, starting with a dialogue series in the summer of 2020, which invited practitioners to experiment with more mindful, relational, self-reflective, and systemic ways of leading collective action amidst complexity and uncertainty. These dialogue-based capability building processes were premised on helping development actors expand their *transformation literacy* with an underlying hypothesis that transformational change cannot arise without first cultivating the ability to tap into the power of one's own *awareness* and forge a more collective consciousness.

The virtual learning spaces that followed from this initial experiment, as highlighted under Methodology, took several additional forms including: 1) a second dialogue series with a more applied focus, drawing in particular from the HDR to help practitioners explore the relationship between awareness-based methods for understanding and working with systems, and the nature of complex development challenges in the age of the Anthropocene; 2) A four-month action learning lab for practitioners to deep dive into the practices through testing them on the specific development challenges they were working on with partners or internally; and 3) A similarly structured five-month leadership certificate tailored to senior leaders, with a focus on developing skills for systems leadership.

Each of these learning spaces were grounded in methodologies from Theory U, which is a framework for systems change that supports leaders to collectively develop awareness of the "inner places from which [they] operate," based on the notion that all social action comes into being from this source place (Scharmer, 2009, p. 101). It offers a model for learning and acting "from the future as it

emerges,” which means identifying solutions for change based on visions of future potential and discovering what works through iterative experimentation (Scharmer, 2009, p. 97). This approach turns the focus of change processes to source dimensions of change, such as the “structures of attention” in a system, which shape how people perceive future possibility, and the quality of the “social field,” which Scharmer describes as the quality of relationships that give rise to practical results (Scharmer, 2009, pp. 100–101). The framework draws from a range of disciplines including action research and organizational learning, design thinking, mindfulness, and civil society movements.

Bringing in their own development policy or organizational challenges, participants worked through Theory U principles and approaches, which support a process to co-initiate intentions for change, co-sense to better understand their systems from the whole, connect to their source of highest potential, and co-create their visions of the future through action and network-building. The Action Learning Lab and Leadership Certificate included three-hour monthly workshops with ample time for reflection, connection with peers, and incorporation of the arts as a way to expand sensing; one-on-one coaching to help work through individual goals and limiting beliefs; and small groups that engaged in self-led peer coaching circles—a safe space to practice deep listening and seeing their work in new ways through the mirror of others.

Ultimately, these labs for testing new modes of being and action enabled practitioners to unpack the more intangible dimensions of systems change at play in their work. They offered experiential glimpses into the power of holding space differently, as resonant with ideas from social field theory, relational infrastructure and others that articulate the tangible effects of intangible connections (Pomeroy & Herrmann, 2023; Rye, 2023), and a chance to reconsider the role of leadership as the work of building infrastructures of connection. Any outcomes borne of these efforts therefore were less attributable to any single tool, method, or formulaic approach to building new capabilities and cultures, but rather, to a broader emphasis on treating social containers as worthy of attention and investment.

Reinforcing Pathways to Valorize and Cultivate Dialogue Differently

In an effort to build from and further institutionalize these awareness-based systems transformation approaches, an emergent stream of this work has focused on supporting practitioners to reimagine modes of dialogue geared to transformation. It aligns with theories that position dialogue as more than mere conversation, but rather a process to build “field[s] of new meaning in which profound collective insight and reorientation appear, out of which people can take aligned and effective action” (Isaacs, 1996, p. 20). While dialogue-based development approaches and investments in multi-stakeholder collaboration was not new in UNDP, the focus here was to double down on and better harness the *generative* potentialities of dialogue models for navigating policy uncertainty,

recognizing the importance of common language and entry points to cultivate this potential. This became the basis for grounding the work in a tangible resource and linking it to policy explorations of the ‘soft’ dimensions of change—such as shifts in values, culture, and other forces that influence choices and behavior—that the Human Development Report (HDR) 2021-22 brought to the fore.

Through a series of co-design sessions with leaders who completed the Leadership Certificate, UNDP’s SDG Integration team and Human Development Report Office with the Presencing Institute produced an HDR Dialogues “field guide”⁴ that offers ideas inspired by Theory U for development actors and others to initiate more generative, relational- and awareness-driven modes of thinking and collaborating via processes geared to complex policy challenges, or efforts aimed at systems transformation. By focusing on dialogue as the container within which to practice new patterns of relationship, and through this, expanded consciousness and understandings of systems, the guide places emphasis particularly on the work of facilitation in leadership. While sharing different approaches for facilitation, it does not prescribe a single type or set of tools, but rather encourages leaders to become more reflexive about the conditions or building blocks required to make co-creative and inclusive dynamics possible, which become the basis for testing alternative approaches and learning and iterating based on their observed effects along the way.

By putting dialogue in the fore, the field guide ultimately prompts practitioners to consider what constitutes an ‘outcome’ within development efforts in the first place, so that more emphasis is placed on the many interim pieces needed to shape more systemic, collaborative, and transformative ways of thinking and working. This approach aligns with findings from the Generative Dialogue Project and similar research that there is “value in making more explicit the goal of deep change and the strategic options for pursuing it; the differences among [different impact levels borne of different] change activities; and the role of dialogic conversation in change strategies” when working to shift stakeholders’ relationship to and investments in dialogue processes (Pruitt & Waddell, 2005, p. 43).

Building Enabling Ecosystems for Existing Wisdom to Land: Not Recreating the Wheel

The methods behind the UNDP initiatives and broader argument for dialogic- and process-based change approaches are not novel. What the UNDP example can offer, however, is insight into where these existing theories and practices

⁴ Full guide available online: <https://www.undp.org/publications/field-guide-human-development-report-2021/2022-dialogues>

might better permeate core sites of decision-making and transform development processes and institutions. Viewed against trends from common practice, as this section touches on, the innovation of the UNDP case lies less in the novelty of the methods, but in where, how, with whom, and for what purposes they were targeted.

While numerous examples exist of transformation-oriented dialogues being applied to national and sub-national socioeconomic processes, one limiting factor is that their perceived relevance often *falls within a limited set of development domains and stakeholder contexts*. Particularly when the dialogue processes entail significant time or cost implications, they tend to be more readily invested in for issues “where conflict is perceived to be a barrier to forward movement” (Pruitt & Waddell, 2005, p. 23), or in the realm of crisis, conflict and peacebuilding interventions more broadly. Many examples cited in literature over the decades fall into this category, from post-apartheid multistakeholder dialogues in South Africa to other “future-carving processes in other conflicts” (Kahane, 2007, para. 12) used to create “safe and open space” (para 9). In such cases, dialogue has been used to build trust among diverse stakeholders as a foundation for larger political transformations. The longstanding field of multi-stakeholder dialogic processes, as defined in literature like *Collaborating: Finding Common Ground for Multiparty Problems* (Gray, 1998), has also often taken as its starting place the idea of collaboration as a means to resolve conflict or for groups to define problems and implement solutions.

Examples of more transformation-oriented dialogue processes are also commonly found within non-governmental contexts for cultivating trust and solidarity across diverse segments of society, for example in civil society-led initiatives such as those of the US National Coalition on Dialogue and Deliberation (NCDD, 2024). Thought leadership in the realm of representative deliberative democracy (OECD, 2020), participatory governance, and more imagination-based planning also speak to the necessity of spaces that enable shared being and thinking, including the creation of “intelligence assemblies” (Mulgan & Demos Helsinki, 2020, p. 27).

What the UNDP case study argues for, on the other hand, is applying the same types of principles and methods already found in many of these non-governmental spaces, or in a limited range of policy contexts, much more systematically across all stages of governmental and multilateral policy and programming processes aimed at systems transformation. In particular, it recognizes that many of the dialogue processes enacted in high-level bureaucratic fora, or with the aim of bringing many stakeholder groups into government policy processes, do not arrive at forms of dialogue that might be considered “generative,” or bringing “forth creative energy and collective intelligence out of a personal sense of connection to the whole” (Pruitt & Waddell, 2005, p. 8). While certain actors might serve as skilled facilitators in these processes, less often are the processes themselves designed to build mindsets and intentions of “dialogic leadership” across the group, or the capacity to consistently uncover through

dialogue “the hidden creative potential in any situation” (Isaacs, 1999, p. 2). The incentive structures behind such processes often render them more a box-ticking exercise than a genuine investment in building spaces that allow people to “evoke [their] genuine voices, [...] listen deeply, [...] hold space for [...] other people’s views, and [...] broaden awareness” (Isaacs, 1999, p. 2).

A related gap in bureaucratic contexts lies in limited examples of dialogues being used to *disrupt or call into question existing power structures or institutional ways of working*. This might be seen, for instance, in the example of UNDP itself having a history of supporting effective, transformation-oriented dialogues via its programming, from support to democratic dialogue and conflict prevention to combatting climate change (Pruitt & Thomas, 2007), but these same approaches seldom applied with the same level of rigor within its own organization’s capacity building or planning and decision-making processes. As Bohm & Weinberg (2004, pp. 7–8) reflects, what are “often considered to be dialogues” in the United Nations are in fact “more like trade-offs or negotiations” because the participants are “not really open to” or incentivized via the expectations and tone of the spaces to “[question] their fundamental assumptions.” However, as section VI explores, the forces that dictate whether dialogue is leveraged as a genuine tool of social change instead of surface-level display of inclusion, may in part be influenced through strategic efforts that can render more visible the links between dialogue design and power, and between small-scale intangible change and large-scale systems change.

Another potential shortfall lies in *over-emphasis on the role of individual skills gaps as a root cause of ineffective dialogue processes* in multilateral and governmental contexts. Many field books, for example, offer techniques to design and facilitate multi-stakeholder partnerships (Hemmati, 2002). It is not that the theories and tools do not hold merit, but that the *ways* by which they are brought into institutions, and to whom they are targeted, may be too limited in scope. In particular, when these tools are incorporated into cultures that prioritize rigid definitions of efficiency and outputs for development without accompanying work to interrogate the value of these definitions, there is less incentive to apply them in ways that entail significant disruption. Despite their rhetorical interest in dialogues that pave the way for systems change, the continued accountability to these definitions and outcomes mean these institutional processes continue to give “little attention [...] to the relationship between [...] the ‘what’ and the ‘how,’ and the ‘doing’ and ‘being’ of transformation,” or ways of working that valorize this relationship (Bentz et al., 2022, p. 498). Similarly, dialogue models like those found in liberating structures or wisdom circles (Wenger, 1998) where a primary aim is to cultivate “microstructures that enhance relational coordination and trust” (Liberating Structures, n.d., Introduction, para. 9) are often more readily applied to team-building exercises or in engaging target populations of innovation-oriented development interventions, but less often as tools to systematically reconfigure more traditional, outcome-driven government or multilateral planning mechanisms.

Shifts in Dialogue as Levers for Transforming Paradigms and Systems

This section contextualizes some of the emergent insights from UNDP's four interlinked initiatives described in section III within the kinds of macro-level paradigm shifts needed for cultivating the relational bedrock for systems change. It offers one frame to help development practitioners reconceptualize how the application of different dialogue-based methods or intentions can enable shifts from processes that reinforce existing mindsets and cultures, to those which support the development of systems capabilities and intangible outcomes critical for deep change.

Common paradigms reinforced by dialogue models	Alternative paradigms or outcomes dialogue can cultivate	Example approaches or principles to shift dialogue outcomes
Linear delivery orientation	Shared meaning as fuel for non-linear transformation	<ul style="list-style-type: none"> • Reflecting on the values and mental models that frame thoughts • Success not pinned to specific outcome or end result • Time and space for trust-building
Effectiveness as immediate actions / urgency as speed	Effectiveness as mindful action / urgency as depth	<ul style="list-style-type: none"> • Cultivating imagination and shared visions to guide action • Interrogating assumptions and biases as part of ideating • Ample space for individual and group reflection • Use of play to spark new modes of thinking
Objectivity and quantitative knowing as gold standard	Embracing pluralistic modes of knowing, to understand systems and shift power	<ul style="list-style-type: none"> • Applying power analyses to the decision-making process • Methods that integrate multiple forms of knowing (e.g., embodied intelligence, intuition) • Inclusion defined not only by who is brought to the table, but who determined the protocols for engagement
Finding technical solutions	Co-creating the wisdom and capabilities that unlock new learning pathways	<ul style="list-style-type: none"> • Using the tone and format of spaces to encourage divergent thinking • Methods to continuously reframe the problem and system • Investment in relationships that inspire new modes of action

Table 1: Four paradigm shifts for systems change & dialogue levers to cultivate them.

From Linear Delivery Orientation → To Shared Meaning Making and Relationship Orientation

The Divide Between Theory and Practice

Whereas many development processes continue to cater to that which is most easily measurable via quantitative or pre-defined indicators, often equating to solutions that are predictable or look at an isolated facet of a system, a more “complex systemic perspective lets go of controlling [...] interactions and instead focuses on designing conditions, infrastructures, or enabling platforms that promote the emergence of new behavior and learning within human relationships” (Bijl-Brouwer & Malcolm, 2020, p. 397). This mode of operating is one that is attentive to emergence, or the “collective behaviours” (Bar-Yam, 2011, para. 1) and “qualities and capacities” (Wheatley & Frieze, 2006, para. 2) of systems that do not come from any one person or component alone but arise from their constantly evolving interrelationships. A theory of change grounded in emergence does not deny the uncertainty inherent in complexity but works with it by treating change as something that continuously unfolds from specific conditions, not as “a point at the end of a process” (Design Justice Network, 2018, Principles, para. 6). As a result, it emphasizes principles such as “critical connections over critical mass, building authentic relationships, [and] listening with all the senses of the body and the mind” (brown, 2017, p. 5). Numerous movements embody this lens, such as that of design justice (Design Justice Network, 2018) or the growing field of systems leadership (Dreier et al., 2019), but these largely remain on the margins of mainstream development.

Levers for change through dialogue

Much of development is organized around a “scientific rationalism [...] which recognizes as real only that which can be measured and therefore excludes the knowledge that comes from the heart or from relationships between people” (Boggs & Kurashige, 2012, p. 97). Dialogues can act as a tool to unlock pathways for culture change when designed to promote the development of shared meaning, as opposed to simple or singular solutions based on existing understandings of a problem. It is through dialogue specifically that people can unpack the process of thought behind their assumptions, or change “the way the thought process occurs collectively” in order to get to the heart of insoluble problems, which are only insoluble as a result of being continuously produced by our thoughts (Bohm & Weinberg, 2004, p. 9). Dialogues that are about mirroring our assumptions and values back to us so that we can be more intentional with the ones we apply to decision-making are also those that valorize the “endeavor of unfixing, of dismastery, of community-supported bewilderment” as part of transforming systems (Gay, 2023, p. 166). These approaches also help overcome the “limitations of subjective [...] understanding” in many decision-making

processes, by giving space for the formation of intersubjective agreement instead (Karlberg, 2020, p. 59).

The necessity of unfixing something in order to make space for something more generative and co-creative in its place showed up in numerous ways through UNDP's Leadership Certificate. Some practitioners shared explicit intentions, for example, to use the space as a chance to “deconstruct [their] inner reality and vision to co-create a different one” or to “abate some social norms still nestled in [them].” Having the permission and space to do this also led to discourse on the role of delivery pressures and time constraints on their ability to listen or to “actively make space for others” to be their authentic selves in multi-stakeholder dialogues. For some leaders, it reinvigorated their commitment to carve the protected space for their own teams to think and connect outside the daily pressures of their work.

Through the action learning processes, practitioners also gained greater appreciation for the level of intentionality, time, and iterative learning required to actually foster the conditions needed for true co-creation and collective leadership. In a sense, it was a chance for many to return to the ‘basics’—such as how we think together, listen, reflect, or formulate questions—and trace their connections to the broader work of transforming systems and structures. As one practitioner noted, “it's a little bit of learning how to [create] a dialogue, how to have a conversation on basics.”

From Immediately Moving in Systems → To Seeing the Assumptions Behind our Directions of Travel

The Divide Between Theory and Practice

Whether viewed through the lens of the “capabilities approach, development as freedom, physical and mental well-being, [or] basic human needs,” diverse understandings of human development share an “ethical core, an embedded notion of value underpinning [the] conception of human development (International Science Council, 2020, p. 30). If we consider goals of development like “helping people lead their lives by expanding their capabilities” and freedoms (UNDP, 2023, p. 11) or as a means by which to build the social foundation through which people can “cultivate the limitless potentialities latent in human consciousness,” (Bahá'í International Community, 1995, Section V para. 1), then an imperative includes investing in that which can also guide the release of assumptions and social structures that do not expand freedom and well-being for all. However, development goals that focus on primarily material or economic markers of progress such as GDP or processes that rely on linear understandings of change often foreclose engagement with the “transcendent” dimensions of human life in the spaces where social and economic initiatives are deliberated, including values, traditions, and perceptions, which are deep motives for action and catalysts for unlocking “the creative capacities within

human consciousness” (Institute for Studies in Global Prosperity, 2008, p. 2). Mulgan & Demos Helsinki (2020) similarly underline the significance of consciousness and spirit in the pursuit of social and material progress, which have ramifications for the forms of data sought and produced to make decisions. Since there can “be no hard evidence for an imminent change in consciousness,” it follows that “over-analytic, incremental or evidence-based approaches,” at least in the limiting Western and neocolonial approaches to defining evidence, cannot serve development goals of this magnitude (Mulgan & Demos Helsinki, 2020, p. 30).

Levers for Change Through Dialogue

Whereas many existing policy processes prioritize modes of discussion and consensus-building that enable the quickest route to implementation, there is also a role for dialogues that pause to consider, what is it that we are speeding towards and why? Dialogue can function as an “invitation to test the viability of traditional definitions of what it means to be human,” and thereby make space to propose and practice the implications of alternative definitions that may be better foundations for realizing social and economic systems that benefit all (Nichol, 1995, p. xvi). Waddell (2005, p. 17) even defines “generative dialogue” as a process of “re-visioning’ future possibilities.” Given that “to take part in truth we must see our part in it,” (Senge, 2004, p. xiii), the opportunity to practice new patterns of relationships through dialogue can help reveal more truth-based change pathways by helping people “not only imagine new worlds, but also to imagine [themselves] differently” (Kaba, 2021, p. 4).

The idea that impact emerges in the spaces where we are reflecting, as much as the spaces where we are doing, was a message repeatedly surfaced by UNDP’s awareness-based programmes. As one participant of the Leadership Certificate expressed, we tend to “juxtapose urgency with slowness without [reflecting on] what it is that we’re moving towards” in part through the ways “our organizational culture is structured.” The ability to practice slower and more introspective ways of being through the UNDP Action Learning Lab had a particular influence on participants’ ability to reorient their connections to themselves, each other, and the systems around them. Some noted as a result a greater capacity to engage stakeholders in more meaningful ways, often translating to greater ability to understand a problem in new ways. As one participant said, “There is this magnificent opportunity... to see their emotions, to talk about what their feelings are. [In] regular meetings [...] we do not go into details [about] the feelings which are linked to those problems.” Participants also expressed shifts related to the ways they approached roadblocks or blind spots when addressing complex challenges. One noted, “I always thought I was a good listener, but I [learned I am] a dreadful listener. Because I filter everything according to my own templates.” Another observed, “Taking a step back and listening to where the system seems to be refusing the change and understanding where it’s coming from [...] has helped.”

From Reliance on ‘Objective’ or ‘Neutral’ Data → To Understanding the Role of Power in Knowledge Systems and Construction of Neutral Truths

The Divide Between Theory and Practice

When development planning is geared to elicit immediate ideas that can easily translate to action plans, little space is left to attend “more carefully to the processes by which we create our plans and intentions,” which is what enables stakeholders working to address issues for which there is no blueprint or silver bullet solution to “develop greater capacity to know what to do” (Wheatley, 2006, p. 155). While there is increasing use of innovation methods meant to help understand systems—for instance, to sense the dynamics of systems, reframe perspectives, expand data sources, and identify signals of change (UNDP, 2022)—these processes are often detached from a deep examination of the role of power and history in influencing the frames for arriving at knowledge and understanding, preferred narratives of the future (Milojević & Inayatullah, 2015), or modes of data considered relevant to an issue. As Giroux (2021, p. 22) articulates, “there are few institutions left that enable a collective consciousness capable of developing a critical stance, engag[ing] history, and hold[ing] power accountable.” This in turn impedes arriving at holistic understandings of social, economic, political, and ecological systems and effective levers for change within them, because power is a critical part of the landscape from which truth manifests.

Levers for Change Through Dialogue

One critical role for more intentional dialogue design is to help practitioners look at the ways that knowledge is constructed, recognizing that “knowledge is always produced through power” and that a disparity lies in the ways that non-Western embodied experiences are often categorized as culture as opposed to knowledge (Sengupta, 2022, 09:02). The process of colonization works by devaluing the knowledge of some and debasing certain cultural practices, which continues in present day systems (Adyanga, 2014, p. 80). Consultative fora that claim to be inclusive by drawing from and learning from groups like Indigenous communities, for instance, without centering the protocols or governance methods by which such communities arrive at shared knowledge, repeats “patterns of behaviour and decision-making that continue processes of extraction and erasure” (Brown, 2022, p. 10). Shifting the protocols for dialogue processes to embrace different ways of being and knowing offers pathways to better address the “fundamental defects in the knowledge system that defines today’s world” (Arbab, 2016, as cited in Karlberg, 2020, p. 7). Dialogue processes that disregard the role of “bodily ways of knowing [in] contributing to genuine knowledge,” for

example, reflect a form of exclusion by rooting dialogue practices in singular, often Western, philosophies about knowledge creation (Dell, 2021, p. 1).

While the UNDP dialogue series and learning labs may not have immediately radically transformed the knowledge practices they brought to their work, they did create the space for many to acknowledge the limitations of existing processes to enable truly inclusive collective intelligence: an important foundation for change. A participant from the Action Learning Lab, for instance, noted, “I’ve seen many initiatives that bring in people from the Global South, but we need to bring the thinking from the South, not just the people.” More broadly, the incorporation of the arts—in the form of music and visual scribing, among other elements—woven with reflective moments allowed many to drop into different states of thinking than normally experienced in formal meetings. One practice helped participants engage movement and touch to identify new opportunities for the future by inviting them to use physical objects to build ‘sculptures’ of the systems they were exploring, then physically moving around to literally and symbolically shift their perspectives. Many noted the ways engaging different senses as part of their reflection, whether with music, visualizations, or the chance to play and touch, helped them share more freely or view their situations with different eyes. Such experiences helped reinforce, or at least open people to the idea, that gathering data about complex systems and what to do about them is not merely an intellectual exercise but requires learning to engage different ways of knowing.

From Identifying the ‘Right’ Technical Solutions → To Co-creating the Wisdom and Capabilities that Enable Continuous Learning

The Divide between Theory and Practice

Development that does not only focus on combatting harm but also advancing actions that build radically different worlds starts, in part, with having a compelling vision of those alternate worlds. Shared future visions, coupled with recognition that the world as it structured now is not a given but already “fundamentally structured by the social imagination,” help direct actions and the focus for learning from them away from validating existing assumptions about the world, towards that which lays the foundations for the formation of new worlds (Oldham, 2021, para. 11). While there exists some efforts at bringing imaginative thinking into policy processes, its impact continues to be hindered by limited efforts to seriously invest in the related work of “creating the ‘container’” in which people can actually “explore together each other’s visions and start to see the emergence of something beyond their individual vision” (Eisler, 2015, p. 5). Likewise, where diverse imaginations and hopes for the future are already elaborated by communities or even collected as part of a development planning exercise, they are still rarely incorporated as legitimized data points in the

decision-making of national policies and programmes, because they are not accompanied by efforts to evolve the institutional culture (Dhar & Aurora, 2022).

Levers for Change Through Dialogue

Often, development dialogues rely on statistical data or insights from past or existing approaches to inform what needs to happen in the future, in part because they do not invest in the conditions that allow people to think and act in more future-oriented ways. It is also important to situate evidence or data within the relationships from which they were forged, including culture and value systems. The warm data movement highlights that reliance on “information without interrelationality” can lead us to conclusions that “further destructive patterns” (Bateson, 2018, Warm Data, para. 5). To help combat this, dialogues might be grounded more firmly in “technologies of humility” (Jasanoff, 2007, p. 33). This means “disciplined methods” that enable people to work with the limits of scientific knowledge, such as those which guide groups to reflect on the sources of complexity and ways to “reframe problems so that their ethical dimensions are brought to light” and addressed (Jasanoff, 2007, p. 33).

Another important aspect of navigating uncertain futures and creating new systems is understanding what societal capabilities are needed and how people develop them. Some of the capabilities most vital to transformation processes, such as innovation, creativity, and flexibility, do not merely come about through individual training or skills-building alone because “different settings and people evoke some qualities from us and leave others dormant” (Wheatley, 2006, p. 35). Within the UNDP case study, more than the introduction of new tools and concepts, the relational containers offered by the dialogues helped create a sense of psychological safety that encouraged new behaviours. They acted as microcosms of cultures that valorized norms like openly embracing failure as part of the learning process, asking hard questions as part of transformation, and sitting in shared vulnerability with colleagues as a foundation for building enabling ecosystems for change. One participant observed a kind of generative letting go emerge through the process, noting “I am giving myself completely, I am taking risks, approaching others as equals, showing my fears, learning from everyone.” Experiences like these of participants in the Action Learning Lab suggest that emotions are triggers for decision-making and as such, they should be engaged with intentionality to expand systems leadership capabilities. In this, the work of building new capabilities for systems transformation is as much a process of building new fields of belonging and safety as it is an individual and inner learning journey.

Addressing Gaps in Where, How, and Why Dialogue-based Change Approaches are Applied

Many dialogue-based development processes exist to fill the gaps of international and national institutions, with actors “establishing norms and coordinating

action without the coercive power or hierarchical forms that are characteristic of government-led institutions or initiatives” (Pruitt & Waddell, 2005, p. 2). While often easier to establish more inclusive and process-based orientations to change outside of highly bureaucratic institutions, or assert their relevance in contexts characterized by conflict and urgency, the UNDP case is one that explores the possibility of seeding openings for these shifts in contexts that are not primed for embracing these orientations, or may even be resistant to them.

Three strategies from UNDP’s learnings might be considered here:

1. Exposing practitioners to the experience of more awareness-based systems approaches at the micro level, while continuously helping them see the links to the macro.

Part of the barrier to scaling more mindful, awareness-based, and relationship-centric approaches to systems change is a conceptual one. While global evidence for the utility of these models exists, few theories of change in traditional governmental or multilateral development processes explicitly draw the links between small-scale, interpersonal, or inner modes of change, and the changes sought at the macro structural, programmatic, or policy level. Without shared frames to name or effectively visualize these relationships, it remains challenging to systematize, scale, measure, or valorize their effects as substantive drivers of change of equal and interlinked significance to more financial, material, or technical development inputs.

Section V may be seen as one simplified example of this conceptual dot-connecting work, particularly using a given institution’s own rhetorical ambitions as a frame for positioning the outcomes of a dialogue process. These types of analyses can likewise benefit from the growing adoption of development frameworks aimed at measuring for shifts in intangible qualities and relationships. Models such as Outcome Mapping (Earl et al., 2001), for example, among many others can help to make possible more adaptive and relationship-based, rather than material outcome-based, guides to development investments, action, and learning. However, a core challenge remains in creating openings for the use of such frameworks in the first place, in ways that can gain traction within prevalent development logics.

While there is no singular solution, the UNDP experience in working to create these openings and attending to the challenges as a continuous trial and error process suggests that much more context-specific experimentation and research is needed that focuses on which strategies help to valorize the use of such approaches. One approach might be in linking the ‘soft’ with the ‘hard,’ by placing the intangible outcomes of generative dialogues within conceptual frames from social innovation that elevate the role of relationships as “infrastructure” or “containers” that shape how individuals and societies co-create knowledge and drive *how* they interact with the world based on that knowledge (Rye, 2023; Dark Matter Laboratories, 2022; Imagination Infrastructures, n.d.; Eisler, 2015, p. 5).

2. Leveraging dialogue among the facilitators, conveners, or norm-setting bodies to help the system see itself.⁵

While development organizations may invest in interventions targeting social relationships and mindsets, many tend to focus on helping ‘beneficiaries’ of development programmes build social capital, bridge social divides, or interrogate norms. They are rarely turned inward, however, to examine the links between the harmful cultural norms ‘out there’ and the ways they are perpetuated through the very dialogues and decision-making protocols that shape policies and programmes meant to address their effects in societies. Moreover, despite some recognition that intervening at the level of process, relationships, and paradigms is fundamental to work that aims at transformation of systems, there remains little consensus about how best to intervene at this level.

The UNDP Leadership Certificate gave senior leaders access to consistent collective spaces and processes to work with alternative tools and approaches in ways that went beyond thinking about what they themselves might change in their offices or support to governments and other partners, to thinking about the systems they and their counterparts were a part of. It encouraged reflection of what might need to be confronted or disrupted in order to make the systematic application of those alternative approaches possible in their contexts. They considered more seriously the *network-building, culture-shaping, and ecosystem-evolving work* that must accompany their own transformation and what roles they might play.

For example, one country-specific dialogue initiative inspired by the Leadership Certificate sought to reimagine a longstanding dialogue between government, private sector, and Indigenous populations on mitigation of social and environmental harm from extractive industries in the region by infusing methods to encourage trust, play, and divergent thought. The types of honest reflections on power imbalances elicited through the creation of this safe space compelled UNDP co-conveners to consider more meaningfully “which cultures [they were] promoting” and “whose concept of time” was being prioritized by the dialogue format and approaches. It even surfaced reflections on ways that protocols can be rooted in “processes of colonization,” and how UNDP, government, or other stakeholders with power might be coming in “with a concept of how human development can look.” While resolving deeply entrenched power structures takes time, the reflective space to acknowledge their existence reaffirmed the significance of taking the time to properly “develop the soil for dialogue” as a precondition for this.

⁵ Inspired by statement from Otto Scharmer that “The essence of Systems Thinking is to make a system see itself.” (<https://twitter.com/ottoscharmer1/status/987424211663818752>)

3. Approaching capacity building as a function of relational infrastructure, rather than individual skills or tools alone.

A dialogue-driven approach to systems leadership or relational infrastructure-building may help disrupt the largely Western, colonial-influenced ideologies that depict inner transformation or mindset and behaviour shifts as a primarily individual endeavour, rather than something inseparable from social conditions and context. One aspect of this includes rooting development in a praxis that is more responsive to the fractal nature of systems. Given that all actions by individuals arise from “conversation that generates, coordinates, and reflects those actions” (Ogden, 2015, para. 1), large-scale systemic change starts with “small groups of people in unlikely combinations in a new quality of relationship” (Tippett & Lederach, 2022, 07:30). Making shifts in how space is designed and held entails paying attention to “how we are at small scale” and learning to live our solutions locally, such that we can better know what is needed to implement a just governance system regionally, nationally, or globally (Brown, 2017, p. 55). This notion applies as much to the many localities of culture that exist within a development institution as it does to society at large.

While theories that posit that organizations change because “there are a few people who are willing to take a stand [...] for a process which is open-minded and open-hearted—for carving a better future” (Kahane, 2007, para. 13) may stand relevant, the UNDP approach which started from a place of seeing individuals’ consciousness and motivation as inextricable from the influence of their social fields also recognizes that this “willingness to take a stand” can be built through the cultivation of like-minded networks and microcosms of new culture. The experiences also underlined that there is often a divide to be addressed between an individual’s interest in a certain paradigm or framework for being and doing, and their translation of that interest into action. As described in section V, this is not just a function of skills gaps, but often of *poor relational soil or infrastructure capable of inspiring the confidence to act amidst uncertainty or risks*. This is particularly critical for transforming bureaucracies, as attempts to alter ways of doing business or invest in transformative dialogue processes may clash with entrenched ideas about value for money, efficiency, or definitions of data and impact for development. Since shifting the core structures that guide the work of institutions takes time, the intermediate work of shifting mindsets and creating openings for different patterns of doing inherently comes with reputational, financial, social or other forms of risk, with different implications depending on individuals’ relationships to power. The work may not be rewarded or validated by the current structures, rendering alternative incentives like shared power-creation, psychological safety, a sense of belonging, and other relational aspects borne of these microcosms within larger institutions all the more significant to sustain movements which can in time transform culture and structures.

Conclusion

This paper has sought to elucidate, through UNDP's learning journey to apply transformative dialogue tools and approaches to complex development challenges, the crucial role of levers for change that target the relational aspects of systems transformation. By centering dialogue in particular, there is immense potential to help development practitioners and other change agents better understand the reciprocal relationships between internal change and societal and institutional changes. While more development discourse today is recognizing the significance of individual transformation to the achievement of the SDGs, the ways that individual consciousness and creativity is shaped by context, culture and human connections means more learning is required to build and maintain the social structures for collective sensemaking, dialogue and decision-making with this relationship in mind.

Steering large bureaucratic institutions with entrenched mindsets and modes of operation towards more dialogical-based processes remains challenging, however. Initiatives that alter the mindsets and capacities of individuals alone have often proven insufficient to alter the core modes of operation in favor of more transformative processes. An important part of the work includes expanding spaces within development institutions and governments to collectively understand, acknowledge and test strategies to address barriers that lie in normative perceptions, organizational culture, and accountability frameworks, which impede the rhetorical interest in inclusive and transformative dialogue from translating to more process- and relationship-centric business models. Building from the UNDP case study, the paper explored some pathways by which conceptualizing and convening dialogue differently might support practitioners to tend to divides between the rhetoric of systems transformation and predominant ways of working. Its analysis is framed by my own involvement as a co-designer as well as participant in these processes, offering a lens that connects multiple modes of learning, including experiential, as resonant with the themes of the paper.

Situating more attention and learning in the ways that mainstream development institutions could better hold space for collective being and thinking may help cultivate a development praxis that is rooted in the ability to recognize our own assumptions about, roles in, and relationships to the systems we work on changing. It gives more weight and visibility to the role of social containers in systems change processes, and the idea that impact emerges in the spaces where we are reflecting, as much as the spaces where we are doing. In other words, in shifting the lens of where development impact sits to encompass the spaces where culture, shared thinking, relationships and consensus are built, new openings emerge to better attend to what goes into the co-creation or collective intelligence process itself. More emphasis is placed on the 'how' of development, beyond the 'what.' This shift makes possible more investment in efforts to co-design and practice the tools of the heart and mind, as what give meaning and

power to the tools of the hand, such as programming methods, formal structures, and financial resources.

While the disconnect between mainstream development approaches and the scale of transformations needed remains vast, the growing focus on initiatives aimed at shifting our ways of relating to each other and ourselves, as central to how we understand and work on systemic challenges, is a promising move towards bridging the divide.

The views expressed in this paper are those of the author and do not necessarily represent those of the United Nations, including UNDP or the UN Member States.

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Book Review

Beyond the Limits of Modernity Toward Enlivening Futures of Blessed Unrest and Complex Joy

A Review of *Routledge Handbook for Creative Futures*, Edited by Gabrielle Donnelly and Alfonso Montuori Earthscan from Routledge Abingdon, Oxon, UK, 363 pages.

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Abstract

When the world is on fire - from wildfires induced by climate change to bombs fueled by fires of fear of “others”—how dare we dream of flourishing futures for all? As we reflect on the lessons of COVID19 that are indeed still unfolding, how can we spring forward into co-creative, life-affirming futures rather than bouncing back into business as usual? Confronted by apocalyptic atrocities, how can we move beyond the paralysis of [reasonable] despair into active, [unreasonable] hope? Co-creative, enlivening futures are possible, and the *Routledge Handbook for Creative Futures* (hereafter “Handbook”) equips us with a navigation guide to meet the polycrises of our times with grace, courage, and compassion. Tenderly curated and edited by Gabrielle Donnelly and Alfonso

Montuori, the *Handbook* assembles over 50 diverse voices across 37 chapters to provide principles, practices and processes that enable co-creative future-shaping. The *Handbook* asserts that humanity can reimagine “creative futures” beyond the limits of modernity toward futures of collective flourishing through pathways of blessed unrest and complex joy. The *Handbook*’s voices include “a mix of Indigenous, Black, Asian, and White/Caucasian contributors, including women, men, and trans people from around the world” (2022, p. 5). These contributors ground a diverse array of visions, theories, and frameworks in personal stories, case studies, and pragmatic practices that help readers like me responsibly engage the tensions of these times as we dream and enact alternative, life-affirming visions together, and move from an abstract Age of Enlightenment into an embodied Era of Enlivenment.

Keywords

co-creation; awareness-based systems change; embodied wisdom; regenerative leadership; (r)evolutionary power; radical imagination

Introduction

When the world is on fire—from wildfires induced by climate change to bombs fueled by fires of fear of “others”—how dare we dream of flourishing futures for all? As we reflect on the lessons of COVID-19 that are indeed still unfolding, how can we spring forward into co-creative, life-affirming futures rather than bouncing back into business as usual? Confronted by apocalyptic atrocities, how can we move beyond the paralysis of [reasonable] despair into active, [unreasonable] hope? Co-creative, enlivening futures are possible, and the *Routledge Handbook for Creative Futures* (hereafter “*Handbook*”) equips us with a navigation guide to meet the polycrises of our times with grace, courage, and compassion.

Tenderly curated and edited by Gabrielle Donnelly and Alfonso Montuori, the *Handbook* assembles over 50 diverse voices across 37 chapters to provide principles, practices, and processes that enable co-creative future-shaping. The *Handbook* asserts that humanity can reimagine “creative futures” beyond the limits of modernity toward futures of collective flourishing through pathways of blessed unrest and complex joy. The *Handbook*’s voices include “a mix of Indigenous, Black, Asian, and White/Caucasian contributors, including women, men, and trans people from around the world” (2023, p. 5). These contributors ground a diverse array of visions and theories in personal stories, case studies, and pragmatic practices that help readers like me responsibly engage the tensions of these times as we dream and enact alternative, life-affirming visions

together, and move from an abstract Age of Enlightenment into an embodied Era of Enlivenment.¹

Personal Introduction

My name is Elizabeth Walsh and I am a scholar-practitioner of regenerative development with an academic and professional background in Community and Regional Planning. I am a commitment to² supporting just and enlivening transitions to futures of mutual flourishing where we all get to be alive, well, and free. I inhabit a white, cisgendered, female body on land traditionally governed by the Mohawk (Kanien'kehá:ka) people of the Haudenosaunee Confederacy in accordance with the Great Law of Peace and the Law of Regeneration in what is now the state of New York, in the United States of America.³

As a field, we planners wrestle with our relationship to progress and creative, utopian visions (Campbell, 2023; Sandercock, 2023). On one hand, we understand that our past pursuits of “progress”—hindered as they have been by paternalistic hubris and adherence with modernist, technocratic rationality—have left a host of “wicked problems” in their wake. On the other hand, we know we cannot afford to give up on possibilities of progress. How can we dream and enact alternative hopeful visions together, responsibly?

The 52 contributors to the *Handbook* ask similar questions. I offer this review to commend this valuable book, and hopefully further dialogue around the synergetic possibilities and creative tensions within its 37 chapters.

Overview

The motivation and timing underlying the *Handbook* contributes to its practical and enduring value. The *Handbook* was generated over the course of a global pandemic (2019-2023) as a direct response not only to the possibilities opened up by this experience, but also as a response to the despair encountered by its editors through their work as educators and scholar-practitioners in creative, future-oriented fields. In their introduction to the *Handbook*, the editors express

¹ Although neither the editors nor the other contributors directly used the words “Era of Enlivenment,” this moniker emerged for me spontaneously as I read this book and reflected on the shifts in thinking, being, seeing, relating, and acting that its diverse contributors encourage to create life-affirming futures beyond the limits of modernity.

² I thank generative somatics practitioner Haines (2019) for introducing this “I am a commitment to” approach for personal declarations as a pathway for embodying desired futures. I incorporate this declaration into my routine centering practice.

³ Importantly, the Constitution of the United States of America was inspired by the checks and balances system of participatory democracy established by the Haudenosaunee’s Great Law of Peace (Akwesasne Notes, 2005).

that they conceived this book in 2019 through their “heartbreaking personal experiences speaking with many young people who see little hope for the future” (2023, p. 1). The more their students learned about limits to growth in the Anthropocene, the more the prospect of dreaming of a better future seemed to be an irrational and irresponsible luxury, weighed against more pressing demands of basic survival. The editors witnessed how their personal experiences mirrored larger societal patterns related to increasing suicide rates among young people, as well as intensifying polarization, proliferation of dystopian tales, and the “absence of political vision and alternative futures” (2023, p. 2).

In response to this personally and collectively experienced crisis of hope and imagination, they set out to co-create a “handbook,” aka, a practical guide for co-creating life-affirming futures for all. They extended open invitations to 85 potential contributors in 2019 to help readers go “beyond the current impasse to bring together new ways—or uplift and strengthen older ways of thinking and action” (2023, p.3) and to “find a sweet spot somewhere between despair and naive optimism, neither shying away from the massive socio-environmental planetary challenges currently facing humanity, nor offering feel-good solutions” (2023, p. i).

Quite remarkably, over the three-year, pandemic-spanning birthing process of the book (2019-2022), the editors and their 50 other fellow contributors co-created a *Handbook* that achieves all of these aims. Although the 37 chapters defy neat categorization and all contribute to bridging theory, ideas, frameworks, and practices for creative futures, the book is structured in five parts that help make it more digestible to readers.

Part I serves to broadly frame concepts of creative futures, distinguishing how this compendium holds “creative” and “futures” in contradistinction to the way modernity and settler colonialism have held them captive. Beyond instrumental and individual creativity and a linear, progressive view of time, this book centers every-day creativity practiced through ways of being, seeing, relating, and enacting compelling, co-creative futures through dialogue and collective action in living systems.

Part II builds on these theoretical distinctions with fresh framings and frameworks that help readers engage, lightly hold,⁴ and harness the co-creative energies of generative tensions in “postnormal times” characterized by contradictions, complexity, and chaos. Consistent with the reality that generative tensions tend to be greatest at the margins of modernity, several contributors lift up contributions of queer studies, disability studies, decolonial studies, and intersectional liberatory social movements to meet this challenge.

⁴ By “lightly hold,” I refer to a common theme regarding the importance of both holding our stories, ideas, and commitments lightly with a self-transforming mind and creating “a light container to hold these difficult conversations without relationships falling apart” (Andreotti, 2023, p. 144).

Part III delves deeper into explorations of time and voices at the margins of modernity, as its contributors reveal how reparative and regenerative pathways for healing intergenerational traumas in living systems are essential for creative, life-affirming futures. Moreover, they share stories and practices to support social and ecological healing, “decolonial forms of sobriety, maturity, discernment, and accountability” (Andreotti, 2023, p. 143), and rematriation—from everyday actions and interactions to structural change.

Part IV’s contributors—19 voices in 11 chapters—share tangible frameworks, principles, approaches, and applications for creative futures, such as equitable and ecological civilization frameworks, universal basic income, scenario planning, the role of art in transformation, the uses of science fiction in future-shaping, the wisdom and power of youth as creative agents of change, and the work of intersectional movements for regenerative economics and climate justice.

Part V’s contributors delve into personal, relational, and collaborative practices for creative futures that we can apply at home—whether the home of our bodies, our organizations, or the places we live, love, work, and play. From somatic practices to awareness-based research processes, contributors offer resources that can help us metabolize guilt, grief, rage, and other forces of aliveness in ways that move us beyond encultured rigidities and fragilities toward co-creative futures of complex joy and mutual flourishing.

Summary of Strengths and Limitations

Routledge Handbook for Creative Futures makes a remarkable and timely contribution to academic literatures, especially for future-oriented and practical fields committed to addressing wicked problems in the 21st century (e.g., community and regional planning and development, social work, public health, social innovation, environmental and sustainability studies, policy studies, organizational management, future studies, regenerative design, etc.).

Not only do the 37 chapters reflect an unusually diverse array of voices working in service of flourishing futures, contributors write in a relational, embodied voice that not only reflects their positionality within existing systems, but also relays practical wisdom developed through their efforts to co-create more life-affirming futures. This stylistic choice is more engaging to read, and disrupts an epistemological bias of many academic publications that privileges disembodied writing styles intended to contribute abstract, “objective,” generalizable knowledge, rather than contributing to contextualized, practical wisdom in diverse communities of reflective practice (Flyvbjerg, 2001).

Most significantly, this compendium is actively hopeful in troubling times. The *Handbook* goes beyond critique to offer hopeful pathways through practices that integrate scientific ways of knowing with the broader human and ecological intelligences required for collective flourishing. Many contributors show how the Enlightenment Era has been complicit in settler colonialism by privileging

production of disembodied, disembedded, and displaced approaches to knowledge creation, directly contributing to apocalyptic atrocities experienced today. Most offer pathways for transitioning from an Era of Enlightenment to one of Enlivenment by empowering creative catalysts of flourishing futures with an expanded navigation kit. Equipped with an abundant array of paradigms, practices, and processes, we are enabled to embody, embed, and emplace our diverse visions of mutual flourishing within the living systems we call home. This navigation kit includes everyday actions of individual, interpersonal, and organizational creativity, as well as transdisciplinary, awareness-based action research methodologies that support transformative systems change.

The *Handbook* further stands out from many academic volumes in that its diverse contributors uplift the wisdom and power of many intersectional movements for liberation and regeneration, both through direct experience and scholarly appreciation. That said, none of the *Handbook's* contributors wrote explicitly from the disability justice movement, despite the essential role this movement has played in supporting visions of mutual flourishing and transformative justice beyond the constraints of modernity's intersectional systems of oppression (Piepzna-Samarasinha, 2018). In their introduction, the editors note that over the course of the pandemic more than half the people they originally invited were unable to contribute. I wonder which voices were lost in this process from a representation lens, especially given the health inequities amplified by the pandemic. Interestingly, at least two chapters emphasized the importance of contributions by the disability justice movement and the field of disability studies, yet "disability" cannot be found in the Index.

The primary limitations of the book have to do with making the exceptionally rich, relevant, and diverse content easily accessible to those who wish to use and peruse the book. The first concern relates to a paradox of accessibility involved with academic publishing; the second is the insufficiency of the Index.

The *Routledge Handbook for Creative Futures* embraces something of paradox related to accessibility. One of the things that excites me most about the *Handbook* is that it is an excellent academic textbook that integrates diverse voice and ways of knowing, relating, being, and becoming that tend to be marginalized by dominant academic institutions. Routledge's commitment to publishing this collective work affirms the value and credibility of these voices—thereby making these perspectives accessible to students, researchers, and professors in academic institutions. The flipside of this coin is that wider accessibility to this valuable compendium may be limited by its price-point. The book is currently available for order on Routledge's online store for \$250. There does appear to be a more affordable option for Kindle readers (between \$27 and \$43). The good news is that the publicly available table of contents identifies the *Handbook's* 52 brilliant contributors, most of whom have published works in a variety of accessible formats, including websites, podcasts, and communities of practice.

My second concern is that the *Handbook's* Index is insufficient to allow readers to easily peruse cross-cutting themes and practices in this rich volume. For example, as authors break free of the conventions of techno-rationality and paradigms of white supremacy culture and economic extraction, many explore important human feelings, experiences, practices, and sources of energy and wisdom. In the unfolding of the chapters, thematic words such as grief, anger, urgency, time, tension, paradox, wicked problem, privilege, failure, disability, humility, compassion, gratitude, play, humor, wonder, trust, celebration, ceremony/ritual, liberation, regeneration, death, reciprocity, fear, love, scarcity, and abundance surfaced and resurfaced, yet *none* of these words made it into the Index.⁵ As such, it is difficult to find or compare the ways contributors explored these human phenomena typically obscured and suppressed by techno-rationality.

The Index also had some inaccuracies that were likely due to process breakdowns. For example, page 354 lists “Appreciative Inquiry (AI): 21, 23, 55, 213, 284.” At first glance, it was helpful to see that Appreciative Inquiry is being referenced as a collaborative practice in multiple chapters. However, when I visited these pages, I discovered that only two referenced Appreciative Inquiry (p.55 and p. 284), while the other three pages referenced Artificial Intelligence. Given the complex, interesting challenges that Artificial Intelligence poses to co-creation of life-affirming, regenerative futures, this form of AI deserves an entry of its own. As Ziauddin Sardar discussed in Chapter 2, AI is likely to further trap and colonize our imaginations, even while appearing to achieve breakthrough levels of innovation and creativity. However, there were no entries in the Index for Artificial Intelligence.

Most limitations associated with the Index will, thankfully, be eliminated for those with access to electronic versions of the book. Even so, because so many of the chapters throughout all five parts provide context, practice stories, and other guidance for helpful practices, I do hope the editors consider including an inventory of individual and collective practices in future versions of the *Handbook*—or better yet as a downloadable supplement—to support readers in drawing upon the breadth and depth of contributors’ practical wisdom as they bridge theory to practice.

⁵ In other instances, important themes or terms appeared in the Index but the listing included only a fraction of that theme’s references among contributors. Trauma is one example: this theme was common, but the Index only mentioned it in the context of “sustainable food.” Similarly, fractal corresponds with only one listing in the Index yet the concept was mentioned by several contributors. Additionally, adrienne maree brown’s work was mentioned in multiple chapters, but her name only has one listing in the Index (for the chapter she contributed.) These examples reflect general patterns limiting the utility of the Index.

Moving Forward in Blessed Unrest

In summary, the primary limitations of the book are more a reflection of its strengths than weaknesses. Indeed, one of the most remarkable aspects of this compendium is the way that these 52 voices came together as they grappled with the core challenges of co-creating enlivening and regenerative futures of collective flourishing in a post-modern world.

While reading the entire volume twice through as well as delving deeper into many of its rich chapters, I felt fortunate to be in dialogue with these bright human beings, each engaged in the hopeful, necessary work of creative futures. I also experienced a sense of blessed unrest, as Paul Hawken (2008) described it in his eponymously named book about “how the largest social movement in history is restoring grace, justice, and beauty to the world.” The resonance of similarly inspired voices sharing diverse, complementary ideas and practices often contributed to a sense of inspiring co-emergence and synergy. And, just as importantly, the generative tensions between diverse contributors greatly contributed to my experience and practical insights.

Through my engagement with the synergies and tensions among the 52 contributors, I find that the *Routledge Handbook of Creative Futures*—as a whole more than the sum of its parts—invites us to grow:

- beyond the limits of modernity;
- toward reparative and regenerative economies of fractal flourishing;
- through enlivening transitions of blessed unrest and complex joy;
- emboldened by the renewable energies of (r)evolutionary love for people and place.⁶

These invitations to pathways of blessed unrest offer neither comfort nor enlightenment. Yet, they are guaranteed to afford us the delights of good trouble and being fully alive in our living world.⁷ As Grace Lee Boggs expressed, “A revolution that is based on the people exercising their creativity in the midst of devastation is one of the great historical contributions of humankind”⁸—and this *Handbook* helps us embark on such a (r)evolutionary Era of Enlivenment.

⁶ If you are curious about these themes or how I arrived at them in the course of my journey with the *Handbook*, I offer my personal reflections as a supplementary, self-published essay: bit.ly/CreativeFuturesReview

⁷ I thank beloved community builders John Lewis (1940-2020) and Howard Thurman (1899-1981) for their leadership in embodying these possibilities.

⁸ As quoted in the Detroit Free Press as Grace Lee Boggs embarked on her transition to hospice (Spratling, 2014).

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Innovations in Praxis Article

The Art and Science of ‘Escape’: World Building and Other Leaps Towards Transformation

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Abstract

The authors draw from their experience of hosting two virtual design and imagination labs, where we took a deep dive into the evolution of our economic system with a diverse group, and had a profound collective experience imagining possible alternatives that promote wellbeing and flourishing of people and planet. These labs were convened by the David Suzuki Foundation in Turtle Island/Canada during the pandemic. In each Lab, approximately 60 participants were invited from across government, First Nations communities, civil society, academia, and activism. Both the process of inviting, and the lab design and process, were carefully curated with an intention to bring different world views and perspectives to take a deep dive into re-imagining our economic system. As pracademics and systems change practitioners, we reflect on what is required to make visible the underlying conditions (including worldviews, myths, and metaphors) that keep our current systems in place, and what might be needed to free ourselves to imagine alternatives. We refer to this liberation as ‘escape’ and propose six elements of ‘escape’ for transformation. The process of unlearning

and releasing ourselves from unhelpful limiting assumptions and worldviews applies to those 'facilitating' these processes of systemic change, as much as it applies to those participating in the labs. This form of collective practice requires constant vigilance, as no single methodology or framework is fit for purpose. We reflect on what this kind of methodological pluralism invites and offers, as we bring together different ways of knowing and different knowledge systems, and re-imagine alternatives that recognise the limitations and impact of our current economic system on people and planet.

Keywords

systemic intervention, methodological pluralism, reflexive futuring, second order cybernetics, dialogue and world building, holding in transition

Introduction

When we agreed to write an editorial for this new section of the journal, *Innovations in Praxis*, we did so with the vision of writing a piece that reflected the invitation to authors. That is, we wanted to write about the relational, messy, and evolving dimensions of praxis and give others the permission to be honest, reflective, and unique. We wanted to share our own understanding of what praxis means, but reflect this through illustration and the sharing of our own experience. We also wanted to show what it means to us to work intentionally with concepts-in-practice. So, as our *innovation in praxis*, we have chosen to focus on how we weave the threads of methodological pluralism in order to take up our role of creating 'escape artists' for transformation. Our role is not one of neutral facilitator, but rather as active and constant scanners of signals for readiness. To illustrate this, we start with a journey down memory lane before we focus on a particular case in point. Through this case, we illustrate six elements of 'escape' for transformation—with a goal of liberating ourselves and others from the world-views that tie (and retie) us to the current system and the unleashing of self-empowered 'escapees' and world builders. We hope you enjoy our story which is offered in the spirit of sharing lessons learnt and reflecting on what it means to innovate in praxis.

Origins—Tracing Our Threads

A linguist and a human geographer walk into a bar... Well actually, it was a cafe in Sydney, Australia, back in 2012. We were both navigating the emerging landscape of systemic practice with deep interest, but also with a healthy shared suspicion of adopting particular methods or frameworks like recipes for a cake. We were wary of the flavour of the month techniques and felt that with a depth of understanding of systemic transformation should come an equal depth of understanding about different methodologies and what they bring, and a breadth of tools and techniques to support the work in any given moment. It was in later conversations and collaborations that we also realised that we shared a

preference for (and academic grounding in) inductive reasoning. As an applied linguist (Megan) and a human geographer (Fiona), we were most comfortable when we could develop concepts and frameworks out of the messiness of place and context, rather than the other way around—imposing theory on context. We shared a deep interest in praxis: taking heuristic frameworks and concepts and testing them in contexts of application, always with the intention of creating the conditions for systems to navigate paths that were more just and equitable; ones which contributed to flourishing of people and planet.

In terms of our earlier origins, writing this editorial prompted a discussion of our ‘red threads’—the common themes and connections weaving through from our earlier lives and work. For this, we jump to first person ‘I’:

Fiona:

With the benefit of hindsight, I now realise that some of my most formative early experiences occurred against the backdrop of major economic reforms in Australia. I grew up on a remote fourth generation family farm. Our farm had both livestock (sheep and cattle) and cropping and had flourished right up until the late 1980s. Times changed and it was in 1990 that sheep numbers dramatically peaked across Australia. This was followed soon after by the collapse of the “wool stockpile” in 1991—part of an Australian Wool Price Reserve Scheme. This quickly led to financial crisis and the introduction of the “Flock Reduction Program.” This is a benign term for what was an industry collapse and a government payment program for farmers to euthanise [shoot] their entire herds of sheep. In this program, farmers across Australia had to destroy over 20 million sheep; animals they had raised and cared for. I was 11 years old at the time. One day, I remember my siblings and I being kept inside the farmhouse by my mother and told to stay away from the sheepyards. We could hear bullets being fired from those nearby yards, and the sounds of trucks moving sheep to a mass burial site dug in the ground. I also remember the devastation of my parents. I recall asking, “Why?” The answer I remember is that it was due to the decisions of someone, somewhere, in a capital city down south, that led to the wool price crash. The visible effects of decisions being made far away from home left an indelible mark on me, more so than I realised at the time.

It also taught me two lessons: 1) decisions makers are imperfect, and 2) decisions have lasting impacts and unintended consequences. It is no surprise then that the ‘red thread’ for my academic career has essentially been exploring the question: “Why do decision makers make the [good or bad] decisions that they do?” It was through my PhD studies on farmer-driven innovation, where I dived deep into decision theory, innovation systems,

knowledge networks, and systems thinking, that I came to realise that decision makers are but one part of a complex whole. It was through my work on climate change that I realised that, while capability building and awareness raising can help decision makers think differently, they are also bound by the conditions and feedback loops of the system they are embedded in. And so the third lesson was that 3) there are no 'easy' answers or quick fixes to the troubling patterns of decision making I was witnessing.

The focus of my work moved from understanding human decision making, to developing skills and practices to influence wider system conditions for deliberation and positive social and environmental transformation, as well as decision makers' abilities to think beyond short term consequences towards new patterns and frames. This was never to decontextualise decisions—I learnt early on how dangerous decisions made far from home could be—but rather to find processes that could open the way to new contexts, content, and wisdom.

I began to understand the invisible threads of justice, power, relationships, and purpose that shaped mindsets and to explore how to value and enable different ways of knowing, being, and doing. I learnt that human brains are knowledge generating systems in their own right, within systems which act upon them. In applying grounded theory and studying grassroots innovation, I learnt of the systemic bias in favour of formal research and 'academic experts' at the expense of the lifelong wisdom and experience of farmers. It became apparent that definitions of 'expert' and 'knowledge' were culturally constructed, historically dynamic, and definitely subjective.

Throughout this roaming exploration, I sought to hold onto multiple realities. In my academic studies, I studied the arts (political and social sciences, geography, English, and history) and also science (biology, ecology, and wildlife management) and grappled with the different paradigms within each. I spent several years working on environmental policy [more seemingly crazy decisions], engaging with decision makers in countries on almost every continent through United Nations processes. To this day, working across many different sectors and systems, I still maintain strong connections to the land and farming, whilst living in the city. And I constantly move between the role of researcher and facilitator and content creator and convenor. I am still very much on a lifelong journey where that lasting question of "why do we decide what we decide—and is there any way to escape our own bounded rationality?" remains at the heart of my work.

Megan:

My fascination with bringing together bodies of knowing and bodies of knowledge—and praxis—began in the 1990s in higher education in South Africa. First as a mainstream academic in applied linguistics, and then working on curriculum transformation in the context of post-Apartheid South Africa. In hindsight for me, the interdisciplinary nature of both education and applied linguistics (my post graduate degrees at that point) gave me licence and latitude to work across disciplinary boundaries. And then there was a ripe field for application in the Medical School at the University of Kwa Zulu Natal (now called the Nelson Mandela School of Medicine). At that point in time, the faculty only admitted ‘non-White’ students into what was otherwise a predominantly White university. The School had specifically been established to educate doctors to serve in under-served areas of the country. To that end, only students ‘of colour’ were admitted to the faculty. Half of these students were second language speakers, with up to six first languages comprising the cohort of 120 students admitted each year. The reality was that it offered a classic western-styled Medical curriculum, with a broad introductory first year and two years of anatomy, physiology, and biochemistry crammed into a very full second year, which saw more than half the class failing.

I was teaching Communication and Healthcare to first year students, and increasingly drawn into ‘fixing’ the ‘problem’ of under-prepared/disadvantaged/second language students. The assumption was that building academic literacy in second language students would enable them to engage with the curriculum (and curriculum knowledge). The first prototype was a pre-university program, involving staff in an integrated program, intentionally building language skills in the context of selected themes. The curriculum remained essentially unchallenged. At the same time, I was working with an Education Review Group designated by the Faculty Board to look at the structure of the curriculum (and the entire teaching and learning process). This work was fuelled by national exploration around the need to transform knowledge and what it might mean to ‘Africanise’ the curriculum in the context of the transition to post-Apartheid South Africa.

I had since moved into a full-time role in educational development in the Faculty. It became clear through our deliberations in the Education Review Group that the curriculum was structured in such a way as to continue to marginalise students who spoke other languages, who brought different worldviews and different ways of

knowing, and of engaging with and mapping the world. Rather than preparing students to become lifelong learners (the stated intention) and to serve in under-served areas (the purpose for which the faculty was established), it was perpetuating an unequal and unjust process of education and producing graduates who were no better able to respond to the complexities of unequal health care provision, and many of whom emigrated to the UK and elsewhere on completion. Thus began a process of deconstructing curriculum knowledge and what it might mean for a diverse group of students to engage with that knowledge. We were supported in this radical endeavour by the Vice-Chancellor of the University, who had committed the University to a strategic intent of becoming a learning organisation (influenced by the early work of Peter Senge). Faculties were encouraged to embark on contextualised curriculum transformation—hence the work in the Medical School—and at the same time I was working on a university-wide strategy to become a learning organisation, supported by two of Senge's associates.

The Education Review Group agreed that we had no interest in a 'twin track' curriculum and that it was important to keep the strengths of the current curriculum. At the same time, we recognised that the entire teaching and learning process needed to be transformed to create a learning environment that recognised and worked with diverse languages, knowledges, and lived experience. This required a transformative pedagogy. We co-designed a problem-based curriculum that was also learning-centred and community-based. We agreed that this needed to be an experience for all students and integrated into the four undergraduate years of study. Our first prototype was a 10-week program for first year students organised around the theme of Tuberculosis. The program began with staff and students visiting primary care facilities in rural Kwa-Zulu Natal, travelling in local transport to visit patients suffering from TB. This recoding of the medical curriculum required an unbundling of discipline-specific knowledge in order to make the different dimensions explicit; co-designing a bespoke methodology/pedagogy that incorporated lived experience and other ways of knowing as well as all the relevant dimensions of discipline-based knowledge; and significant co-design of an integrated curriculum, including integrated assessment (knowing how assessment drives teaching and learning practices).

This neat account doesn't seek to obscure the commitment that this required over a period of years from the Faculty Board, the Department of Community Medicine (who convened and provided

the infrastructure for this innovation) and from the 15 medical specialists, scientists, and practitioners involved in co-developing and facilitating the problem-based and learning-centred program. The program was well documented and evaluated, and it was clear from staff that the experience of facilitating profound learning (rather than transmitting knowledge) had a profound impact on them personally and professionally. This experience—followed by five years of curriculum transformation work in the Faculty of Architecture and allied disciplines—deeply shaped my praxis in relation to systemic intervention. Recalling this experience helps remind me 1) what is possible with commitment and collaboratively conceived systemic interventions aimed at bringing together bodies of knowing and bodies of knowledge, and 2) what is required to work structurally and systemically at creating the conditions for change and navigating systemic transformation.

Setting the Scene: Weaving, Bridging and Holding—in Aid of ‘Escape’

In the interests of weaving, we are guided by methodological pluralism. By this we mean we do not slavishly follow a particular methodology or method. It does not mean we are ‘just making things up.’ Both of us seek rigour and precision in sensing the need for and application of the right method for the right time, rather than the strict application of a particular method no matter the context. We refer to our innovation in praxis as the constant weaving of content, context, and practice in order to bridge worldviews and hold spaces for transition. We use the word *weaving* because our work is not about practicing or perfecting a method or process. This word also feels apt given the word *complexity* is rooted in the Latin words *com* (with) and *plexus* (braided or entwined). Our approach is deeply influenced by and builds upon the work of others. And it is strongly informed by our theoretical understanding, including of systemic intervention and the need for ongoing boundary critique in relation to values to build resistance to totalizing ideologies which require a continual reference back to a single truth (Midgley, 2008). We seek to structure for emergence as our goal and see the process as a means, not an end, to this aim (Seneque, 2017). Our intent is to show how our approach to systems thinking and practice is with the aim of bringing our influences alive.

In the interests of bridging, we pay close attention to bridging worldviews. Given our red threads, it may come as no surprise that our shared focus is on creating spaces for us humans, in our shared humanity, trapped in old ways of thinking, to escape the confines of our worldviews. We recognise that in some ways we are pursuing the impossible. Our minds are deeply embedded in and shaped by contexts and bounded rationalities that we can never escape (Simon, 1955). But if we can even free a thought or an idea from the confines of history, we believe we are making progress towards co-sensing and co-shaping the future

that is wanting to emerge (Scharmer, 2009). As Donella Meadows wrote, navigating an interconnected, feedback-dominated world requires looking for long-term behaviour and structure and being aware of false-boundaries and bounded rationality (Meadows, 2008).

In this, we both bring our lived experience. As our origin stories above illustrate, we have lived and seen the ways in which knowledge systems exclude and alienate certain ways of knowing, being, and doing. We also bring shared theoretical foundations in relation to our understanding of how to catalyse and support systemic change as we escape our own bounded rationalities and bring together diverse bodies of knowing and bodies of knowledge. We seek to create spaces where there is room for this difference—for mutualities and for as-yet-unrealised mutual connections. We see language as world making and seek to deconstruct language and make visible underlying assumptions (de la Cadena & Blaser, 2018). We emphasise the importance of deep listening and challenging worldviews in the search for new patterns of meaning (Best & Holmes, 2010; Birney, 2021; Edquist & Johnson, 2005; Kurtz & Snowden, 2003; Lent, 2017; McKenzie & Cabaj, 2020; Ramage & Shipp, 2020; Scharmer, 2009; Schein, 1993; Turnhout et al., 2020; Wheatley & Frieze, 2011). This is part of a broader field of work and we recognise the work of many others in decolonising systems change (Goodchild, 2021; Yunkaporta, 2023).

In order to bring together elements of what we mean by 'escape' for transformation, rather than dissecting all our theoretical influences as distinct from our practice, true to form we have chosen to weave them together in the illustration below. Choosing a case study was not an easy task. Over the years, we worked together on diverse systems change initiatives, from human and planetary flourishing through to food systems, health and wellbeing. So, while we have chosen a case (David Suzuki Foundation, Canada), we have resisted presenting a linear case study story. Instead, we have extracted key features from our work and have presented them here as six elements of 'escape' for transformation. We have categorised them as:

1. Strengthening relationships
2. Structuring for emergence
3. Integration of content and process
4. Deconstructing realities and dismantling constraints
5. Recognition and reconstructing world views
6. Enlivening possibilities

A Snapshot of the Case

During the pandemic years, we co-facilitated two ‘Virtual Labs’ for the David Suzuki Foundation, one in 2020 and one in 2022 as part of the formation of the Well-Being Economies Alliance For Canada And Sovereign Indigenous Nations. Our work was conducted online, in different times zones [Megan in France, Fiona in Sydney; and the participants across Canada/ Turtle Island].

- In 2020, we created a five week ‘Design Lab’ with the goal of initiating a powerful new hub that could be one of the green shoots in the ongoing emergence of a new economic system for Canada and Canadians.
- In 2022, we created a six week ‘Imagination Lab: Northern Woods Summit’ that extended this work and sought to dive even deeper into the mindsets and ways of thinking that were holding the current economic system in place.

In each Lab, approximately 60 participants were invited from across government, First Nations communities, civil society, academia, and activism. This was carefully curated with an intention to bring together vastly different world views and perspectives. In both instances, we were grappling with the reality that the world we live in has been shaped by human ideas and beliefs—and deeply held convictions and unconscious assumptions underpin the dominant way of life. We recognised that the same is true of our economy. It is one that has been built on thousands of years of cultural and financial evolution anchored in the Western world’s ways of thinking. Over the past century, the model that currently drives the economy has become ever more focused on productivity and efficiency as goals instead of means. Entrenched myths and metaphors reinforce a desire for endless development and material growth. Unquestioned narratives underpin our economy and our current destructive trajectories. With absolute trust and authorisation from the David Suzuki Foundation’s Yannick Beaudoin, we were given free rein (within the constraints of the online environment) to put storytelling and world building at the heart of our discussions of the economy—some of the very things that have been devalued in the past.

Strengthening Relationships

We start by paying close attention to how to create the ‘right space,’ ‘container,’ or ‘holding environment’ for the collective to achieve its goals. For some, the ‘container’ is held through a function of a backbone team or convenor roles. For us, the container is not built by individuals. Rather it is a property of the relations with participants, with careful stewardship enabled by constant signal

scanning and responsiveness to context. The 'container' is not static but rather dynamic, ephemeral, and evolving or diminishing depending on that context. This is closely aligned to the definition of social capital, where the container is an intangible socio-cultural space of relationships between individuals (Szreter & Woolcock, 2004). The work then becomes how to help shape this socio-cultural space to enable relationships between individuals that will result in new possibilities.

A key element of this for us is examining and disrupting patterns of power. In order to build and strengthen relationships, we must grapple with the power dynamics that act as barriers to trust (Mooijman, 2023). Readers may be familiar with how theorists of social capital have developed a distinction between bonding, bridging, and linking social capital (Szreter & Woolcock, 2004). We seek to escape the confines of these types of social capital as defined by power, status, and history. Through purposeful engagement, we invite participants to recognise their own power beyond the 'formal' including aspects such as informal, social, knowledge, and connection powers (Norbom & Lopez, 2016). Through the process, we aim to move from a place of respectful 'linking' across a power differential, to the equalising of power dynamics, and the resulting bridging and eventually trust based bonding capital that emerges as participants realise they share much more than they anticipate. Here we are influenced by soft systems methodology and critical systems heuristics—valuing multiple perspectives and the role of power and intractable problems with no simple solutions (Cabrera et al., 2023; Checkland, 1999; Ulrich, 1983,). This 'bridging work' is critical to unlocking a different level of willingness to engage in the often uncomfortable work of 'unlearning' and shared meaning-making.

Woven into Practice

In the design of the 2022 Imagination Lab (Northern Woods Summit), we paid particular attention to the quality and nature of relationships and interconnections and processes to disrupt existing system patterns. To overcome the anticipated tendency to move to debate and point scoring by 'experts,' we opened the Summit with the invitation to engage in dialogue as a deeper level of listening and conversation and to embody principles of humility, curiosity, and creativity.

We were constantly creating readiness rather than assuming this was a given state of being.

In diverse collectives, we are grappling with a spectrum—from those that want to take a radical leap to those that wish to back away from the cliff's edge. Judgement is required to create the right nudge or pause in that moment. We kept re-issuing the invitation throughout the rituals and moments of the convening. Recognising the impatience of some participants to 'get to action,' we emphasised purposeful engagement as a critical action in its own right and reiterated: "If you don't make the time

for a different quality of engagement, you will not get a different quality of action” (Facilitators, 2022).

Two key elements we made visible upfront were power and roles. We encouraged participants to notice the default roles they might typically take up, the tendency to ascribe change required to someone else (typically someone not in the room) and the changes required of all system actors—not just one. In raising awareness of the roles we can take up by default—usually those that are most comfortable to us (for example: critic, expert, editor, activist) we explored the alternative roles that the system or collective might need in that moment. We sought to broaden understanding of what is possible and encouraged participants to look beyond the more typical roles (convenor, advocate, advisor, facilitator, intermediary) to others such as: map maker, knowledge translator, truth teller or ideas mid-wife, to name a few. The aim was to build their muscles and skill in being able to diagnose what is needed and take up diverse roles that support ‘pattern shifting.’

We also introduced some simple Critical System Heuristics as reflection questions in order to raise awareness of the subjective nature of meaning-making and boundary judgements (Ulrich, 1983, Ulrich, 2000). For example, we prompted a discussion of the dominant worldviews that are seen as most legitimate or are most powerful in determining what is (versus what ought to be). We encouraged reflection on who holds the power to decide what counts (or ought to count) as relevant knowledge. We linked this to the idea that knowledge can include perceptions, implicit understandings, unconscious motivations, and behavioural habits. It also includes the practices and traditions we inherit, the values that are implied and the judgements we may not even be aware that we make (Polanyi, 1966).

Finally, we emphasised that different types of knowledge, and different ways of knowing, all have equal validity, and we challenged the westernised concept of ‘the expert.’

Structuring for Emergence

Complex systems are beautifully unpredictable. We tap into this in our design with the idea of structuring for emergence. We are possibly stretching the definition here as we refer to generative emergence as both process and outcome. At its most simple, emergence is a characteristic that basically means that there are qualities of the whole that are not seen in the parts (Cabrera, 2020). These ‘parts’ include relationships, which are not just interconnecting threads, but things in and of themselves.

One interpretation of emergence as an outcome is that patterns of organisation emerge due to the collective behaviour and interactions of agents in the system. These patterns can only be seen by looking at the whole (e.g. schools of fish, colonies of ants, traffic flows). For us, we integrate both—emergence as characteristic and as outcome. We are deeply influenced by the fields of: second order cybernetics—especially the concept of feedback; general systems theory—with its framing of open systems, emergence, boundary and hierarchy; and, complexity theory—with a focus on self-organisation, emergence and nonlinearity.

And so we refer to generative emergence as the process of creating new structures of relationships and interconnections that can potentially generate novel properties and behaviours. Our focus here again is 'escape' and the idea that unpredictable and novel forms arise from emergence (Chandler, 2018). We want to see new 'entities' emerge with properties that seem to be autonomous from the components from which they are created, generating their own rules and logic (Chandler, 2018; Lichtenstein, 2014; Lichtenstein & Plowman, 2009). Just as complex adaptive systems are unpredictable, we cannot predict what these new properties might be. For us, it is both the 'discontinuity' of past patterns and the creation of as unyet imagined future possibilities that we hope for (Polanyi, 2008).

We also draw here on theories of 'knowledge systems,' where learning is a socially enabled process and knowledge is distinguished from information. From a systems perspective, knowledge is both an entity and a process that combines information with experience, diverse contexts, interpretation, and reflection (Balle et al., 2019). It is therefore socially constructed and contextually dependent (Winterton et al., 2014). For knowledge to be 'gained,' it has to be subject to interpretation and then integrated into our own embedded personal knowledge system (Breschi & Malerba, 2001; Ferreira et al., 2020; Midgley, 2000). This interpretation is influenced by perspective (MacDonald, 1998). Changing perspectives can require unlearning what we previously thought we knew—or letting go of a particular world view. Or, as Starbuck (1996) described it, "often, before they can learn something new, people have to unlearn what they think they already know" (p. 725).

Woven into Practice

In the 2022 Imagination Lab, we were conscious of needing to create loosely held 'structures' that would enable new properties or behaviours to emerge because of the interconnections that have been woven. We knew that we needed to design processes that would create the conditions for emergence. We also needed to challenge traditional siloes of expertise and organisational boundaries (Clarke et al., 2019). We did this by:

‘Making space’ for self-organisation and un-learning through learning circles that were question driven, rather than ‘discipline’ or ‘topic’ focused.

Including feedback loops through interspersed ‘plenaries’ and the inclusion of experimental approaches to deliver rapid feedback from diverse sources (seeking and analysing data from the wider system through assumptions testing and rapid prototyping).

We offered learning circles as spaces for creating new stories and paradigms. The learning circle journey was framed by a loose structure, offered as optional ‘scaffolding’ to support the collective work. Groups were formed based on participants responses to the question: What is the ‘imagining’ you want to do? A suggested (but optional) process for groups was proposed that included the steps of developing a framing question, identifying and testing critical assumptions, and then developing a north star for their future world. They were also invited to incorporate rapid prototypes (stories, poems, visuals, soundscapes, scenarios, metaphors) as process or product to embody the essence of their ideas.

Importantly, learning circles were self-organising and participants were invited to drop in and out of circles as they desired. Learning circles evolved organically and demonstrated emergence in action. At the start there were 11 circles and this eventually self-organised into five circles focused on:

- Regenerative, healing, connecting spaces
- Collective and inclusive leadership
- Well-being as a centre of economies
- Reimagining governance
- Reclaiming (restoring) the narrative

Deconstructing Realities and Dismantling Constraints

As mentioned above, creating spaces for ‘unlearning’ helps to enable the ‘deconstructing realities and dismantling constraints.’ So too does a shift in focus towards the deep structures and underlying conditions of the system—such as mindsets, institutions, and behaviour—the things that can hold a problem in place.

We see our role in supporting participants to deconstruct patterns and unpack conditions as one of accompaniment. We seek to increase their notice of these patterns, whilst also recognising that we too are part of the system. Another critical element of our work is experimenting with processes for meaning-making, exploring alternate world views and making space for different realities.

Learning circles are one way to enable this (as described above). However, for the process of 'unlearning' to occur in a collective, we also require a way to hold different views and different ways of being at the same time, and for multiple perspectives to co-exist. We must also allow for experimental action which enables new application and adaptation (Hsu & Lamb, 2020; Reese, 2020).

For this, we turn to co-inquiry and dialogue. Dialogue as a practice is about paying attention to patterns of conversation and moving from more closed to more open modes (Scharmer, 2003). It is about engaging intentionally with the goal of increasing understanding, addressing problems, and questioning thoughts and actions. Dialogue, unlike debate or even discussion, is not about reaching agreement or 'winning' the argument (Romney, 2005). Rather it is about moving beyond polarization and thinking together in relationship. Importantly, it is a means for accessing the intelligence and coordinated power of groups of people (Isaacs, 1999). As this greater 'group intelligence' emerges, so too does a deeper level of collective understanding (Kabat-Zinn, 2006). Our orientation to this approach also draws upon an 'innovation systems' perspective, where innovation is the outcome of relationships between various actors who recombine knowledge to achieve positive novel changes (Felton et al., 2010; Klerkx & Leeuwis, 2008; Spielman, 2005).

Woven into Practice: For both the 2020 Design Lab and 2022 Imagination Lab, we relied upon dialogue as a key scaffolding and means to create the conditions for emergence. This was particularly true for the 2020 Design Lab where, given the thousands of years of history that has led to current economic thought, we believed that each session would need to 'liberate' participants and build their capability in the thinking and doing of systems transformation. We needed to integrate content and process, and so the 2020 Design Lab emphasised co-creation through generative dialogue. We drew deeply on Theory U (Scharmer, 2007) in the design, emphasising the importance of co-initiation and co-sensing. We also drew upon systems and design thinking to scaffold what were essentially prototypes in process, ways of thinking and producing.

To help build readiness, we shared some of the desirable behaviours of dialogue, including content from Schein (1993) and Isaacs (1999) on listening without resistance. Our message to participants was that fragmentation doesn't exist in the world—it's a function of our thinking and, as Bohm (1996) wrote, dialogue is the vehicle for the art of thinking together and building coherence. We emphasised the asking of questions as a dialogue superpower. We also reminded participants that we were seeking to engage with a plurality of expressions of wellbeing economies and were asking for creativity, not consensus. Our invitation was for participants to "let go of certainty" and enjoy exploring new possibilities through co-inquiry—where a core group explores, tests, and builds understanding of all the elements of the complex issue they are considering.

Given we were delving into the realm of economics, it was acknowledged that traditional experts had a role to play. However, we intentionally only invited a handful of economic experts to each Lab. This was to give space to diverse participants from government, civil society, and community. We wanted to recognise that all human beings live in connection with one another and are deeply embedded in and shaped by the economic system. So all have a critical role to play. Indeed, our provocation was that the economy is too important to be left to economists. Helping participants to see that many viewpoints are legitimate and need to be present was a first step.

Specifically, for the 2020 Design Lab, with the goal of helping participants to 'loosen the constraints' of epistemological and ontological bindings, we intentionally provided simplistic provocations. The first dialogue question was framed around "thousand year old stories, myths & metaphors" and that "the seeds of the future are in the present." We asked "where are you seeing new narratives emerge as seeds in the current system?" The second dialogue was framed around systems purpose and "What could a radically reimagined purpose be?" Finally, we asked "What is an outcome you 'barely dare' to hope for the We All Can hub?" to welcome the 'crazy ideas' and more radical aspirations for the future. Homework for participants was to "develop the narrative that is meaningful to you." We invited songs, poems, cartoons, or 'tall tales' around the outcomes they imagined. We offered a simple 'once upon a time' template as an optional starting point—wanting to show that it is possible to 'escape' the dominant paradigm and think beyond the current system whilst reducing the intimidation factor.

Recognition and Reconstructing World Views

World building in our minds is shaped by many factors, internal and external. Finding ways to consciously appreciate and work with world building and meaning-making is critical to our work. Interestingly, while systems thinking can help make visible the interconnections across a system, we have found that participants who come to realise this complexity can end up feeling overwhelmed, immobilised, and disempowered. As a way of releasing agency, as well as a way of identifying powerful leverage points, we have found that other theoretical lenses beyond systems thinking and processes such as reflexive futuring and rapid prototyping can help to build a bridge between the 'zoomed out' enormity of complex systems and the 'zoomed in' focus required for intervention points.

Our choices on process and methods are influenced by the degree of entrapment that participants feel (or exhibit) and the anxiety and fear that can accompany this awareness. In explaining our approach, we recognise that this will resonate for many practitioners. Again, futures thinking is not new and has

evolved over decades from across a range of fields and disciplines. Our innovation is in the weaving of the threads.

In the reflexive futuring field, we are influenced by a diverse range of authors and works. Examples include the work of Sharpe and Hodgson on developing a “future consciousness” and building awareness of the future potential of the present moment in order to create the futures we aspire to (Sharpe et al., 2016; Sharpe & Hodgson, 2019). We also frequently draw on the six pillars of futures thinking (mapping, anticipating, timing, deepening, creating alternatives, and transforming) as proposed by Inayatullah (2008).

At this stage, there is also a need to create a new ‘scaffolding’ for insights generated. The challenge here is to avoid returning to current worldview framing and to also enable tacit knowledge to emerge. For us, the use of a powerful metaphor has proven one of the most effective ways to reconstruct insights and hold these insights as future possibilities. Sometimes we draw upon simple well-known metaphors in systems thinking such as the ‘iceberg.’ Other times we have used different metaphors to suite the context, such as a kitchen or forest.

Woven into Practice

In thinking about the future, it is typical of the human mind to extrapolate from historical patterns. Breaking free from this logic can require a structure that helps to bring possibilities to life in a different way. Again we use the 2020 Design Lab as an example. Here we used a simple ‘futuring’ activity called “Over the hedge” which is modified from Inayatullah’s (2008) final pillar of Transformation. Our framing was:

“... It is five years beyond Covid and the world has changed...WE-All CAN has had a powerful impact. Remember all those economic purposes we imagined? Many of these have come to life and been realised. We are seeing locally designed and interconnected systems across the country. The strong narrative we developed and the impact that the Hub has had (in local contexts and across the country) means that Turtle Island has become a living example of wellbeing economies globally.”

We asked participants to then capture their responses using images, pictures, metaphors, or words and to “paint a picture of this preferred future.”

- What does it look and feel like? What can you see and hear? How does it function?
- Now coming back to the present: How did we get there? How did we build on the strengths and opportunities in the existing system(s)? What were the key obstacles we needed to overcome?
- What did the first two years look like?

In coming back to the present, then two years into the future, we weaved in the three horizons model. Our goal was to help participants navigate complexity, both through the practices of futures thinking and the identification of leverage points (Meadows, 2009) and systemic interventions (Midgley, 2000).

In the 2022 Imagination Lab, we also tapped into a “diversity of imaginations” in a range of ways. This included activities such as:

- *Imagining new narratives* – where participants undertook a visualisation exercise and were asked to “Imagine a wellbeing economy that meets your needs. Try visualising this as a landscape.” They were invited to draw, sketch or create however they wished.
- We also held an interview with a time traveller from 2050 (with Yannick Beaudoin role playing himself from 2050) – where participants could ask questions of what was the world like then (this led to questions on everything from the future functions of the nation-state through to questions about the existence of regional currencies).

To enable integration of collective insights, a rapid synthesis process saw participants generate and explore their findings as the layers of an iceberg. This iceberg became a key piece of co-created content but was largely a call to cognitive reasoning. We also wanted to hold space for different ways of knowing and the emotions and inquiry that drove participants in the Lab. We decided that a short film would help to capture this essence much more effectively than written words. The film was created with participants shortly after the Lab and is a powerful capture of the questioning and yearning of participants, rather than a set of answers or solutions¹.

Enlivening Possibilities

It was Shackle (1974) who said, “When we ask whether some particular thing is possible we are asking about our own state of knowledge and thought.” In this work he was reflecting on the human predicament in choice and action— incomplete information and uncertainty balanced by hope and imaginative reach. We are limited by our perception of reality as much as our actual realities. It is why this step is so critical. It is about creating the conditions for people to step

¹ Short film available at: <https://youtu.be/JeqbYYzEEc?si=vIdOBXJzdYs4nS8l>

into their own possibilities and their own self-organisation. It is about pairing futuring with agency.

We seek to 'enliven possibilities' in practice by creating and sustaining the spaces for learning and experimentation that can take the seedlings of possibilities and let them grow into something new. It is in this moment that inductive reasoning and exploration is so important. It liberates participants to generate their own new pathways, connections, conditions, and innovations. This is also the part where the participant truly becomes an 'escape artist.' Yes, they can see beyond the trappings of the current system. Now the challenge becomes not only seeing it, but having hope that they can and will escape it. In an era where we are taught to be so distrustful of inductive thinking, emergence, questioning beliefs, or creating our own imaginary worlds, we have sought to unleash these respective strengths on participants so that the collective can help itself break free. Fostering imagination, building, and relationality and inquiring into the metaphysical is not incidental. It is central to the work of building agency and action of a different kind.

Woven into Practice

In the 2020 Lab, for the final plenaries in this series, with all 60+ participants, and guest David Suzuki, we focused on the action-enhancing architecture that would support the emergence of a new economic purpose. Smaller groups enabled the space for dialogue, dreaming, and diversity of perspectives.

Having synthesised the key outcomes and themes emerging in the first deep dive, we played these back to participants and asked "What do we mean—and what 'work' might be needed—to see radical paradigm shifts become reality?" Participants could choose any of the following breakout groups, each topic having come from earlier dialogues:

1. Rediscovering the commons
2. Getting beyond our bubble
3. Diversity, pluralism and different ways of knowing:
4. Imagining a different reality
5. Engaging with power
6. Redefining wealth and wellbeing

In reporting back, we didn't ask for a recap of conversations. Instead, we asked, "What new meaning did you discover? And what does this tell us about what's needed and what's possible?" We then moved to integration and "action of a different kind." Drawing inspiration of Stewart Brand's *Clock of the Long Now* (2000), we asked "what is the "fast and slow" work of the emerging Hub?"

In this session, we took up a ‘mapmaker’ role ourselves, playing back a roadmap that synthesised the visions, principles, processes, and questions that participants themselves had raised. We challenged participants to consider: What is the basis or grounds for deep action of another kind? We shared Christopher Alexander’s (2002) soufflé metaphor: “When we cook a soufflé, we generate the soufflé by initiating transformations between eggs, butter, sugar, and so on: we do not try to build it” (p. 180). And we asked:

- What are the key ingredients that need to be brought to the table?
- What are the interactions amongst these ingredients that need to be transformed?
- Who needs to be brought into the kitchen to bring these ingredients together?
- How will we bring them in?

In the final session, we again played a mapmaker role, drawing out of all the conversations to date the participants most deeply held questions across all cohorts. These shaped the work of this final dialogue and participants could choose to join any breakout group:

- Building new narratives - How do we retire old narratives? How do we bring in the new storytellers?
- Holding the circle - How do we gather? How does the hub become a safe place to sit in circle and allow for trust and belonging and exploring? What would our ceremony be?
- Co-creating more widely - How do we start to create the collective visioning and narrative work with a diversity of others in an inclusive way?
- Building on what already exists - How do we learn from what has been done, what moves people, and what has been missing to date?

Reflections on Innovation and Impact

As we stated in the introduction, we do not see ourselves as neutral facilitators but rather as active and constant scanners of signals for readiness and transformation. We believe that we too, not just participants, are transformed by the process. For us, recognising and taking up this role includes weaving methodological threads to respond to context. This is perhaps our greatest claim to innovation. When we take up this role, we are committed to presencing, observation, and coherence. It is our intention to ‘hold the whole’ in the service of purpose. Methodologies are our tools and it is the participants, not prescriptive processes, that direct movement. That is not to say anything goes, but rather that careful judgement and constant sensing into the moment is needed. It is also not to dismiss adherence to a single methodology when appropriate. We by no

means ascribe to a single 'correct' approach nor one-size-fits all—not even when it comes to methodological pluralism. We would encourage careful sensing and judgement for any choice.

This is why we are constantly drawing upon the live questions that are emerging in the moment as our frame for the work. We hold lightly any structure that is imposed before we start. And we weave the container without labouring the threads. We might draw from futures thinking, poetry, and film. We might focus on testing boundaries and critical assumptions, or we might work on narrative development and world building as a creative collective endeavour. Our key message here is that the innovation is contextualised, momentary, and repeating in iterative loops. One framework is never enough. And multiple realities will always be present. It is our role to give space to their expression.

Do we always succeed at this? Our learning is that we can always get better—we too are unlearning and innovating always. In the case of the David Suzuki Foundation work, participants reported that they felt liberated to both call for a transformation in our dominant economic 'operating system' and in the task of imagining and creating the new paradigm—not just deconstructing the old. As part of closing sessions of the Lab, we sought feedback from participants. Some of the comments included:

“We are being in collective practice together, starting with a shared vision, but letting go and remaking that vision as we go, always moving” (Participant, 2022, Imagination Lab)

“It is a beautiful process to awaken, to bring people into this expansiveness and understanding. And I was thinking 'this is really interesting—I'm in a group that is now dancing.' I'm coming with this broad complexity mindset and we were able to find the nodes and the threads within that—and could still connect—coming from these two places dancing together.” (Participant, 2022, Imagination Lab)

The initial discomfort of sitting with questions rather than jumping to solutions gave way to a greater appreciation that participants can generate their own radical and powerful questions. And to realise that a process of co-inquiry is an equally (or more so) valid prototype than simply generating a product or an action plan.

In reflecting on the impact of both the 2020 Design Lab and the 2022 Summit, perhaps the biggest impact we heard from participants was the 'calling in' of different possibilities. The resulting focus—on the importance of ceremony, symbolism, healing and metaphor in the economy—was uniquely enabled through the *container* that had been created.

In some ways, we could summarise as work as 'creating hope for the systems aware.' However, on reflection, we realise that what we are really seeking to do is to create escape artists; to liberate ourselves and others from the world-views

that tie (and retie) us to the current system. And so our biggest hope is that we have unleashed a new cohort of self-empowered ‘escapees.’

Lessons Learnt and Lingerin Questions

If we had to summarise, then three key learnings for the building of liberating structures for our ‘escape artists’ were:

1. The importance of taking the time to “see the system,” underpinned by generative dialogue processes. While systems mapping is helpful, it needs to call to a diversity of imaginations and may include embodiment, art, and poetry.
2. Participants need ongoing support in “navigating complexity” as they move through co-sensing and world building. It can be confronting and disempowering to see the threads in the system but not to know how to have influence. The effort that goes into shared sensemaking should be matched by the time and support for invoking agency and the identification of systemic leverage points and interventions from the place where participants stand in the system.
3. It is important to encourage participants from often more comfortable spaces of co-inquiry into the uncomfortable uncertainty of ‘feedback loops’ and testing of assumptions, rapid prototyping, and the generation of new questions.

Through unpacking our work with the David Suzuki Foundation, we have offered six elements above as critical to the building of ‘escape artists.’ On reflection, we would like to add one more to this list: *Holding the Space for Transition* . This is an ongoing area of innovation in praxis for us. If transition is an emergent property of the system, then our role is to create the conditions and space for this to emerge. We cannot dictate this through a focus on outputs as impact, nor can we control the outcomes of the processes we create. Rather we see the beauty of “letting go to let come” (Scharmer, 2007), and have seen this play out in many diverse contexts. Our focus must be on participants experiencing ‘escape’ for themselves in a way that releases them from limited world views and opens up new futures and possibilities that may have felt impossible before. We have found that, for a range of reasons, many of us have been deeply conditioned to not challenge world views or paradigms. We are so caught in what already exists and have lost faith in ourselves as organic and dynamic entities for which the rules of emergence also hold true. Faced with rigorous questioning of future pathways, fear and anxiety can quickly turn to resistance and hostility. It is in moments of transition, with all the ambiguity and messiness, that it is hardest to hold a sense of the whole. This becomes our work of holding participants in that space between falling and landing where

nothing is yet certain. We don't have all the answers and are still very much grappling with questions of how we hold this transition space including:

- How do we move into sustained transition and rounds of collective co-inquiry and action once we leave 'the container' and encounter resistance from the wider system?
- How do we not get immediately recaptured by the dominant world view?
- How do we stay playing at the edges, dancing with difference, whilst also substantially intervening in the current context?

Key areas of our ongoing work include:

- Creating more robust and participatory frameworks and processes for 'leverage point' assessment and intervention;
- Building authorising environments and practices to extend co-creation beyond the initial container, in a way that doesn't pull us back into old patterns and holds us in transition.

In conclusion, we would argue that grappling with different realities, building new worlds, and delving into the metaphysical is not a trivial exercise. To some degree, it appears Western culture has destroyed the fabric for the collective development of new narratives and lost the art and respect for world-making outside the realm of fiction. If we go back to the 'red threads' in our lives, we have constantly been seeking to escape traditional constructs and our bounded rationality by bringing together bodies of knowing and knowledge. The injustice of exclusion and of othering or ignoring tacit knowledge and other ways of knowing is paired with an urgency to build new possibilities for a world in crisis. Helping people to not just see the current system but to enliven new possibilities for a different future and then hold the space for transition is critical, and where we see our ongoing role in forging meaningful transformation.

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In Dialogue

Transgressive Knowing:

Lying Down with the Trouble¹

Oliver Koenig, Megan Seneque, Bayo Akomolafe, Ioan Fazey, Dylan McGarry,
Injairu Kulundu-Bolus, Fiona McKenzie, Michelle Proyer

Context

Over the years since JASC's inception, the Editorial Team has had many conversations around the topic of research and what we mean by it. In particular, as we read, review, and dialogue about a wide range of submissions that come our way, we are continually called to reflect on and clarify what we mean by *transformative research*. The journal itself arises from recognition of the need for a new *research paradigm* to respond to the intersecting crises that we experience and a desire to provide a platform to support its emergence. Many of the contributions to the first six issues of the journal reflect this commitment to giving life to research approaches that are more inclusive, just, and equitable, and to giving expression to the pluriverse and world-making (de la Cadena & Blaser, 2018; Kotharti et al., 2019; Rose, 2011). Our understanding of transformative research, and its properties and boundaries, has deepened through our ongoing dialogue with the articles submitted to JASC, and with each other. We felt the time was right to broaden and expand this conversation, so

¹ With apologies to Donna Haraway (see Haraway, 2016).

JASC editor-in-chief, Oliver Koenig, and Associate Editor, Megan Seneque, invited into dialogue a small group of individuals deeply immersed in exploring research and praxis paradigms that respond ethically, critically, and creatively to the intersecting crises of our time. Together, the group set out to explore the integrity of *research* and *practice*, their critical entanglement and co-dependence, and the nature of practices that enable worlds to be created in certain ways. The intention was for the contours of transformative research paradigms (ontological, political, epistemological, social, ethical) to emerge from co-inquiry. Thus, the dialogue itself was a lived experience of the kind of world-making practice(s) that are characteristic of transformative research.

World-making and the Pluriverse

World-making (or worlding) is an active ontological process. The notion of world-making reminds us that we are in a constant state of becoming as we bring forth worlds of action and meaning. We are, all of us living beings, engaged in world making (or unmaking).

In the practice of ‘worlding’, changing course will involve “...a practice of a world in many worlds, or what we call a pluriverse. Heterogenous worlds coming together as a political ecology of practices, negotiating their difficult being together in heterogeneity” (de la Cadena & Blaser 2018, p.4). This idea of the pluriverse challenges the dominant, modern worldview that promotes a singular, homogeneous reality. Instead, the pluriverse emphasizes a multitude of diverse, interrelated realities shaped by different social, cultural, and ecological practices. It represents a shift from a focus on uniform global development to recognizing and valuing diverse local and Indigenous perspectives, advocating for a world where many worlds fit, each with its unique way of being and interacting. It is a practice of world-making - of becoming - of creating right now the foundations of the worlds we want to see come to fruition in the future (Kotharti et al., 2019, p. xxxiii).

Participating in the Dialogue

Bayo Akomolafe

Philosopher, writer, activist, professor of psychology, and Executive Director of the Emergence Network.

Iaon Fazey

Professor of Social Dimensions of Environment and Change, Department of Environment and Geography, York University.

Injairu Kulundu-Bolus

Senior Practitioner interested in fugitive ways of regenerating a lived practice of

decolonial love and a paradigm of peace with the Environmental Learning Research Centre, Rhodes University, Makhanda, South Africa, and beyond.

Dylan McGarry

Senior Researcher at the Environmental Learning Research Centre (ELRC), Rhodes University, Makhanda, South Africa; Senior Research Fellow for the T-learning Research School and Founder of the Institute of Uncanny Justness.

Fiona McKenzie

Director of Orange Compass and known for her systems thinking expertise and facilitation of systems transformation initiatives in diverse contexts globally.

Michelle Proyer

Professor of Inclusive Education, currently transitioning from University of Vienna to University of Luxembourg. Affiliation, role etc

Dialogue Facilitators

Oliver Koenig

Professor for Inclusive Education and Inclusion Management at the Bertha von Suttner University in St. Pölten.

Megan Seneque

Associate with the Presencing Institute and Research Associate with the Susanna Wesley Foundation at Roehampton University, London.

Landing in Relationship

Megan: It is so good to have everyone here. Oliver and I are also conscious of the fact that some of you have not met one another. So it would be really good if you could briefly say who you are, the country where you find yourself, the context that is shaping you and that you're shaping, so that we can land ourselves in relationship with one another. And then maybe what sparked in you from the invitation when we first offered it?

You all know that I'm Megan, that I'm a South African living in Australia. I said to Dylan that I still pine when I see photographs of northern Zululand. So I know that my country is actually still South Africa, and I feel utterly at ease and at home in Australia and elsewhere in the world, I suppose. Delighted to be here and to be exploring these lines of inquiry with you.

Dylan: I'm Dylan McGarry. I prefer to be called Dyl, and I come from KwaZulu-Natal, where I was born. However, I've lived for quite some time in Makhanda, formerly known as Grahamstown. I'm currently at the Environmental Learning Research Centre at the University, which is presently known as Rhodes.

What really excited me about this was the idea of playing with words and how they help us carve new pathways. I'm fascinated by the concept of how words are like spelling, and casting spells, considering they share etymological roots. It's intriguing to think about the magic, power, and responsibility inherent in our

practice of creating words. This, along with the extraordinary panel, sparked my excitement.

Admittedly, I had feelings of imposter syndrome before coming, wondering, “Oh, no, do they really need me?” So, I'm very honored and grateful to be here, and I want to express my thanks for this opportunity.

Injairu: My name is Injairu, and it's very, very nice to meet you all. I am originally from Kenya. I am also based in the Eastern Cape, in Makhanda, a place from which many of my biggest learnings about the continent have come. It feels like a rich and potent space to think and breathe into the questions we're asking.

About the invitation, I must say, for me, it's a bit challenging. When we center words *research* and *transformative research*, I find it suddenly difficult to articulate what I feel. These words that are so laden with meaning that pre-empt my arrival. There's something about the messiness of that and trying to navigate my way into the conversation that is tricky and interesting.

Fiona: So, hello, my name is Fiona McKenzie. I grew up on a farm in rural outback Australia and still pine for that place. My academic background is in human geography, but I see myself more as a practitioner. Like you, when I encounter the term *research*, I question if it truly encapsulates what I want to express. And Dylan, your mention of imposter syndrome resonates with me too.

Perhaps none of us would have turned up if we'd let our imposter syndrome take over. What really excited me about this was the focus on sharing lived experiences. That's an area I feel confident speaking about, even if there are other topics I might not be as well-versed in. So, I'm really looking forward to hearing and learning from others as well.

Ioan: I can come in. It's nice to meet you all, and it's especially good to see some old friends I haven't seen in a long time. So, my name is Ioan. I currently reside in York and work at the University of York in the UK. Like others have already mentioned, the term *transformative research* always intrigues me for various reasons. I'm really looking forward to delving into that topic. What particularly excited me was the offer, or the invitation, to share experiences rather than just cognitive personas or similar concepts. So, it's great to be here, and I'm grateful for the invitation.

Bayo: So, my name is Bayo Akomolafe, and I'm currently in Chennai, India. It's great to meet you all. I've seen some familiar faces here. Dylan, what you mentioned about spelling is really intriguing; that concept will stay with me for a while. Thank you for sharing that piece of magic.

Regarding my interactions with the term *transformative research*, I find there's an itchiness to it, a kind of restlessness. It's as if research alone isn't sufficient and now needs to be qualified as transformative. In film theory, there's a concept called the establishing shot, where a director pans across a landscape at the beginning of a movie. This technique is used to build the plot and establish

location and character. There's a sense in modernity that assumes all the information we need about the world is captured in this establishing shot, as if a first glance is enough to dissect the world. This presupposes that we can stand apart and remain sterile, outside of the world's influence.

I think now the world is demanding something different from us. It's asking us to move, to travel, to lose our stability. In the invitation to not just transform research but to transform the researcher, I hear a call to action. That's what resonates with me. Thank you.

Michelle: If it's okay, I'll follow up. My name is Michelle. I'm really happy to be here. It was Oliver who invited me, and he taught me a lot about some of you and your collaborations so far. After listening to all of you, I've become quite excited. Like many others, I find myself questioning whether I'm the right person to be here. Initially, I had a few things I wanted to say, but now, after hearing your contributions, I've circled back to one particular question.

Currently, I'm based at the University of Vienna. I've had the great pleasure of working extensively with Oliver, sharing parts of our educational journey and now our academic careers. What resonated with me just now is a question that has been troubling me: the language we use to describe sustainability, which is a topic I'm presently engaged with. The idea that everyone needs to be involved in sustainability actually makes me quite unhappy. We have a lot of interesting regulations and papers related to this, but it seems like no one really understands what it means to have everyone involved. This issue probably represents many of the other challenges I'm facing in my work, particularly in making sense of meanings across different languages. I work closely with colleagues from Thailand, and we use a method to create meaning in a translingual way, which is really exciting. It also aids in understanding and addressing some elements I feel are missing in research, like detailed accounts, which I might talk more about later if it's of interest. But when we discuss these broad terms and who should be involved, sometimes I feel like they only make sense to a few people. Perhaps no one truly knows what they mean. This is something I wanted to bring to the table as a starting point. Thank you so much.

Co-inhabiting the Borderlands of Theory and Praxis

Oliver: Thank you all, and thank you, Megan, for kicking us off. It's a pleasure and honor to be with you all. So, I'm Oliver. I have the privilege of serving in the Editorial Team of the *Journal of Awareness-Based Systems Change*, and for its inception period, I have been serving as its editor-in-chief. This title has never really sat right with me as it has been, and I guess will continue to be, a truly collective endeavor.

Many of the things we prepared and hoped the invitation would spark and ignite have already been present in this first round of introductions. Yet, when it comes to providing the frame for our time together, I would like to spend three to four minutes to reiterate a little bit about the intentionality behind us coming

together in this way. Since I'm a bit nervous as well I'll stick to what I've prepared and written out.

I am deeply delighted and humbled to, together with Megan, have been able to invite and now host this dialogue session. Ever since we have co-initiated the journal, the sense that there are different threads, inter- and intra-secting globally, of a larger whole that is co-attempting to stretch the (largely) man-made boundaries of what is constituted as valid and helpful, has only become clearer. As with other emergent discourses and practices, definitions of transformative research are currently abundant and can be found across fields such as social sciences, the humanities, technology, engineering, and many more. Common to these definitions is an intent to depart from or transgress established forms of knowledge generation, reaching new understandings of the nature and ways of dealing with and in the intersecting crises and ruptures of our time. This includes moving away from the long-esteemed neutrality of researchers and the knowledge produced, embracing ethico-onto-epistemological forms of responsibility as coined by new materialist scholars like Donna Haraway and Karen Barad. Today, we do not intend to level this plurality of approaches. Rather, we embrace the notion of the pluriverse, a world of many worlds, and seek to dive into the becoming of these emergent fields and our becoming with them by sharing examples and experiences of our transformative and transgressive research practices. In doing so, we hope the contours—ontological, political, social, et cetera, of transformative research paradigms will emerge from our co-inquiry. Our dialogue aims to be a lived experience of the world-making practices characteristic of transformative research.

New Materialism

New materialism is a modern approach that emerged around the year 2000, emphasizing the significant role of physical matter in fields such as philosophy and feminism. It challenges the traditional focus on language and culture's influence over reality. According to this theory, matter itself—ranging from human bodies to technology—actively shapes and interacts with our world. Thinkers like Barad (2007) and Braidotti (2023) argue that matter is not a passive backdrop for human activities but an active force that both influences and is influenced by social and cultural dynamics. New materialism encourages a deeper exploration of how matter as an active force can help us understand power relations and social structures, moving beyond views that prioritize human perspectives and cultural constructs.

Each of us co-inhabits a variety of spaces in the borderlands of theory and praxis. Megan and I have held dialogues about our experiences of co-inhabiting such spaces, which, especially when difference is present and openly invited, we often feel to be an inhibiting space filled with what appears as conflicting demands and

positionalities. We have come to see these spaces as mirrors of deeper structural issues and regimes of violence. We discussed ways to lean into that space, feeling the schism, the pulls and pushes within us, and how important and liberating it is when something is able to crack-open and groups can arrive at a common understanding that honors the critical inter- and intra-dependence and mutual, inseparable entanglement of these aspects. We talked about how these same dynamics have, and are still, playing out within ourselves. We talked about the hegemonic power of performativity, of performance anxiety, and the obviously endemic feeling of imposterism—the ultimate disempowerment being the internalization of these expectations, even when unclear. We explored liberating pathways, relations, and spaces/sanctuaries that enable us to give ourselves permission to value and attend to other ways of being/doing/knowing which, in turn, significantly impact our world-making abilities, our abilities to be in and make sense of the world and our role/s in it. These are the issues we would like to dive in with you together.

I'll stick to that here and would really enjoy us kicking off with anything that has been sparked. We will try to see how this shared space evolves together with us.

Bayo: Good introduction, brother.

Sandpits and Paint Pots: Making Knowledges Together

Fiona: I'm jumping into the breach. Maybe this will be my only bit of wisdom to offer in the whole conversation and I'm giving away all my good stuff straight away. I was struck by the idea of the lived experience and what transformative research really means. In preparing for today, I reflected on when I felt it was most transformative, and I thought maybe I'd just share a story, if that's a useful starting point. The story I have is about a day. Well, it was part of a whole process, but a particular day, where, as part of a research project, we did 'futuring with four-year-olds.' The team went all around Australia. We went to early learning centers and we ran futuring processes and we spent a whole lot of time trying to construct these processes, building on everything we'd learnt to date about early childhood and reflexive futuring. Earlier, we'd spoken to foresight specialists, asking, "Have you ever done this with four-year-olds?" and everyone said, "No, twelve is the youngest," etc. So we were in uncharted territory. Turning up to this early childhood center, the children were—it was highly unstructured. They were just beautifully free, running around doing whatever they wanted, curiosity-driven.

I thought, "Okay, I just have to be with that." And it forced me in so many ways to let go of all the constraints I had. In the end, I went and sat in the sandpit and set up some mud pits and this sort of thing. Then I set up a paint station. I just started painting. One by one, all the children started coming over, and I just asked questions. Some of the questions we had were around, "Do you want to draw a picture of your most special places or special people?" or "What would be your best day ever?" and this sort of thing. What was really amazing was how

substantive the content they created was. They created drawings of families and nature,—they drew elaborate maps to Cookie Monster's Cave, for example, or one child who felt they didn't have much family instead drew what they called 'a road to somewhere.' All these different things came out and led to amazing insights around what they were valuing around care and connection and just this yearning to be free of this yard that they were in. This work was being fed into other processes, including into policy work by the federal government. And it really highlighted how, essentially, the policy direction that early childhood has been taking in Australia is going in almost exactly the opposite direction to everything that was yearned for in these paintings, drawings, and conversations. When I got home at the end of the day, my partner said, "Do you realize you've got paint handprints on your back?" I was surprised; I hadn't realized it. All of that made me think about what I wish transformative research was—the becoming.

I think it's where the researched becomes the researcher, and they are the contributor. In all the projects we do, it's very much about taking on the role where the participant is the researcher. Where research escapes its confines. Just like those paintings, it's almost like changing the frame or redefining the problem space. Maybe this project or others might have been centered on education, but it went into a whole piece around the built environment, nature, and space. It escapes those initial confines; we don't restrict it to a problem space just because that's a discipline or a field. It grows wings.

This is part of a broader approach we take, which is that evidence must be convergent. We don't wait for formal academic evidence only. We weigh equally evidence from the field, from families, and First Nations perspectives.² We try to converge all those together. We aim to honour that knowledge is generated through many different systems and at many different scales. That is another piece.

Finally, I think the word research is being liberated, so it's not owned just by researchers, academia, or others. When I was thinking about where I felt I've had to step most outside of or do research in a different way and have been most beautifully surprised by it, I think of that day. It was quite profound in everything that day represented, from sitting there with the paint pots in a sandpit and trying to deconstruct, but also just the open-mindedness and everything that was there with those young people, to the handprints on my back. That's what I would like to see as becoming, Oliver.

Dylan: That's so beautiful, Fiona. Thank you. There's so much in that and it's sparkling and bubbling up for me. When Bayo was talking about how research needs to be transformed, it made me think of how research is just storytelling

² See McKenzie & Millar (2022); McKenzie et al. (2023).

and sophisticated and rigorous “story listening,” weighted more on the listening than on carefully thinking about the storytelling. Your story also shows this kind of intimacy and tactile-ness of making knowledge together. I’ve written elsewhere, about this longing for “tactile-theories.”³

Injairu and I have been exploring how to democratize research through a “call and response” process. It's about calling and responding in the same way that the traditions of singing in South Africa and Southern Africa are through call and response singing. We've written a paper around that on living, learning, and leading into transgressive research,⁴ and we open that with the idea of this practice of singing, and calling and responding, which opens up a kind of ‘collaborative-becoming’ practice. It's ongoing, it's iterative, but at the same time, we're transformed in it. The music plays in us and shapes us. Our shared mentor Prof Heila Lotz-Sisitka, often shares the story that *Ben Okri* talks about the double-sided axe; that which you cut with also cuts you, and in the research, or the call and response, or the call and response, one can't help but be transformed by it, and changed in it. If one is not available for that change, then what kind of knowledge are we making and what kind of atrophies are we just setting in place?

The final thing that really jumped out for me is our work on the Tarot of Transgressive Research.⁵ We've been involved in the Transgressive Learning⁶ research network, trying to think about the needs for boundary crossing and how part of that call and response allows you to jump over things and across things and find entrances and exits between knowledges. In the tarot project, we looked at how researchers are having to rename themselves (co-conspirers, Indigenous allies, responsible participants, etc.). We're practitioners, we're more pracademics than anything. We've been mapping those ways in which researchers are changing their names and querying what the role of a researcher is, which I find really exciting.

Anthro-Milling and the Death Cycle: Lying Down with the Trouble

Bayo: I'd also like to add my coin in this. Well, I've screwed up my metaphors now! I'm not sure if I shared this with Megan the last time we spoke, but I'm very intrigued with an entomological phenomenon involving ants in a spiral. I

³ See McGarry (2022).

⁴ See Kulundu et al. (2020).

⁵ See Temper et al. (2019).

⁶ See <https://transgressivelearning.org/>

don't know if anyone has heard about this, ants going around in a circle. It's called a death spiral. Ants secrete pheromones and their pheromone trails. Sometimes, at least from our anthropological perspectives, an accident occurs. The pheromones loop on themselves and they go around in a circle. These circles have been observed to be as big as a stadium. Just ants marching in a circle for days in rain, sunshine, snow, whatever. They just keep going around for days. Another name for it is ant milling. Ant milling. And I often joke that they have motivational speakers urging them to keep on going, that they can make it, you can do it if you try or persist or something. They keep going round, hoping to arrive home, but they keep going round and they die in a circle. That's why it's called a death spiral. All of them infected by this trance just die. Does that remind you of something else? I'm sure it does. Us anthro-milling is what I call it. It's like there is a sense in which we keep going round and round, and something about this speaks to some of the habituated forms of knowledge-making and co-sensing that have innovated modern civilization, deeply.

I will use a phrase of a brutal humanism, the sense that we can stay still and just photographically capture the world around us. Right. This is the space where there is a lot of upheaval of sorts, inviting us to notice that knowledge is not capture. There is something deeply colonial and troubling about the idea of knowledge as capture—cognitive capture, even. *Knowledge is proprioceptive*. We have to move in order for the world to move alongside. There's no capture here. There's no stable image. Right? We move along with the world, right. And, in the words of Chinua Achebe,⁷ Nigerian novelist, there is no moving the world. We have to move with the world at its own pace. So I guess what I'm trying to invite here, offer here, is this idea of knowledge as proprioceptive and leaning into what my brother Dylan just shared a while ago about the transgressions and transgressive knowledge. Black studies have, for a long time, situated knowing and knowledge in tandem with post-humanist, material, eco-critical, and feminist ideations of knowledge as fugitive. Alex Moulton⁸ would speak about fugitive study, right? That is, outside of the circles of convergence that the university uses as its surplus value, offering credits in order to situate knowledge in that way. Outside of that seems to be the transgression.

The idea that knowledge cannot be centrally humanist. It may not even be tied so intricately with awareness. Maybe there is a sense in which not knowing is part of, at some molecular level, what knowing involves, or what research involves. The handprint on the back, Fiona, feels quite right. Like there's no way to articulate, or codify, or archive that, right? So what escapes the archive? What

⁷ See Achebe (2002) <https://artafricamagazine.org/a-luta-continua-the-world-is-dancing-a-masquerade-chinua-achebe-interviewed-by-ulli-beier/>

⁸ See Gross-Wyrtzen & Moulton (2023).

escapes the system? What spills away from the choreography of higher education feels to me like the call to transform research, to tether our understandings of the world in assemblages and firmaments that are beyond the human. Maybe the last thing I'll share, in keeping with Fiona's beautiful beginning, is this short story about what I think about as transformative research. I have an autistic son, and when he was three or four years old, he had a moment. We don't call it a meltdown. I'm a trained psychologist, but my wife has forbidden the use of terminologies like meltdown. We call it something like "the passing of a wild god." It's cumbersome, but it's quite appropriate to our situation here. So my son experienced that in a shopping mall in huge Chennai and I'm quite easily embarrassed in public, especially in India. There are racial dimensions to it as well. But I didn't want to be the Black guy who was having a screaming child next to him.

I tried my very best to cool him down, which was a horrible idea. I tried to persuade him to get to somewhere safe so I could address this, and it wasn't working. I was failing miserably. My wife, who is 10,000 times more intelligent and grounded than I'll ever be, saw what was happening. She made a beeline to me and said, "You know what? I think you should step away from this, and I'll handle this." So I walked away with my tail between my legs. She said nothing to my son, absolutely nothing. She did not try to persuade him or offer him hope. She just stayed next to him on the floor, lying down next to him on the floor, just a spectacular and scandalous disappointment to consumer politics right there in the middle of a shopping mall with a billion people looking. She just stayed right there, and people were walking around, wondering what was happening. My son was screaming, and she just stayed quiet. I looked from a few feet away and reminded myself that this is the politics I'm looking for. It has to be an autistic politics. It has to meander away, losing one's way in order to build new solidarities and strange new alliances with the more-than-human world, because we're stuck in that anthro-milling circle. Just wanted to add that.

Rupture, Witnessing and Coming to Our Senses

Injairu: I'm feeling myself reverberate from all of what's being offered here. This idea of stepping away from. I'm going to try and get to the heart of something that I've been sitting with ever since this invitation came, which feels like part of the story that came for me when you asked about ritual and world building. I kept thinking, what comes to mind? For me, around things that break the choreography and open up a different kind of politics, what came to mind is a wedding that I went to in Kenya. Weddings, of course, are rituals we are very familiar with. This was an invitation we got from our neighbor. She said they're inviting a bride into their home, and they would love for everybody in the community to come, to stand as the family of the groom, while welcoming the bride. We all know how to play this role. Everybody went to their stations and looked for beautiful big outfits. There's also a particular kind of pride that comes with being the family of the groom. If marriage could be construed as a zero-sum

game—in a patriarchal society—it's mostly the family of the groom who feel like they are winning. It's a funny thing because even the musician at the wedding was composing music, trying to tease the bride, saying, "Take your time, my dear. Take your time, my dear. We are the winners. Welcome home."

But this was a very interesting moment because we all knew the choreography of a wedding invitation, but what ensued was something really spectacular and different. As soon as we got into the space, to cut a long story short, the father of the groom stepped forward in front of his son and asked him for forgiveness. He said, "Please forgive me for anything that I ever said or anything I've ever done to you that has had an impact on you, consciously or subconsciously. Any words that have landed, any time that I hit you, any resentment, any pain I unintentionally caused you, please, please forgive me." The father, this huge stature of a man, fell to his knees and cried at his son's feet to ask for forgiveness. Then the mother came and said, "My son, please forgive us for anything we ever did that has not sat well with you, any hidden resentments, anything you thought we needed you to be. Please, please forgive us." We were all sitting there in a circle. It was a very interesting space because we all came for this wedding, thinking we knew what our role was going to be. And then we had this completely deconstructed moment where a sense of intergenerational transmissions, the parents humbly came to a space of thinking, "Okay, our role as parents, we've had difficult moments. And we want to ask for the space for that to be cleansed and cleared for you. So that when you step into this space with your bride, with your hopes, that you're cleared of all of that."

It was such an emotional crack, an emotional crack in all the status and stuff that we do and all the choreography that we know. It completely changed who we were in that moment and what we were witnessing. We were all there to open up a new trajectory for this young couple, and her family was there too. All the protocols and everything just got completely smashed in that moment. I felt like there was something so powerfully transgressive about that moment. I feel like when we talk about transgressive research, transformative research, I long for the moments where things really flip the script in that way. Just happen in a way that it changes what we think we're doing. I think, for me, this links with these wonderful moments that you're speaking about, Fiona, and even the incidents that you're speaking about in the mall, Bayo—that it holds something of this kind of rupture.

Ioan: Maybe I could come in at this point. It's been great to hear all of your experiences and your thoughts. There's so much complementarity in that as well. What I'm loving is the different words we're using from the different contexts we've got, but also the complementarity in all of that. I had the privilege of listening first, so I'm going to try and summarize where I think I've got to in this conversation and listening to you all. The first is to take us back to why we are having this conversation. I think we're having this conversation because we're frustrated with the conventional modes of what we might call research. I'm not even sure I like the word research at all anymore. In a sense, then, we could

think about operating research in a world of transformation. The world is transforming. The old patterns are no longer suitable for what is happening around us. In that world, we can think of research in broadly three terms. We could be doing research on transformation, research for transformation, or we could be doing transformative research.

Research on transformation brings in the conceptual foundations that underpin most of traditional science, social science, and so on, which is that we stand from the outside looking in. So that's observing the transformation and trying to infer something from that. The second, research for transformation, might be where I see a lot of transdisciplinary researchers. They try to support action in some form by changing what their role is as a researcher, becoming a facilitator. I do quite a lot of that work as well. It can be very helpful. But what I'm hearing is that we're talking about something quite different, which is this real sense of where the researcher is what is transformed, that then allows something else to then happen and take shape around it.

Let's put that into context then. If we think about our dominant modes, let's call them formal knowledge institutions—universities, research institutes, that sort of thing—they're part of the world around us, part of the old pattern problem. That's been mentioned in terms of talking about certain forms of education that might bring. As researchers, we operate in ways that mean we are usually just re-producing these kinds of institutions and how they function, leading to the same kinds of more traditional modes of research. It goes back to the milling of the ants idea expressed earlier. So somehow, we have to step out of it. What I find in universities is that we are tied into it, and it's very hard to disentangle from it. It's almost impossible, I think. Given that Universities represent a particular mode of understanding about what constitutes knowledge and how we know, then I don't think these formal institutions—like universities—will survive in their current form. That is, because they represent an old pattern that is increasingly less fit for our fast changing world.

So what then—for me—is really key is that our universities don't capture the wider realities and ways people relate to and experience the world. You can make of that of what you like, but there might be multiple realities from different cultures and different experiences and very different ways one might experience the world, such as the experience of time or change. For example, some might understand that there can be *futures* in our present or multiple quantum dimensions. This completely changes how one walks in, or navigates, the world around them. What are the realities for the ants—mentioned earlier—for example. What are the realities of non-humans as well as humans? Universities don't seem to be able to capture the essence of those wider realities and the opportunities they bring for supporting transformational changes for individuals and society.

If I summarize what I'm then hearing from others, the transformative research is then a process of enabling a researcher—and again, I don't like the word

researcher in that, but I don't have a better word at the moment—to transform, to be transformed themselves. To me this includes building opportunities to experience these multiple realities and radically shift one's experience of how you can *be* in the world.

We heard that in Fiona's explanation of her experience, the child when they're unleashed, when they're just being children, for example, and some of the other experiences you all talked about. So, something about this way of being and this experiencing of these multiple realities. What I'm hearing from that, as well, is that it has a deep *experiential* component. It's not a cognitive process in the normal academic sense that we have in universities. For me, learning to be differently in the world through experiencing different realities is a felt process.

This is what I call “coming back to our senses.” As you develop capacity to explore further different realities, then you also learn to come to that as a whole synaesthetic feeling—a multi-sensorial experience—within a wider set of connections that are around us. It's beyond being cognitive. If we're just relying on the cognitive, we're not going to think our way out of the challenges we now face in the world. We have to come back to our senses and be much more than just a cognitive being.

For me, also, what I'm hearing and picking up is this notion that it a personal transformation then is ultimately an identity shift, an existential shift. In a world undergoing transformation, questions arise such as “Who am I at the end of the world as we know it?” or “How can I experience a different set of realities that continue to dramatically reshape how I operate and be in the world?” There's an element of going beyond cognitive, a felt sense, being able to experience the multiple realities beyond our confines of what we are and who we think we are.

What does this then mean for universities? The notion of the transformation for a researcher—a shift stimulated by powerful transformational experiences that lead to changes in sense of identity and purpose—then have to permeate, somehow, into our formal systems and structures of which we're a part. There are no easy answers here, except to recognize that we all have a role to play in this.

I feel I've been fortunate to fall into and actively explore these different multiple realities. I've been engaging with shamanic practice for over 20 years and have been fortunate to work within many different cultures over this time, including in Australia—as I look in this conversation to our Australian colleagues—my practice has helped me engage in the experience of multiple realities out there. As an example, shamanic practice has two fundamental principles. The first is that everything has consciousness, whether it be a stone, the sky, the wind, an animal, whatever, it all has consciousness. In simple terms, that just means that everything is made of energy. We are not separate from that. We are part of it. The practice is then about honoring that consciousness and learning to engage with it, beyond a sense of self, beyond one's own reality that one creates. This

opens up—in a multi-sensorial way—our ability to let go of a sense of self and experience how we are within a wider *whole*. The second underlying principle is that there are multiple realities out there that you can open up to and engage, and start to sense things in very different ways, including the other beings and consciousness that we may or may not be normally aware of. This is a process of opening one's sense of these other ways of understanding and being. For me it helps because I don't have to use my cognitive thinking and it gets me into feeling and sensing in a completely different way. That is liberating, and helps shape and reshape one's sense of identity or purpose in the world.

Deconstructing Certainties: Words and World-Making

Megan: There's something profound about not knowing for me. My early academic career was as an applied linguist, and that's when I learned how words are world-making and playing with language. We think we have such certainty with words and language, but we often don't know what we're talking about. I'm happy to improvise, even with the imposter syndrome, because when we create with language and understand how we look for certainty in language, we need to actually deconstruct our notions of certainty. This includes, as you were saying, the acknowledgment of multiple realities. We don't want to acknowledge multiple realities; we love our certainties, which we often construct through language. For me, being in South Africa, being exposed to multiple languages, living in France for nine years, and sometimes not knowing what on earth people were talking about, I felt quite happy with that because we often don't know what we're talking about. And it's just as well. The exploratory nature of this conversation is precisely what Oliver and I were trying to create.

My baptism of fire as an applied linguist was being shoved into a medical faculty and told to sort out (second language) students' language problems. To teach students academic literacy so they could fit in at the Nelson Mandela School of Medicine (where Steve Biko studied): an all-Black faculty in an all-white university. That's when I learned to fiddle with everything. The moment I shifted from “solving the problem of under-prepared/disadvantaged students” and engaged with staff in curriculum transformation, and deconstructed curriculum knowledge in a problem-based program (where people were not able to teach their discipline-based knowledge), we created a learning environment. Staff had to understand that most of the students had consulted traditional healers, *Sangomas*, shaping their worldview. Yes, they were going to become doctors. Why did they then have to dismiss lived experience? That just opened my eyes, and the 15 specialists I was working with went on a journey where they said, “My God, I thought I knew how to teach. I realized I've had absolutely no idea what it means to enable people to learn.” It wasn't a relativist understanding of knowledge. It was understanding how you come to know and engage with the knowledge-making process, the meaning-making, sense-making process that is transformative. Everyone was transformed. In the early '90s, that was my experience. You can dismantle, deconstruct things that appear to be deeply

certain. A lot of it is fiddling with language, being very intentional and playful at the same time with language. Words are world-making.

Sangomas

Sangomas are highly respected traditional healers and practitioners of traditional African medicine in Southern Africa. They fulfill different social and political roles in the community like divination, healing physical, emotional, and spiritual illnesses, directing birth or death rituals, finding lost cattle, protecting warriors, counteracting witchcraft and narrating the history, cosmology, and concepts of their tradition.

Fugitivity

Bayo: Can I piggy back here Megan? My point here is about something you said about the shamans, Megan, with the people that you worked with. The Yoruba healers and priests would say that knowledge isn't just something neat, it's to be met by the world in return. If there is a sense of mutuality here, it's to meet, but it's also to be met. It's to encounter and be encountered. Or as Barad would put it, it's how bodies introduce themselves to each other, right? How the mouth introduces itself to food. It doesn't even require consciousness for knowledge to be a thing.

Maybe I'll just tag a few points along to this consideration, that qualitative research has actually done some good work in situating the researcher as part of the research. So that doesn't feel new to explore. Qualitative research, of course, is deeply suspicious of every objective account of reality, as if it were outside of our formulations and constructions, to some extent, and I think it constructs this as critical reflexivity, bringing the researcher into the research process.

But to some extent, that doesn't also feel enough for the moment we're in—my brother was talking about, the end of the world as we know it. That doesn't feel adequate to the world, because critical reflexivity can still leave us navel-gazing, still stuck on ourselves and our processes. There's something that feels deeply shamanic, that bursts you out of the vortices of the self, of dissociation, that seems implied in what we mean by transgressive. And I just love the terms transgressive, even to transformational, because transformation has been used ad nauseum. So critical reflexivity feels like a way to go, but it doesn't also feel enough. I think this is why Elizabeth St. Pierre⁹ has been articulating post-

⁹ See St. Pierre (2021).

qualitative research. That's another thing to consider alongside what we're talking about.

But the other part is inclusivity—it is also to be bracketed right there. There is a lot of work around including and inclusion. I know my siblings here have spoken about sustainability and inclusion, but across the Global South specifically, I think there is a sense in which we think about inclusion as populating already extant fields of reality. We're populating already baseline realities, dragging people into a gentrified, gilded space where the only politics is one of access. So we can only bring you in. There's nothing else to be done outside of this circle. There is a sense of just giving you a seat at the table. This is where power is situated. As much as we need representation and diversity, even though the idea of diversity and equity and inclusion has been hijacked by Google and giant corporations, and they have departments for that, as much as we need that, there's a sense that we need to explore, we need to roam away from that convergence to which the shibboleth is inclusion.

Maybe the last point I'll make is I'm very privileged to be part of unlearning communities around the world and consider myself a public intellectual in this, where I'm testing, along with others, this idea of the transgressive or what I call post-activism or ontological fugitivity or sensorial mutiny. The aesthetics of the words is around breaking away from the plantation of knowing that has been endemic to the human or the anthropos. We have this course called *We Will Dance With Mountains*.¹⁰ Part of the course has been this hybridized approach, a very thorough line of pedagogy, running through it for three months, a thousand to two thousand people, and online.

For six years we've been doing this. Recently we started to feel that the conference format is dying, and I'm not sure if everyone else is feeling that. But there are even some papers exploring how Zoom is becoming really exhausting. There's this frontal assault that is debilitating, and people are no longer able to learn. It seems this way. So I started to explore the idea of the carnivalesque. There's a lot of Caribbean writing and literature around para-pedagogies, right? The sidling knowledges, the sideways. I call it crustacean complicities, pardon me, because the crustacean, the crab, walks sideways. So what are the other ways, the sidling logics that are invested with energy that we can explore?

So next year, we are simultaneously in six geopolitical zones around the world. We are running carnivals at the same time for a month, where people will cook on the streets, where grandmothers will tell stories, where priests and healers will meet people. It's our way of responding to the crisis of racial injustice and climate chaos. But the idea is, are there other fungal networks that we can stimulate and ignite? It's not about preaching to power as if power were some

¹⁰ See <https://www.dancingwithmountains.com/>

stable thing, but it's about sitting with and within the cracks and listening with big ears to what the world wants to tell us and learn with us.

Of Shamans and Sangomas: Making as Tactile Theorizing

Dylan: I desperately want to say something and I'll be quick. I'm very grateful that the shamanic thought or that Sangomas have entered this conversation. I've just come back from two weeks of performing our latest play for Empatheatre,¹¹ and we've been working for the last two years with a group of 13 young activists, six of whom are young Sangomas and one, Mbali, is a sixth-generation prophetess. In this project they are facing and transgressing issues experienced by displaced communities up and down KwaZulu Natal, who were forcibly removed from their land during apartheid for conservation, mining, tourism, or agriculture, and they've won a land claim to go back to their land. But there's now fortress conservation there, so they actually can't access it. There's a lot of corruption and power, and new monarchies were set up by the colonial government while the original monarchies are living in poverty. It's a very complex, messy situation. Added to it is that these young Sangomas, in the process of Ayothwasa,¹² all experienced sexual violence from their Sangoma teachers, so it's no longer safe to go to some of their elders in their community. There's also human trafficking up there that's got really bad and is conflated with the muti trade,¹³ which is a medicine trade, but in northern KZN it sometimes involves human body parts. It's quite dangerous up there. So this young group has been trying to realise and remake the traditions of initiating as a Sangoma, because it's no longer safe to do it the traditional way.

When you, Bayo, saw your wife lie with your son and thought about autistic knowledge guiding us, and Erin Manning's work around the *anarchive*,¹⁴ what I

¹¹ Empatheatre is a research-based theatre-making methodology. See <https://www.empatheatre.com/>

¹² Ayothwasa is the Zulu term used to encapsulate a suite of processes that are unique; however, for some traditional healers or diviner initiates ukuthwasa requires a spiritual journey, much like a hero's journey. Yet its path is not predictable or easily described, and is shrouded in much secrecy and mystery. Usually, the initiate is believed to travel under the water, often taken there by their ancestors (Bernard, 2003; McGarry, 2023).

¹³ For further discussion, see <https://www.unodc.org/documents/human-trafficking/2008/BP011HumanTraffickingfortheRemovalofOrgans.pdf>

¹⁴ "The anarchive is not something "we" do. It is something that catches experience in the making. It is something that catches us in our own becoming." See <http://erinmovement.com/goat-island-anarchive>

love about what she offers us is that making is a form of thinking, a form of theorizing.¹⁵

Working with and watching—*wit(h)nessing*—these young people make this play, create tactile theories of their lives, re-telling and surfacing the last 200 years of history from their perspective, in their own language, being with the trouble of that place, I see their brave stepping out of, or rupturing of the anthromill. Becoming fugitive from the ‘white-mans’ telling of their history. What you were describing Bayo, about these new communities, these carnivals. We've been doing something similar, in last two weeks touring this play, with over 2000 audience members who've experienced displacement, and then these post-show tribunals after the play. People just don't leave after the show. They stay for up to two hours after, just discussing, sharing, offering testimonies, storytelling. There's a new kind of—well, not new, I think it's quite ancient—a return to realizing that cultures are never static and that traditions of storytelling and place-making have always been there. Of course there are dangers of romanticizing shamanic practice, as something wild and lost far away, but actually these practices are always under constant construction, making in their time, never based on an opening shot, always iterative.

In *!Xam*, *San* and *Khoi Khoi* tradition, it's called a *dwaal* story, a wandering story, which always continues, and iteratively expands. It's never ending. It's actually Afrikaans, but it's a creolization of Dutch, Flemish, Malay, and some San/Khoi Khoi words created by enslaved peoples in the Cape Colony. So a *dwaal* is this idea of a wandering but I also like how it sounds like the English to “dwell”—dwelling in our wandering stories.

It also reminds me of *Vikalp Sangam*¹⁶ or confluence of alternatives in India, which was so transgressive, creating “containers of care”¹⁷ containers to be together for things, but they were always making something. The thing we've missed, as Ioan said, about getting out of the cognitive in shamanic work, is that no matter what shaman you meet, the line between artists and shamans is blurry; they're always making something. What are we making? What is the tactile theory that we can feel and touch, like that paint handprint on our back? What marks is it leaving in the world? On one side, we're escaping the spiral, but we must also remember the ways in which some communities are starting to spiral because they've been poisoned by other systems. Like these young people can no longer trust their shamans. They've had to create their own shamanic

¹⁵ See Manning (2016).

¹⁶ See <https://vikalpsangam.org/>

¹⁷ See Martin (2022).

practice, initiate each other, and build a whole new social tissue. Watching what young people are doing in situations like that is so full of opportunity.

The Production of Knowledge: A Graveyard of Findings

Ioan: Thanks, Dylan. I really liked that excellent explanation of your experience. It's a powerful story to tell about how we're trying to escape one element, but we can't just go back to the old. What it made me think about was this: it's a bit of a cliché, but in research, we're often thinking about the production of knowledge. That's the usual assumed purpose—that we have to generate more knowledge—when actually what we need now in the world is much more wisdom about how to act. Again, it's a bit of a cliché, but if you go back to Aristotle 2000 years ago, he gave us a really clear indication of that with his explanation of *practical wisdom*. This includes epistemic knowledge, the abstract cognitive stuff that massively dominates our universities. Plus, there's *techne*, which is an embodied forms of knowledge. An example is driving a car or riding a bicycle, which involves an embodied knowledge which you don't have to think about. It's not conscious. Then in addition to episteme and *techne*, there is *phronesis*, the knowledge about what makes a good or right end. One can drive a car for nefarious or very honourable ends. Those three things—episteme, *techne* and *phronesis*—together make practical wisdom or a wise person.¹⁸ I think your example, Dylan, is the search for a way to practice and find wisdom in that combination of things, all those three kinds of knowledge, ways of knowing.

I think that comes back again to the existential shift that we're looking for, the sense of identity and purpose of what we're doing. Is it about the production of ever more knowledge about social and biophysical phenomena, or is it about the wisdom about how to act in a world? And that, to me, is a fundamental and powerful distinction.

Michelle: First of all, I really wanted to thank you because this morning when I got up, I really thought that this would not be a good day. But I'm really moved because I cannot remember the last time when we were sharing so openly, and people were so open to sharing stories and experiences. I found this thought really freeing, that it's not about coming to terms with something. I think sometimes in this ratio of productivity, and there was a lot of talk now about products, it's so interesting what we assume as being products. Someone said they even don't like the word research anymore. I thought it was really fascinating because I would totally agree. I don't like what research has become, seeing this especially with emerging or young researchers, where whatever the words are that are being used are mostly just not matching these bright people.

¹⁸ See Caniglia et al. (2023).

It's so hard to hear from some of them, "I would love to do research, I would love to have an academic career, but I don't want to have it in this context. I don't want to adhere to these feelings of having to constantly feel like not being enough, not meeting criteria, not being sure where I'll be in half a year because there's this project and that project, and we never have time to really follow up and make sense of the projects that are there."

Bayo, you also mentioned the end of the conference. I'm mentioning this because you said, it's always this graveyard of findings. We have these Erasmus projects, for example, within the European Community. You have a high number of projects, they call them intellectual outputs, which in itself is already a really fascinating thing. They are just being uploaded somewhere and they are available. But still, somehow, for me, it's kind of a graveyard. You have to have those meetings, they are called multiplier events, transnational project meetings, you have to provide lists and stuff, and sometimes I just really wonder where is the life in that? People are engaged for those three days, but what happens then? It's a framework we have to feed into. I guess most of us don't want to but we know we don't have much of an alternative. So it was really nice to actually know that it's probably okay not to come to those terms and thinking beyond is just really liberating for me.

Now, discussing what is a valid product and how can we actually work with these, and how can we celebrate these? I really like the carnival idea a lot. Also, what Dylan said about the stories or the sharings of these young people. I mean, we don't have the tools to celebrate those or to make them available and add to our critique about what is going on. Sometimes I think our ways of communicating to the world are so limited. Even if journal outputs are open access, they might not be available to many people, given gaps in availability to the internet. I mean, we know all that. And the question, who owns those products in the end? I think it's coming back to this terminology of intellectual outputs. It's so important to consider what is a valid product.

Being Met by Other Worlds

Injairu: Yeah, I'm digesting, metabolizing a lot. I feel like I'm not sure I have words for what's being gathered here in me, the feeling of it. To do the kind of work that has the courage to veer off and be met in other ways, it almost feels like the subject of the conversation can often be what we're doing. But for me, I'm sitting with the visceral feeling in my body of the pain and the stripping and the shedding skins of the deprogramming work that allows us to step into and be met by these other worlds. I guess it's got to do with the unlearning. When you were speaking about these young Sangomas now teaching themselves, creating other initiatives, creating other rites of passage for them to belong, I'm struck by the beauty and the fragility of that space. It feels very tender, breaking open...what it takes to break open, and to really appreciate the seductiveness of the death march that still continues.

This is a big part of the work—we're being worked open in a way, and I just wanted to honor the way it feels in the body. It's not a safe space, and we can be so easily entrained to want to be received by the exact same systems that can never see or conceive of this weird other way of being. The courage, like that image of your partner laying next to her son, the courage to stay. I want to stay with that and talk more about being in that narrow space. So when we speak about the researcher being transformed in ways that we change what the subject is, it feels important to just sit with this shivering thing that we're doing.

Oliver: This is so beautiful, Injairu, and everyone. Thank you deeply. The sheer synchronicity of threads woven together in so many different expressions from so many different cultural backgrounds. Maybe to add one piece into that assemblage, connecting a bit to what Bayo mentioned about the field of inclusion, this idea of populating these baseline realities, the shibboleths of inclusion.

When I look at my own biography up until now, it has always been about spaces and places and gatherings of people labeled as populating the margins where I felt at home, where I felt at ease with laying off my mask and just being. The endeavor I'm working on and becoming with currently is this idea or this notion of trying to not deconstruct but to invert inclusion. It's in these other spaces, these subaltern spaces, places populated by freaks, by crips, where so much about these qualities, Ioan, that you talked about—*techne*, *phronesis*, *episteme*—are lived and embodied. So much can be learned when we are the ones who get re-invited to that table and are afforded the opportunities to partake in the inverting of these dynamics. I'm currently fascinated by a range of concepts to reimagine time, of crip time or crippling-time, of subtle shifts in our perception of time, of being together, about attending to and being curious about what will emerge in such spaces. Together with a group of self-advocates we are currently giving ourselves the permission of engaging in what nowadays is often framed as slow-research, of taking time to getting to know one another, of attending to every emerging issue with utmost care and attentiveness. And the amazing thing of it never feeling like time that is lost, time that is not spent effectively, but rather like something is being built up and being held collectively. So much that I heard today and that I got inspired by is making me think about where and how we can make these ephemeral acts visible, these feeling qualities, these being qualities, these qualities of solidarity truly lived.

Crip time and Crippling Time

Crip time and crippling time are two non-normative concepts to alter relationships to linear, chronological time, development, and progress, based on the lived realities and experiences of people with disability and chronic illness. Crip time acknowledges and accommodates the unique time-related needs arising from these conditions, such as additional time required for daily tasks due to mobility challenges or fatigue. Crippling time takes this further by actively reshaping conventional timelines and

schedules to prioritize these needs, rather than trying to fit disabled bodies into a rigid, ableist time structure (Kafer, 2013). Committing to crip time based on radical care can significantly impact both individuals and academic communities. For researchers, particularly those engaged in reworlding research, embracing crip time allows for a more inclusive and realistic exploration of human experiences. It challenges the fast-paced, productivity-focused norms of neoliberal-capitalist societies and academia by emphasizing the importance of rest, personal well-being, taking-time, and the rejection of ableist pressures. Such a commitment holds the potential to not only transform research practices but also to promote broader cultural shifts towards recognizing and valuing diverse experiences of time and of being in and making worlds.

Breaking the Trance: Post-Humanist Imaginations

Bayo: Maybe I'll just offer some thoughts that are springing up. I was just thinking about the milling again and one of the ways that I often explore how the trance is broken, because my work is along the lines of other scholars that I respect, is how to create emancipation openings within enclosures. I'm quite intrigued by that, which calls upon post-humanist imaginations.

The ants rarely break out of the trance. They hardly ever do. But there's been one way observed for ants to break out, and that's by infection. An ant is infected by a fungus called *Cordyceps unilateralis*, which invades the ant's body and hybridizes it, so it's no longer an ant and it's no longer fungus. It's something in between, not quite nameable. Because of that, the ant strays away from whatever trance it's in. It breaks away from its circle because it's no longer an ant, and then it goes somewhere and creates this Lovecraftian art, with monstrous forms sprouting out of its head.

This reminds me that we're not doing art, we *are* the art form of other critters. This is an invitation to be the art, being syncopated by the world in this way. I think this is especially meaningful to say because, at some level, we are all here, maybe, as Ioan pointed out, also because the prospects of AI technologies like Sora and ChatGPT are similarly modifying the space of intellectual work and art and deepening the idea of knowledge products. My sister Michelle was speaking to that a while ago, that it has to look a certain way to be considered knowledge, coalescing around the sense of the master sense.

I call it the plantation sense, where visuality is the chief sense of modern civilization. Everything is coalescing and convening here with Apple Vision Pro and all of that. I wonder about the changes and transformations already taking place that force us to revisit not just who the researcher is, but the morality that informs research and what already is implied in what we do when we say we're exploring what's real. I think right now, reality is a distraction, and maybe it's time to depart and to formulate new ethical sensibilities, other ways of being in the world, while accepting that we have never been the masters of intelligence.

That is summarily implied when we say, that's artificial intelligence and we are the natural intelligences. I think there is a sense we have to face our hubris in noticing that no, we don't have intelligence, and intelligence is a post-humanist territoriality that enlists bodies of all kinds. And we have never been the owners of this quality, so we are at a loss. We are like the children in ritual who return home and there's no one to receive them. We have to create, like the young Sangomas, and I'm really happy to be creating alongside you.

Fiona: There's so much in that question of intelligence. I think the AI question is just that. It happened the other day for a project where there's a way I like to go through and work through my interviews and transcripts, and do all the sense-making and creating, and someone said to me, "Just whack it into ChatGPT." That orientation to product—knowledge as product, as opposed to process—loses the creating which is found in the doing. I wonder if that means we have a moral obligation to really be thinking much more deeply about how we're framing intelligence and artificial intelligence, but also the idea that intelligence isn't only a human domain either. So there's all of that and there is a piece as well about departing realities. There's something really in that breaking away, that breaking from trance. I love the idea of infection. I'm looking for the wild gods I think, so it's something in this conversation that's really liberating. But I think there are some really serious challenges here. As I said before, a lot of this is not welcome. There is a lot of resistance. We are a couple of little ants. So how do we do that infecting that we need to do, or is it immunization maybe? I don't know. It's more of a question. I just feel a little bit troubled as well. I've really loved this conversation, but I also feel a bit troubled by it, too.

Ioan: I think for me, my natural modernist tendency is to go back and say, well, okay, what do I do with this, if anything? Do I need to do anything? I think that comes back to me in the reality that we are in a massive change. And I regularly, probably about eight times a day, ask myself, how can I support the systemic changes that we need, rather than just stand and watch. And I don't know the answer to that. I continuously verge between wanting to act in some way and then also going, well, this is what it is. So, is it then about how one transforms oneself to just become part of the shift? A lot of Indigenous cultures will say we're in the 'great culling.' And we know that to create something new, we have to allow things to die first. So, at what level does one simply accept that we are just in the collapse of the old system?

For me, this conversation has been helpful because I think it's actually added to my sense that our current knowledge, formal knowledge institutions, are not going to make it. They're increasingly becoming irrelevant. I was talking last year to a CEO of quite a large philanthropic organization whose trustees say, "don't touch the universities with a ten-foot barge pole because we are not interested in action". The costs for me operating through a University to do research are astronomical. When we put a bid together its super expensive. So this raises questions about—in a world of massive change—is our University-based, expensive research inappropriate and even unethical, and partly because

what we are often doing is perpetuating and reinforcing the systems that aren't working. By doing research in our current form, are we just propping institutions up that are going to eventually fail?

So the question then is, what do I do with this and how do I personally take responsibility for, and ownership of the problem? I think it's confirmed and added to my sense that there's a limit to what I'm going to be able to do in the current institutions that I'm in, and that just means I have to accelerate my focus on other activities that I feel are meaningful. The other thing it has reminded me to do is to try and bring my senses more into some of the conversations I can help lead, despite the very busy world of being a senior manager in a department with a large workload. This conversation has just reiterated that we are living in a weird and crazy world of continued efforts to keep a sinking boat afloat. What are we doing? What's our purpose? We're not stopping to step back and say, why are we doing what we're doing? We're doing it just to sustain the systems that are increasingly no longer working.

Oliver: Thank you. Looking back at our time together, I won't even try to synthesize. Ioan, thank you for having done that; that was great. I feel deep gratitude for our time together.

Megan: I express my deep gratitude to all of you for accepting the invitation. In preparing for today, Oliver and I went into our usual inductive process of, "Well, of course, we're not going to define transformative research. Who would, and who would want to?" So we said, "Well, how are we going to work it inductively?" What are these emergent phenomena that we're seeking to uncover through our (research) practices? How do we not productize them? How do we not domesticate them? How do we not appropriate them? How do we not colonize them in turn, but call them something else? I fully appreciate the provocations that we've offered to one another.

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