



# Co-creating Effective and Inclusive Organizations

Putting Equity, Justice & Heartwork  
at the Center of Whole-Systems Change



KNOWLEDGE DESIGNS TO CHANGE  
LLC







CHANGE

MOVEMENT

LOVE

JUSTICE

FREEDOM

INQUIRY

EFFECTIVENESS

EQUITY

IMPACT

COMMUNITY

KNOWLEDGE

GIVING

INCLUSION

DIVERSITY

TRANSFORMATION

HUMAN RIGHTS



CO-CREATING  
EFFECTIVE &  
INCLUSIVE  
ORGANIZATIONS

CEIO's core intention is to support community-serving organizations and organizers to fully embody inclusivity, justice and conscious co-creation, thereby inspiring, encouraging and expanding the wider practice of these values within the communities they serve.



Knowledge Designs to Change is a strategic research and learning practice serving the social sector. We believe that every change effort, no matter what size, operates in a network of potential and can help build a more engaged and equitable society. Figuring out how to change and how to contribute to deep structural change is what we call knowledge work.

## ACKNOWLEDGEMENTS

Special appreciation goes to the inquiry team that, together, co-created the inquiry intentions and shared so energetically from their lived experiences in the CEIO transformative endeavor. Their involvement is woven through this inquiry - in the methodology, the data, the analysis and the interpretation.

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## A Word from co-founders, Bill Graustein & Niyonu D. Spann

Ten years ago, when CEIO was first launched, the New Haven community soil was well cultivated. The programs sponsored by Bill Graustein - the Community Leadership Program (CLP) and Story Weeks (Story) - were in the early stages of awakening the potential for a courageous community. CLP and Story offered opportunities to strengthen inter- and intra-personal effectiveness. They invited community leaders into spaces designed for authentic communing through story-sharing, values affirmation, personal growth and professional networking. Adaptive and heart-centered leadership was expanding and this led naturally to a desire for the same qualities to be nurtured within local organizations and throughout wider community life. The founding of CEIO was a direct response to that collective yearning for heart-centered, courageous and just ways of being and strengthening the structures and practices of our shared work.

Bill and Niyonu met when Bill was a two-time participant in a 5-Day workshop that Niyonu designed called, *Beyond Diversity 101 (BD101)*. BD101's intention is to create a space for moving beyond traditional "Diversity 101" courses. It invites and incorporates body, mind and spirit. The workshop centers movement and bodywork designed to release patterns locked in the body. It features practices that tap less visible ways of knowing, knowing that may come through nature, ancestors, meditation or other spiritual practices. These practices and BD101's core technology - Conscious Co-Creation - became the foundation of CEIO.



Our intention for CEIO has been to engage whole organizations within a specific geographic community. Participants' learning is linked to their interactions at work and through the work they do, in service to community. By centering the learning within the organization, the organization as an organism develops the practices of co-creating an environment for mutual and continuous learning. The focus is on whole systems change that occurs deep within organizations at the same time that it permeates throughout the wider community.

Today, we can witness that CEIO (Organization Partnerships, Deeper Change Forums, Programs for Youth and Community Organizers) has joined CLP and Story to offer frameworks, laboratories, inspiration and the encouragement for community-led movements to grow from individuals and organizations that are aligned across values and practice and are continually becoming more just, more loving and more whole.

Our hope for this Inquiry, skillfully guided by Dr. Angela Frusciante of Knowledge Designs to Change, is to make more visible and accessible the inner workings of CEIO and illuminate what it takes to co-create whole-systems transformation. Each CEIO partnership has required an openness to learning together. It has taken risk, fortitude and radical truth-telling. It is our intention that, as we learn, we will be more effective through sharing openly and strengthening our commitment to one another on this collective journey to be more equitable, more just and more heart-centered.

*Bill & Niyona*







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In memory of Sonja Ahuja who passed in May, 2020.

Sonja served on this report's Inquiry Team,  
the CEIO Capacity Building & Training Partners and  
on the original Project Development Group.



# SUMMARY

## Co-creating Effective and Inclusive Organizations

### Putting Equity, Justice & Heartwork at the Center of Whole-Systems Change

Co-creating Effective and Inclusive Organizations (CEIO) is a unique, New Haven-centered initiative co-founded by Bill Graustein, a former academic and New Haven-based philanthropic community funder, and Niyonu Spann, an experienced equity educator, organizational development and change agent, and activist.

The idea of creative agency and “co-creation” is the starting point, the grounding, and the center of CEIO’s vision.

We envision communities where the voices of all members are included in shaping their personal, family and community life. Community members are empowered to influence and make change within these circles, and are supported to do so.

Community serving organizations and organizers provide this support and sustain this creative agency, inviting community members to bring themselves fully. Their powerful stories and their practical needs are engaged and responded to with heart, integrity and justice. Community serving organizations and organizers act with loving responsibility to all.

CEIO is a living practice in conscious co--creation and loving responsibility to all.

(April, 2015 revision)

CEIO seeks to encourage consciousness in co-creation to support active transformation in the face of various forces of oppression – power structures, cultural systems, internalized beliefs, and social conditions such as poverty, racism, and sexism – that act against our sense of individual and collective agency.

In 2018, CEIO commissioned an inquiry process to understand and clearly articulate the inner workings of the CEIO work and to describe its effectiveness and impact.

## EFFECTIVENESS:

CEIO’s effectiveness can be understood in various ways:

- In its **programmatic** form, where capacity builders in multiple service roles work to enhance partner organizations, organizers, and the broader community;
- As a **community of practice**, where various participants that engage in community work are brought together to share and reflect as a process of continuous development;
- In its role as **amplifier and network connector**, bringing together people and concepts in a way that activates change while simultaneously supporting change efforts; and
- As the embodiment of **social movement-building energy**, grounded in a transformational curriculum as it shows up “in place.”

Unlike traditional forms of evaluation, the inquiry methodology needed to align with CEIO values, to be flexible enough to work alongside a continually evolving transformational process, and ideally, to be engaged as a gathering of people from inside the CEIO work. The inquiry needed to go beyond documenting the information about CEIO toward identifying spaces and pathways where dialogue and conversation are continually building CEIO. In this way, the inquiry process itself could become an aspect of achieving effectiveness as much as an exploration or observation of impact. This meant method integrity would be determined by how much the inquiry itself embraced CEIO ways of being.

## SHARED INQUIRY

An inquiry group was formed of CEIO core team members, members from partner organizations and community organizers. Attention was given to the diversity of the group in categories such as age, race, gender, sexual orientation, positional status, role, education, economic levels, and field of training. Of course, variations in experience and perspective were also expected.

The group process began with the adoption of a guiding archetype, or symbol of reference, and we chose to use the spiral to start our inquiry. The spiral is a geometric archetype that can be found in nature and science and ancient cultural imagery. It was important that it be a geometric archetype, rather than one that takes a human form, so we could begin from a notion outside of a dominant ideology human story. The spiral was particularly appropriate as a grounding for social movement understanding as its motion is simultaneously pulling inward and expanding outward. The spiral was embraced quickly by the inquiry team as it was already an image very present in the CEIO work.

The group engaged in exploration of notions of truth, inquiry, and research, and developed intentions from activities about story and how the group wanted to show up together and in the world. Even in the beginning, observing this group starting to articulate an experience of a very deeply structured approach to social change confirmed for me that CEIO involvement was creating an emerging shared practice.

## INTENTIONS

From our discussions, the inquiry group developed intentions that would guide our interactions and process inside the group and also provide standards of trustworthiness and credibility of process with which others could hold us accountable.

Taking steps back, slowing down, and being in a new relation to these ideas (data, inquiry, analysis) even when we have reactions to the language and what has been done in the name of research. Staying in when it is uncomfortable.

Stating our own reactions and our own core/root beliefs is part of the analysis process.

Our physical selves are a connection to the world. We engage through our bodies and listen to our bodies in the analysis even if words do not come initially or at all.

Accepting the wholeness of how people share information and not separating out what initially seems important to us. We embrace the lived experience of people and how they express that experience.

Sharing information from the past, developing a shared language and describing terminology are all crucial to our process.

Openness to the totality is what brings deeper understanding. Seeing the complexity and the wholeness even when it is overwhelming. Our minds have a tendency to break things apart and put them into categories. We often rush to identify what is useful and throw away the rest. We recognize this tendency and want to practice keeping all of it in for longer as we make meaning together.

The inquiry group brings multiple perspectives. We share these perspectives in our meaning-making. Engaging in a practice of connection, we stretch ourselves toward deeper understandings by identifying patterns and being, while staying open to an expanding sense of truth.



With the inquiry process attuned to the intentions of the group, we then sought to “bound” the data to the group’s lived experience. This involved creating a database from the artifacts and events that the group surfaced in relation to their CEIO engagement.

The shift from writing *about*, to understanding from *within* CEIO, prompted us to capture experience in a new way. The various CEIO interactions and the artifacts that are connected to these interactions can be considered the primary “text” of the CEIO work. This may seem like an esoteric distinction, but there is a critical difference between observing the doing and encountering being. Engaging in conversation as an analysis of lived experience enabled us to “discern” together in dialogue and create a group of change constructs as our final analytic layer in our process.

## CHANGE CONSTRUCTS

While “themes” are often presented by researchers as the important ideas of what has happened in the world, change constructs are a bit different. Change constructs are those occurrences that we notice happening over time that the group believes need to be understood and further unpacked during transformational change processes.

Change constructs thus are not indicative of *what is*; they involve naming understandings as they develop over time and across context. They are in service to what *could be*. In this group approach, the value judgment of naming constructs was grounded in the experiences of the change practitioners as they reflected on CEIO and their efforts to move toward greater equity in one urban community.

This report includes information about the inquiry process and the insights around various change constructs that can be used to deepen and strengthen transformational change efforts. The constructs, along with illuminating quotes by inquiry team members, are shared next.

### RESISTANCE

“If there’s no resistance, how do you move....[when] that resistance was lost, people didn’t have a honing mechanism for what they were trying to do.”

### ROLES

“I see a web with roles in the middle and all the different ways that we talk about it and things it could mean – with just words and phrases – that would be a really useful visual to see the variety that centers around roles.”

### STRUCTURING WITH AN EMPHASIS ON CODIFICATION

“Is the difference [that] codification is a specific process [and] structure is something that guides our decision making...codification can be ossification and not change at all”

### EXPRESSIONS WITH A HIGHLIGHT ON LOSS

“The same truth that hurts is the one that heals.”

“Disruption is powerful and hard to watch sometimes.”

“I know these people. It hurts.”

### ACCESS

“It reminded me of when I was young and my grandma would tell us about our history.”

Reflecting on the list of constructs, the group noted that there may be a mis-perception about the importance of “power” in the constructs as it had not been named as a separate construct. We realized that for us, understanding power was at the center of each of the constructs.

Even though the inquiry group recognized that there were more constructs that we could have generated, there was a shared sense that what we had surfaced was indeed important and relevant beyond any individual’s context. In our last conversation, the group talked about the change constructs and questioned their applicability to each of the CEIO programs. We closed the inquiry work with a comfort that, although another group of people going through the same inquiry process might have yielded different constructs, the

value of the constructs this group surfaced resonated beyond the CEIO work into other contexts where members were involved. We ended with a sense of momentary completion.

## MOVEMENT BUILDING

While the overarching question that guided this inquiry project was, "How does CEIO show up in the world?" or "How does it manifest?", throughout the process it was important to recognize that there are multiple questions tied up in that overarching one, including:

- **How change efforts are greeted in practice**
- **How a change curriculum enables change efforts**
- **How change workers notice and name progress**
- **How change practitioners understand and support each other across oppressive structures**



This report serves as a first layer to responding to these questions and to understanding CEIO effectiveness within the context of transformational process and social change movements. Through these questions, CEIO can continue to emerge as more than a philanthropic strategy to be replicated, and rather as a calling to be answered. We can deepen our understanding of CEIO as an embodiment of transformation with the expansive potential to energize hubs of change that can both tap into the CEIO experience, and yet adapt those lessons to other specific places and investment structures.

It is apparent that there is a desire amongst a broader circle of participants for continuation and expansion of CEIO experiences. I would not be stretching too far by saying that there is a "longing" for CEIO to reach deeper and further, much as historic schools of change (e.g. Highlander, Industrial Areas Foundation) have done.

Relating back to the spiral motion – continually pulling inward while expanding outward – it is easy to embrace CEIO (with BD101 curriculum at its core) in its social movement potential as a consciousness and leadership expanding effort that embodies the key aspects of shared language; common experiences that lead to embodied memory, commitments and mutual care; connections to mind, body, and spirit; analytic frames for understanding self and the world; and a culture of being that supports healing-based action.

As such, CEIO not only provides a useful place-based demonstration of organizational development, philanthropic investment, and community change – it also perhaps provides one way forward for the transformational change so needed in our current local, state, and national contexts.

*Photo credit: Tom Ficklin, Deeper Change Forum: From Genocide to Generational Continuity presented by Lisa Graustein, September 29, 2016*



# BACKGROUND



Co-creating Effective and Inclusive Organizations and Organizers (CEIO) was founded through a partnership that brought together the organizing, teaching, and leadership talents, experiences, and tools of Niyonu Spann with the care, compassion, and commitment to residents of New Haven which lies at the heart of Bill Graustein's family giving. Niyonu is an equity educator, organizational development and change agent, and activist. Bill is a former academic and social change philanthropist and longtime New Haven resident known for supporting community nonprofits and leaders in New Haven, Connecticut.

This report is an invitation to readers to take a journey. It starts with a sharing of the creation and intentions of CEIO. It includes documentation of a shared inquiry process, along with the methods used, whereby change agents co-designed a process for constructing knowledge from their lived experiences. The report then loops back to illuminating various aspects of CEIO effectiveness.

The report, while it may inform philanthropic strategy, organizational development processes, community building and place-based social justice efforts, is not shared here as a model or for programmatic "replication" of the parts. Rather it is the learning and underlying principles and practices that are illuminated that present opportunities to be embraced across time and context.

Each reader will find their own way of engaging with the report. This may be linear or not. It may be at one sitting or not. It may be an individual journey or shared with friends within a change process itself. It may seem at times like shedding of long held beliefs about knowledge and truth and approaches to equity. At other times it might feel like playing with one's own meaning making and experience. The report, as held through the inquiry group's intentions, is explicitly not about closing ideas by defining a single truth but rather about greeting concepts with an openness that welcomes each new partner who joins the journey.

## CO-CREATION

The idea of creative agency and “co-creation” is the starting point, the grounding, and the center. It is what academics call ontological, which means that it involves a basic understanding of what is real. From ontology comes our individual and community values, practices and frameworks for understanding the actions and events around us, and our own meaning-making within us.

In CEIO, co-creation just “is.” It is happening all the time, as each person is always participating in forming the world. Co-creation, engaged in consciously, is the desired action.

### In Bill’s words:

*The experience of co-creation involves imagining something that you couldn’t imagine before and the root of that imagination ... the sense that something will emerge that is not the (original) thought of any one person but has that surprising element of emerging in the group for the first time and being recognized as connecting with those present. (Graustein, 2010)*

Integral to this notion of co-creation is the belief that human beings have agency, which is the power to think, act, observe, reflect and create. Agency is innate.

*I think of creative agency as an aspiration for a community. Creative agency in a community has several dimensions: practical (how do we address this challenge), spiritual (how do we more fully recognize both our own and others’ humanity), inventive (how can we approach this differently than we have before), collaborative (what do we each have to do to bring this into being), attitudinal (how do we regard others - as potential resources or as threats - and how are we accountable to each other?). (Graustein, 2010)*

However, various forces of oppression – power structures, cultural systems, internalized beliefs, and social conditions such as poverty, racism, and sexism – act against our sense of individual and collective agency. The desire within CEIO is that humans embrace their agency and consciously co-create rather than interacting passively or haphazardly with others and the world. Consciousness in the face of both our own power and the structures and forces around us is essential to implementing a transformative process.

CEIO seeks to encourage consciousness in co-creation through shared identification and to support active transformation of these forces of oppression.

*Conscious Co-creation is the core principle of CEIO. Conscious Co-creation is to operate with an awareness of one’s individual AND organizational participation in making things the way they are. It is about responsibility AND it is about the use of power. This principle requires telling the truth about how individuals and systems used their power in the past and how individuals and systems are currently using their power. This principle offers the opportunity to use power more consciously and with greater justice.*

*To engage a process intended to shift fundamental ways of being is an act of great courage.*

*Organizations, grassroots movements and dedicated community members need added supports as they engage this heartwork. CEIO offers training, coaching, funding and the central support of a community of practice. The community of practice is the grounding and assurance of sustainability in this work. By meeting across the various CEIO partnerships, the community of practice will offer a way to develop a shared repertoire of resources - experiences and tools that can increase collective competence and accountability. (Spann, 2016)*

This report is located conceptually in the post-pilot phase of CEIO which officially began in 2014. In documenting “core assumptions driving our work and theory of change” and specifically the shift from pilot to post pilot efforts, **Niyonu shared:**

*We live in times when neighborhood life, the economy, our environment, public education, and healthcare—our society’s circulatory systems—are in crisis. “We worry about poverty, hunger, and the quality of the food we eat; the degeneration of our cities and the education system; race politics and injustice; human rights and torture during an age of terrorism... in America; capital punishment and a blighted penal system...and the politicization of our courts” (Moyers, 2011). These challenges are born of and sustained by patriarchy, capitalism, hetero-sexism, white supremacy and other systems of domination.*



*Clearly, we need fundamental change, and fundamental change requires that we shift the mindsets that hold current policies, procedures and attitudes in place.*

*Co-Creating Effective and Inclusive Organizations (CEIO) set out to respond to this need for change with a focus on the city of New Haven, CT. A first step was to learn from New Haven community members.*

*Through interviews, they expressed clear opinions, describing what they see in their communities as the greatest dysfunctions or challenges to be faced and the greatest strengths to be embraced and expanded...*

*...The interviews showed that people lament a deep-seated dysfunction, and though they may attribute its causes differently, there was evidence of a yearning for significant and lasting change—change that is sustainable and that results in equity and well-being throughout the community.*

*Fueled by the wisdom and passion expressed through these interviews, in 2011 we launched a two-year pilot at a conference called *Inviting and Exciting a Deeper Change*. The pilot was rich with starts, stops, adjustments, missteps and moments of great pride. The learning was tremendous and from this learning in 2014, we began the post-pilot CEIO work. We've attempted*

*to make adjustments to the overall CEIO offerings while maintaining the integrity of the founding principles.*

*Overall, the core assumptions and theory of change presented in the first 2010 draft of this document hold steady. They continue to provide the foundation for this work. The revisions that I've made to this and previous drafts are an attempt to share, with greater clarity, the roots from which CEIO draws its sustenance. (Spann, 2016)*

To create and sustain systems that are life-sustaining for all requires the elimination of practices, policies, and most importantly, root assumptions that marginalize some while giving others great importance and access. "To build community requires vigilant awareness of the work we must continually do to undermine all the socialization that leads us to behave in ways that perpetuate domination" (hooks, 2003). Much of the work involves seeing anew. (Spann, 2016). In philanthropic and nonprofit terminology, CEIO is a "place-based initiative." This simply means that context matters to how change happens.

**For more information on New Haven as the local context, see APPENDIX I.**



Photo credit: Maza Rey, Deeper Change Forum Dr. Joy Degruy: Racial Justice And The Urgency of Now | November 14 & 15 2018

## WHOLE SYSTEMS CHANGE

For CEIO, the notion of whole systems is multi-layered and grounded in an understanding of the ecology of an organization itself. It applies to working not just inside community organizations, but externally as well. It also relates to thinking about cultural change broadly and holistically. It seeks to work with an organization in its entirety, where there exists the autonomy and power to change organizational structure itself. This lens makes it imperative that the work of effectiveness and justice be done in partnership between the board, the executive leadership, and the staff of organizations.

*Community wholeness and well-being is achievable through intentional, transformative planning that focuses on inner and outer change, that “invites a change that is so deep that a return to the previous conditions is utterly inconceivable” (CEIO Deeper Change Forum as cited in Spann, 2016).*

*CEIO Vision Statement...these efforts to work out new principles of organization and consensus signify a growing realization of the unity of the internal and the external. It isn’t simply about demonstrating one’s virtue by being egalitarian or inclusive. It is that who we are and how we relate affects what we create.” (Spann, 2016)*

This concept affected CEIO as an organism in terms of its components and activities and how CEIO itself was managed. The pilot phase gave the opportunity to put into place and practice simultaneous program components and highlighted the level of effort needed to work with a whole systems way with partner organizations. **For more information about pilot phase activities, see APPENDIX II.** The implementation phase illuminated the practice of working through a whole system approach and embracing a knowingness through practice.

## KNOWINGNESS AS THE CORE OF INQUIRY

Niyonu brought her framings of knowingness into the center of the inquiry work. After conversations with Niyonu, I documented my understanding this way.

*CEIO is now fully into implementation and seeking to build on its existing reflective practice and further breathe into the “knowingness” of the work. In the language of CEIO, knowingness is about being and being present, noticing, and building a deeper sense of “what we are up to.” In my conversation with the CEIO team and watching Niyonu as she leads and talks about the work and knowingness, it also seems that knowing is about connecting, through one’s heart and inner sense, to the earth, to one another, and to divine purpose. (Frusciante, 2017)*

The intersection of the factors above, when CEIO moved into full implementation, led to a need for an approach to understanding impact and effectiveness that was not yet known and thus could emerge from within the core of CEIO. The approach was multi-layered. Niyonu guided all design decisions and was the primary sounding board and ultimate decision maker on all things related to the contract. However, I also considered the members of the inquiry group (to be described later) to be “clients” in that their perspectives on the success of the contract were extremely valuable, as was their full participation and contribution. I understood that I was the “outsider” of this community and needed to respect the parameters through which I was invited into the community. The group made decisions along the way as to how to be together, how to approach data, and we analyzed that data through group dialogue.

Through me, as the research guide, there was also an interaction with an outside body of knowledge related to methodology. I was continually gauging our data and analysis processes with a broader sense of how interpretive social science inquiry is conducted. The approach to the inquiry design thus emerged both through a field of inquiry practice and in partnership with the CEIO group.

# THE INQUIRY GROUP PROCESS

## INQUIRY AS A WAY IN

The first step for my entering the CEIO inquiry was to understand – as deeply as possible – its component parts and internal structuring. I was searching for an emergent possibility that a knowledge process could tap into, open up, support, or encounter. **For more information about Knowledge Opportunity Scanning, see APPENDIX III.** This engagement was never set out as a traditional evaluation. There were no benchmarks, specified measures of achievement, and no participant perception data to use to “prove” success. Some theory of change documentation had been done within CEIO, but it had not been fully embraced as the analytic structure through which to illuminate impact. However, the process of stating assumptions sheds light on the beliefs about connection between effectiveness, creative energy, and inclusiveness.



**Niyonu states:**

*Author and educator bell hooks offers that “...one of the most intense political struggles we face—and greatest spiritual struggle—in seeking to transform society is the effort to maintain integrity of being” (hooks, 2003). CEIO agrees with hooks’ statement and sets its goals on aligning who we BE with what we DO. We contend that greater mission-effectiveness will result when organizations recognize, shift and eventually eliminate the internal blocks to fulfilling their part in serving the highest good for the whole community. In working to eliminate internal blocks, organizations (and individuals) begin to unleash energy that has been held back by the blockages. The result of this work and “energy unleashed” is a greater capacity to think and act truthfully and strategically in meeting organizational goals and objectives.*

**And**

*CEIO emphasizes skills that allow for increasing the opportunities and ability to share creative energy.*

*In fact, we see effective leadership directly tied to the ability to create opportunities for people to do just that—share their creative energy. Creating such opportunities allows for the fullness of people’s stories—their life experiences—to positively, richly inform the questions or creation at hand. It also opens a channel to fuller participation in decision-making. Creating, sustaining and participating in these spaces of shared creative energy is the living expression of justice, of being whole.*

**And**

*When we use the term “inclusive” we are meaning much more than diversification in representation. We mean more than “diversity.” Achieving “diversity” or a representation of people from diverse backgrounds throughout the organization is a significant indicator when seeking inclusiveness. The important distinction we are making is that in a truly inclusive organization, strategic thinking and planning incorporates the life experiences, realities and perspectives of all people in the community. “Their powerful stories and their practical needs are integral parts of the standard in organizational excellence.”*

*It is uncommon to position mission-effectiveness and inclusiveness as interdependent. We hold that when an organization’s mission is in service of community, its effectiveness correlates directly with its inclusiveness. Therefore, policies and procedures need to reflect this reality. (Spann, 2016)*

Much as CEIO attended deeply to its organizational partners, internal intentions also reflected this commitment. Entering into the inquiry work, I sought to paint as full picture of the workings of CEIO as I could, in order to see the ways that the ideas of effectiveness, creative energy, and inclusiveness were engaged. The approach to illuminating CEIO was to engage in an inquiry group whose individuals came from various places, and intersected in diverse ways, across CEIO operating and programming.



## SHARED INQUIRY

Following the knowledge scan, it became very clear that the CEIO way to engage any knowledge building would be through a group process. I suggested a meeting structure and associated stipend and shared the characteristics I felt should be used in forming the inquiry group. I was transparent that some of these had as much to do with my perceived skills as the work of inquiry itself. These included:

- Interest in inquiry
- Willingness to engage
- Literacy at high school level/English reading and conversational proficiency
- Diversity as desired throughout program - age/gender/race/role
- Energized by self-reflection and listening with others
- Range of talents welcome from conceptual to pragmatic, from detail to holistic...
- Openness to mind/body/spirit conversations from a non-religious/non-dogmatic perspective
- Desire to work with concepts of structure and equity in knowing and knowledge production

To engage in a co-creative way, Niyonu suggested a team of individuals who had been involved in CEIO as capacity builders, team members, and organizational and program participants. Niyonu intentionally identified individuals with specific attention to the diversity of the group in categories such as age, race, gender, sexual orientation, positional status, role, education, economic levels, and field of training. Of course, variations in experience and perspective were expected.

We extended a formal invitation to which the following people accepted, becoming the CEIO inquiry group.

**Erin Livensparger, Isa Mujahid, Judy Meikle, Kimball Cartwright, Nataliya Braginsky, Sarah Tracy-Wanck, Sarah Derbala, Seth Poole, Sonja Ahuja, Tyree Dickey, Victoria Pearson.**

Sarah Derbala was an engaged participant initially but left due to outside constraints before the data analysis process. Isa Mujahid was a member throughout the inquiry process, but due to organizational responsibilities and unforeseen scheduling conflicts, he was not present during much of the data analysis portion of the inquiry process.

The initial framing that I shared with the group during introductions included the following as my assumptions.

- CEIO is a curriculum (added later that CEIO is a curriculum in practice)
- There is not one story of CEIO - there are multiple stories of CEIO
- In each part there is the structure of the whole
- Understanding impact is illuminating how the work manifests or shows up in context
- Through a shared inquiry process we will make meaning together of the curriculum
- Each, in our own way, will represent that meaning, through our own sharing
- We continue to consciously co-create from an even deeper "reflexive" understanding -- cause and effect are not so clear -- circling back around -- emergent

Any description I could give of what would follow would inevitably make our inquiry process seem linear and seamless. It was far from either. There were multiple occasions when I started down a path only to realize that the path was not aligning with group intentions (which I committed to embrace). I sometimes tried to rush the process or asked the group to take part in a mind-driven activity when a more emotive and dialogue-centric process was more suitable to the group. More often than not, if I was trying to hold too tightly or facilitate too rigidly, the group would challenge me to trust the group to do the work of the inquiry. At the outset, I gave the following scaffold for our work together.

**PREPARING****MEETING AND GREETING EACH OTHER****STAGE ONE****Ways of being and working together**

- Examine our own assumptions re: trustworthiness
- Share an archetype for our process
- Ways to engage together
- Some common understandings and tools to use

**STAGE TWO****Exploration**

- Bringing in information – making it data
- Dialogue – analysis – linkages, structure, patterns
- Making meaning – synthesis stories

**STAGE THREE****Representing**

- Speaking truths
- Drawing in
- Expanding out

**STAGE FOUR****Reflecting on the process – summarizing**

Although this general framing held throughout the inquiry, the shared inquiry process, as it evolved, incorporated the following aspects, not as phases, but really throughout the entire process:

- demystifying knowledge;
- honoring lived experience;
- bounding a dataset as a case;
- questioning through dialogue; and
- understanding our process as a hologram where every part contains the reality of the whole.

**ENGAGING THROUGH INQUIRY**

Our very first meetings as an inquiry team centered on discussions of whole self. I emphasized from the start that whole being was valued. In fact, as a facilitator, I resisted asking the “where do you work question.” Interestingly, it wasn’t until weeks into the process that I realized that I did not know who had worked in which partner organization or program area and some participants didn’t realize that they were going to be asked to share information about their organization’s experience with CEIO. For some, the lack of explicit naming of organizational affiliation combined with the agreements of group confidentiality meant they had never even talked to their supervisors about their participation in the group. Fortunately, the purpose of the inquiry was to tap into lived experience and no individual was asked or expected to “represent” an organizational perspective.

**Rather, I asked participants to journal and discuss questions like:**

- **Where do you sit in the world?**
- **What do you experience around you?**
- **What do people need to know about the work to understand your being in the work?**
- **What do you see, feel, hear around you on a daily basis?**
- **What makes things “true” in your world?**

We also began with a questioning of knowledge and research and the embodied reactions that surfaced memories of childhood, alongside recognitions of the oftentimes negative impacts of elite forms of intellectualism and institutionalized research done “on” and “to” non-dominant communities.

The following notes are excerpts from participants who responded to a journal request asking about notions of truth. I include them here uncut as an introduction to the depth of conversation that began our process together. They also demonstrate the way in which CEIO frames permeate the group’s discussion. Phrases like “petal level changes” refer to analyzing a situation through CEIO’s flower framing. The flower framing is derived from work by transformational practitioner and scholar, Dr. Darya Funches.

**NATALIYA:**

*Things are true to me if there is evidence to back them up (wow, that's such a social studies teacher answer to that question). That evidence can be personal experience, history, or statistics. Statistics, of course, can be manipulated, and actually so can experience or history, depending on who is telling it and how it is being used. So for me the source matters a lot. Whose truth is it? Is someone else's truth necessarily my truth? Are there objective undisputed truths?*

**SETH:**

*What makes things true in my world are actions. What is being done speaks much louder than what is said. Truth can be proven if people dedicate the time required to [pause] I think most people think things are true if they feel or seem true. Many people believe things to be true if others have said it is true, especially if people have said it is true for a long time, or if people in positions of power call things true. Other people around me question more, and do not believe things to be true unless they have experienced them or seen for themselves.*

**ERIN:**

*White people are happy with the power they have but may not say it that way. If people work hard and follow the law they will do just fine. Why don't "they" work harder? ... At work white folks talk about a social justice lens and we talk about how we have to do the CEIO "work" and it is hard and we are trying and I see people of color tired, frustrated, and burdened with explaining that it is life not work and I see burn out all around from the trying and explaining.*

**JUDY:**

*Something seems true if it validates our experience of the world (our worldview) and we get uncomfortable if that reality is challenged, particularly people of the dominant culture. Asking them to be open to alternative truths - different narratives about their whiteness and racism - disrupts their comfort. Do people feel comfortable discerning truth as a heart-led process -- tuning into feelings and trusting intuition? Do people discern truth with hindsight ("reaching back for truth")? Is it a relative concept - as in the opposite of false or wrong - or an absolute goal of perfection to be aspired to? Is truth the ultimate goal of inquiry, requiring data to support its existence?*

**TW:**

*Some of the things that feel very true to the people around me: the way in which equity and inclusion efforts can allow white people, men, owning class folks in power to maintain power by integrating use of diversity language. The ability to make subtle shifts, petal level changes to how they operate. Without impacting the roots. Folks in power are very good, very adept at updating the systems to stay ahead of the game. A friend of mine wrote on social media something about the "anti-racism racism," which is a twitter-verse way of summing up this dynamic....Not all change is "root-level change", Niyonu once said to me, to my horror and despair. This sort of sums up for me my main challenge in this time. What feels true to a lot of folks around me is how much we need alternative mechanisms for navigating these situations together.*

understanding transparent  
**TRUTH**  
 RESEARCH trustworthiness  
 organizations  
 intention **VOICE** interpretations  
 responsibility acknowledgment



**KIMBALL:**

*Truth, so many layers to the onion! Truth feels like what's at our core, what drives our lives. Truth is developed by what we experience directly and woven into those experiences are the stories we consciously or unconsciously reflect on, stories of truth we share and receive from other people, groups, or society. Truth is what we use to make predictions about how things might turn out, or as a lens through which to interpret events in our past. Truth is not conveyed through statistics, though statistics may offer an illustration of truth when they are anchored to a story.*

**VICTORIA:**

*At this point I'm really looking to nature for truth. I believe what we see as true is what makes up our understanding of reality, and when those understandings connect it is a real opportunity to build power and create change, but if I'm looking to something for truth, it's nature. And even that is through my own perception, so truth for me is deeply mutable and internal. I just don't think any individual has too much access to it in some kind of ontological or objective way. I always say that education is grounded in bias/belief, and our task is not to remove it, but rather to be honest about it and let folks engage fully with their bias and perspectives in the complex task of creating meaning in our world. One last piece in this understanding of truth. It is necessary for me to believe other people's truths, in order to build a co-creative reality. If I believe in myself as the center of truth, then I am simply re-creating domination systems. In my relationships, my family, my work, everywhere.*

*But truth is something we come to together and that creates new meaning. So truth is mutable is changeable and in a co-creative non-domination context, we come to it together.*

**TYREE:**

*I have found that my religious community often and solely believe what is in the bible to be "absolute" as it relates to truth. John 14-6 (God is the way the truth and the life) from only that lens or standpoint will they acknowledge or accept truth. Sort of like...If God said it, then that settles it! My family especially those that are "super saints" wear this truth as a badge of honor or a weapon of mass destruction (depending on what side of truth your standing upon lol). This biblical truth represents that they are in right standing with God for they are the only ones being, believing, and living the right way. This governing system keeps them in place or in line so to speak-which also tends to be the driving force or breeding ground of harsh and critical judgment that they use to condemn or judge others by (myself included) who do not share the same interpretation of truth.. I hate it so much because the core belief and value is in such contradiction and conflict with who they say they be and how they show up.*

*Since it is clear that everyone engages in inquiry through their own past framings and experiences, it was important to move into shared inquiry with a shared archetype that we could draw upon as we tried to come together in shared meaning making.*



*Photo credit: Maza Rey, Deeper Change Forum Post Session Affinity Healing Group*

## WORKING FROM AN ARCHETYPE

An archetype is

the original pattern or model from which all things of the same kind are copied or on which they are based; a model or first form; prototype. (In Jungian psychology) a collectively inherited unconscious idea, pattern of thought, image, etc., universally present in individual psyches. A recurrent symbol or motif in literature, art, or mythology (wordreference.com).

Dominant archetypes surround us. They show up in literature in how we portray a story. They show up in art and architecture. They often spark relationships in the subconscious and can be used consciously to draw people into an existing narrative. They show up in history and in how we characterize processes of change. One example is the image of the lone male hero saving the day - George Washington crossing the Delaware, Superman saving the falling damsel in distress, even the national Martin Luther King Jr.

monument that portrays the civil rights movement through the towering image of the lone man.

An example of a geometric archetype is the triangle which is represented as a structure of strength. We see it on U.S. currency, as the symbol for the Masons (a society of many of the “founding fathers”) and even throughout Christian religious iconography as the depiction of the holy trinity.

Since metaphysical principles tell us that it is easier to let something old go when we are reaching out to embrace something new, I decided to ground our inquiry process with an archetype. I believed that if we wanted to engage in inquiry in a new way, we needed to start at the very beginning with choosing an archetype that provided a counter to the lone male, hierarchical idea of strength so prevalent in our dominant understandings. I decided to share the image of a spiral which I had experienced in the BD101 session as a powerful arrangement. **To me, the spiral was appropriate because it simultaneously pulls into its center at the same time it expands outward.**





My proposed archetype of the spiral was easily accepted by the inquiry group, most likely because many had already been introduced to it through CEIO. It served as a powerful way of beginning our inquiry journey.

To introduce the spiral archetype to the group, I shared an excerpt from the movie: "Inner Worlds/Outer Worlds" (<https://awakentheworld.com/>). I was intrigued by the examination of the spiral as both cultural archetype and scientific imagery. The film described the use of the spiral from ancient times and the ways in which the spiral shows up mathematically in the natural world. This connection was an important one to make in linking the world of social science to the world of nature as our context for learning and growing. The previous images show the spiral as it shows up in the larger universe, in the animal world, in the natural world and then into the human made world of cultural archetype.

After sharing the segment of the video, I asked the group to discuss notions of truth, ideas of how we would engage together, ideas of what our inquiry process might be vis-a-vis the broader world, and to share some thoughts on how story might play into our work. We did this seated and then standing, writing on sticky notes, small group dialogue, and large group sharing. I typed up and shared the notes from the discussion and the group used these in our conversation of methodological intentions – or, how we wanted to be in our inquiry together.



This process was important because it grounded the notions of inquiry in the group's own experiences and beliefs and later, their desired form of knowledge building. It is important to note the ease with which the inquiry group embraced these activities as they mirrored the ways of engagement that they had been supported in through various CEIO activities. It seemed very "natural" for the group to then move from this exploration and articulation into setting shared intentions for our work together.

Too often, research begins in academically based terminology that places philosophical thinking in the hands of an elite group. To demonstrate to the inquiry group that their thinking on questions of knowledge were robust, I shared the notes from their own charts in a format that aligned their notes with academic research terminology that is used to understand and create research methods. (Definitions from various online dictionaries). These included the concepts of ontology, axiology, epistemology and methodology.





## WHAT WE BELIEVE ABOUT REALITY

(**ONTOLOGY** - nature of being, becoming, existence or reality; the branch of metaphysics dealing with the nature of being)

- Will always learn more and expand the truth
- Truth has many sides
- Nature in a matrix
- What is my nature? – trees and flowers—what is my core – trees and flowers, grass = external and that is hard for all to relate
- Future is made entirely of material from the past
- Nature is more intelligent than us (look for defects – no – drives you crazy) – observe patterns in the world – listen to what that is telling us
- How complicated things get when we put matters in our own hands
- Relationship of self – is connected to the rest of the world
- Efficiency and truth – together they don't go well together – truth in a box works – need to be right not always about truth – image and perception not truth

## HOW DO WE GET TO KNOWING

(**EPISTEMOLOGY** - the theory of knowledge, especially with regard to its methods, validity, and scope)

- Intuition, insight, knowingness, the source, core, center
- Accessible language
- Openness, mindfulness, suspended judgment
- What do I feel like when centered / How do I know/ Makes a practice
- Use of self in patterns and mirror – info within us is useful to the work outside
- Fossils = information that causes ripples
- See alternative processes to conventional thinking – fear of something new – testing new processes and ideas
- Being, energy, mindfulness, awareness to the process
- Intuition vs conventional thinking as we interrogate “what is” ..... body is telling you something is wrong
- If one looks outside of self can shake my core – center – how does one know they are centered

## WHAT DO WE VALUE

(**AXIOLOGY** - the study of the nature of value and valuation, and of the kinds of things that are valuable)

- Can we do visioning without an analysis
- Trusting in process (transparency)
- Response what of accessibility
- The natural world was taken from you and you fuckin deserve to have it back
- How to be purposeful and grounded in goals and process/activities
- Mindfulness/ knowingness “this doesn't feel right” – doesn't have integrity
- Name our positions in our inquiring
- External seeker of truth – our responsibility to find our core and our truth
- Us – where we came into the world – pure – with growth – response – natural to follow energy and harmony of world – evolution being impeded by structure – linear truths – what are the things that get us off path

## OUR PROCESS FOR UNDERSTANDING

(**METHODOLOGY** - a body of methods, rules, and postulates employed by a discipline: a particular procedure or set of procedures)

- Process warm not critical
- How we use language (connect to lived reality, power, awareness)
- Engaged in work of shifting power – root level work
- Look for deeper patterns to see where the deeper ripples are – ripple/trigger may be seen as negative – instead look at it as information in the quest for truth
- Not strive for unity. Inclusive. Differing perspectives within group and outside
- Nature, symmetry/order, reflective, center, math- facts, perceptions, direct experience – look for deeper patterns.
- Not designed, something new – interpret “what is” – a map is not a road
- Establish collective understanding in this space – challenge we all have our own disruptions
- Nature as first teacher – only teacher – on land, disconnect – generational – we are nature – are we our own teachers
- Being open to an expanding sense of truth

## OUR TOOLS AND ACTIONS

(**Methods** : a systematic procedure, technique, or mode of inquiry employed by or proper to a particular discipline or art)

- Visual maps
- Examples of patterns
- Identify/name dominant narratives and look for alternatives
- Everything is a process – a conclusion is not final...
- Small to large, spiral, patterns, symbolism, deeper truth, depth
- When do we reflect/mirror something else

## BOUNDING THE INQUIRY

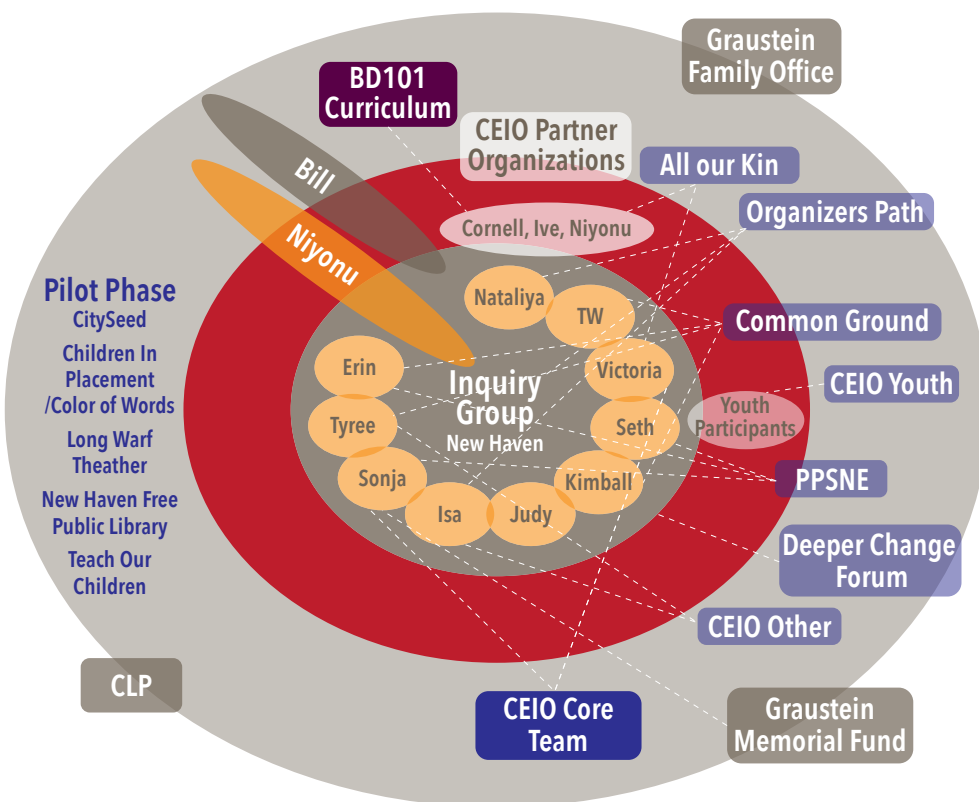
To further establish a framing for the truthfulness of our shared inquiry, it was important to connect the inquiry process to how the inquiry participants were drawing from CEIO as the context for the inquiry.

To round out an inquiry approach that would meet the purpose of the inquiry and also show up as credible in research circles, it was important to link the questions, standards, and data to a bounding. Bounding is about setting parameters for what is in and what is out. For knowledge work, bounding refers to how the inquiry is structured. It includes decisions about what is appropriate to include and what is outside of the scope of any individual research project. There are multiple ways to bound a study. One is to delineate a case in time and place, whose description can illuminate a concept or occurrence. Another is to bound by characteristic, focusing on a group of individuals who share a characteristic or a belief or a role.

For this inquiry, we bound the dataset through the group's individual experiences in relation to CEIO. We make no assertions that the understandings surfaced

apply to a different dataset or would have surfaced in the same ways in another group of people. That said, it is the sense of the group that the concepts surfaced would receive a knowing nod from folks in change work in other settings and configurations. To support transparency around the group's bounding, the following chart provides indication of the group members and their various circles of affiliation in relation to CEIO and its context.

The graphic shows how the individuals in the inquiry group lived and/or worked in New Haven. It shows how the group members were connected to partner community organizations active in the second phase of the CEIO development and the list of organizations that took part in the pilot phase of CEIO. The graphic also includes the various elements of the CEIO engagement in the broader community such as the Organizer's Path, Deeper Change Forums, and the Youth Program. Finally the outer circles show the context of the broader Graustein funding and program delivery. Overall the graphic is intended to focus on the individuals engaged in the inquiry work and to show how their experience is grounded in the concentric circles of CEIO engagement.



With this sense of the group as a space for analysis, the work of the inquiry became central as an honoring of CEIO's definition of justice and ways of being.



BD101, March 2016 - A rare offering made up of CEO only participants (from Partner Orgs. and the full Organizer's Path, Cohort 1)

## BD101 AS THE PRIMARY CURRICULUM

Beyond Diversity 101 was created to change a pattern that Niyonu noticed in many years of diversity work. She shares:

*I was beginning to see a disturbing pattern in myself and in my fellow trainers. When we facilitators measured "success" during and after a workshop, it was frequently by a yardstick which correlated to the following: on one side, how guilty had the white folks—especially white men—been made to feel; and on the other side, had the people of color, women or some other designated oppressed group gotten sufficiently in touch with their pain and expressions of anger?*

*I began to notice that many activities in our workshops were either geared to encourage oppressed groups to tell their story of victimization or to bring oppressor groups to the brink of tears and shame. I began to ask the question, "Is there anything beyond this cycle?" (<https://www.bd101.org/history-philosophy>).*

BD101 workshops provide a combination of experiences through both guided activity and informal exchange that occurs between activities. There is a balance of analytics that focus attention on the categorizing, pulling apart, and seeing part in relation to whole, and the connection to experiencing wholeness. In BD101 the analytic and the experiential are never disconnected. Both are part of being whole.

I liken it, in an architectural design sense, to the existence of concrete form and open space and the movement that occurs between them, even though attention may be directed to one or the other as needed. This focused connection shows up in activities of honoring self and others. It is present in "affinity groups," where those sharing like identities can come together in healing without the censoring or othering that occurs in mixed groups. Opportunities for being are present in nourishing food, dance, and music. When I come into my body, I remember my own BD101 experience as a time of breathing freely - inhaling and exhaling are both given space, respect, and attention. I won't try to describe any further a BD101 experience as I would not capture it in any way worthy. It truly needs to be experienced.

Frameworks are important to understanding the relationship of BD101, as a curriculum, to the notion of social movement. Social movements require new ways of being to spread and create change. Some say that they are about "building the muscle" for change. The BD101 analytic activity, experienced in supportive learning space (either through workshops or through on-site training) where participants can engage their self and each other in a mind-body-spirit way, is what I pose is the primary curriculum of CEO.

The connection of CEO to the BD101 curriculum and experience became apparent to me, both in my attendance at BD101 and in the beginning of my engagement with the group of participants who formed



the shared inquiry group. I asked them to simply share what came up for them when they thought about CEIO.

They generated the following list (the categorizations here are mine).

## THE DREAM

**Racial Justice; Social Justice; Equity; Transformation; Healing; Liberation; Conscious co-creation;**

## What does it take

Heartwork; Body Awareness; Self-awareness; Conscious use of power; Power with; Knowingness; Impact; Expanding circles of engagement; Capacity building; Outcomes; Network (working in different parts of the system of greater New Haven, but then expanding to Bridgeport, etc.); Effectiveness and inclusiveness (one leads to the other and the other requires the first); Privately funded (redistribution of resources through philanthropy); Exciting the system; Consciousness shift; Disruption of status quo; Intention and choice – choice-fullness; Interdependence; (Beyond) Diversity; Coalition of unlikely partners – creating coalitions of other unlikely partners; Alignment; Transparency;

## Structure

Multiple component parts (e.g. deeper change) catching people in different ways; Organizer's Path; Workshops; Deeper Change; Tools/Practice/Frames; Following the yes (goes beyond requirements – more about motivation and showing up – invitation to the table); Spacious use/approach to time; Community – communities;

## Frames

The Flower – core beliefs/how we say we be/working at the roots; Mindsets (how we relate to having power); 360 Truth telling; 3 Circles; Window shades; Leadership wheel of life; Chakras;

## Areas for Analysis/Action

Patterns of Diversity; Implicit Bias; Polarities; Organizing; Workplan; Action Teams; Systems of oppression; Resistance to change; Who/how we be; Shared Language; Role of expertise – who gets engaged; Decision-making; Community Building; Implementation strategies; Roles of social change;

## Practices

Heart listening; Self-Care; Recognition; 360 self and peer review; Holding and reflecting back; N&S (notice and support) groups; Speaker, holder, listener; Coaching; Facilitation tools; Tracking; Holding Space

The list generated served as a backdrop rather than the coding structure that I had expected. Observing this group starting to articulate an experience of a very deeply structured approach to social change confirmed for me that there was an emerging shared practice. This brainstorm discussion helped me recognize that we needed to delve more deeply into dialogue as our meaning-making process, with our understandings grounded in a deeper sense of lived experience, to even come close to illuminating CEIO work.

As I continued to interact with CEIO offerings and activities, it appeared that CEIO offers a unique real-time engagement and opportunity to understand liberation through one “curriculum-in-place” and to surface how isms and inequities reveal themselves throughout a change effort. A curriculum in place approach opens up the possibility of surfacing: where the concepts and practices of change bump up against the structures of inequity; where various approaches targeted at a single ism intersect or clash with each other; where aspects of identities become intersectional through lived experience and action; how those who embrace social justice – change workers within our organizations and communities – understand their own lived experience.

# MEANING MAKING WITH THE INQUIRY GROUP

Effectiveness, as both a concept and a goal, was woven into the discussions of what the inquiry process would explore. I increasingly believed that the inquiry itself should become part of achieving effectiveness. Method integrity would be determined by how much the inquiry itself embraced CEO ways of being. Given the desired alignment and the question of how does CEO show up in the world, our focus for inquiry became to:

- illuminate the values and processes of CEO engagement,
- surface how our values and actions manifest in the world, and
- build knowledge that embodies our commitment to conscious co-creation

However, aligning a methodology to CEO required adhering to two core concepts – CEO’s focus on “ways of being” and CEO’s belief that equity is inextricably linked to lived experience. The methodology thus became grounded in focusing not on the “doing of the thing, but rather on being as *the thing*.”

To engage in this way, we needed to re-frame some traditional research concepts that are grounded in the natural sciences and the observation of the world outside of oneself. To be in alignment with the social and co-creative sense of CEO required an interpretive research approach that honors human agency in knowledge construction itself.

It is critical to distinguish between learning and knowledge. Learning is a process that is quite natural to humans as individuals. However, knowledge construction is inherently social and occurs in public space. In this public space, there are many archetypes, or images and stories, that inform our understanding of what happens in both our inner realities and the world around us. Embedded within our learning, knowledge and archetypes are also assumptions – conscious or unconscious – about what truth is and how we get to truth. Co-creation in the context of the CEO inquiry work involved building a shared consciousness around these key concepts.

The shared inquiry process, as it evolved, incorporated the following aspects, not as phases, but really throughout the entire process:

- demystifying knowledge;
- honoring lived experience;
- bounding a dataset as a case;
- questioning through dialogue; and
- understanding our process as a hologram where every part contains the reality of the whole.

As we worked together through these concepts, the group stated their desires for how we wanted to construct knowledge together. The following text was agreed upon as both an internal guide and a public introduction to the work of the inquiry group.

Shared as a memo with the CEO Core Team and with Organizational Partners, these intentions served as a grounding for the group. Our interactions as a group and my facilitation were both held to these intentions. It provided an internal anchor of sorts at times when I felt that my facilitation needed to change course or that traditional analytic power structures that privilege the “researcher” needed to be re-examined or shifted.

The CEO inquiry group is exploring how CEO work shows up in the world. We are using an engaged and systematic inquiry process. We have set intentions for our inquiry to guide our questioning, how we collect information, who we go to for information, what we consider data and how we approach analysis and meaning-making. We will share our emerging understandings with the wider CEO community (and beyond) through written words, actions, decisions, and our ways of being.

We acknowledge that our choices in methodology can reflect, perpetuate, or resist and shift current power dynamics. While we realize that we can develop understanding by passively collecting and analyzing, we also believe, and commit, to engaging in the work of shifting power through our inquiry.

We share the following intentions of this inquiry. Holding each other to these is how we claim that our inquiry is trustworthy and credible. We invite our partners to engage with and hold us accountable to these intentions as well.

## THE INQUIRY GROUP INTENTIONS

*Taking steps back, slowing down, and being in a new relation to these ideas (data, inquiry, analysis) even when we have reactions to the language and what has been done in the name of research. Staying in when it is uncomfortable.*

*Stating our own reactions and our own core/root beliefs is part of the analysis process.*

*Our physical selves are a connection to the world. We engage through our bodies and listen to our bodies in the analysis even if words do not come initially or at all.*

*Accepting the wholeness of how people share information and not separating out what initially seems important to us. We embrace the lived experience of people and how they express that experience.*

*Sharing information from the past, developing a shared language and describing terminology are all crucial to our process.*

*Openness to the totality is what brings deeper understanding. Seeing the complexity and the wholeness even when it is overwhelming. Our minds have a tendency to break things apart and put them into categories. We often rush to identify what is useful and throw away the rest. We recognize this tendency and want to practice keeping all of it in for longer as we make meaning together.*

*The inquiry group brings multiple perspectives. We share these perspectives in our meaning-making. Engaging in a practice of connection, we stretch ourselves toward deeper understandings by identifying patterns and being, while staying open to an expanding sense of truth.*



Photo credit: Maza Rey, Dream & Activation Deeper Change Forum, September 26, 2019



## INTERPRETIVE ANALYSIS

The intentions were especially important because of the emphasis on the lived experience of participants in the group and the use of interpretive analysis to illuminate this lived experience. Surfacing this lived experience as the basis for analysis meant bounding a CEIO case with the group at the center. It also involved understanding data, not as information coming to us from the outside world, but data-making as an active process -- a way to ground our analysis in group member experience. By surfacing artifacts and events from group member experiences in change processes, we were able to create a database for our discussion and analysis. Our work became a process of observation, reflection, and discerning together in dialogue.

The final analytic layer of the shared inquiry process was then to identify the concepts that were most relevant to the intentions of transformation. While “themes” are often presented by researchers as the important ideas of what has happened in the world, change constructs are a bit different. A change construct is defined as a “cluster of ideas that coalesce around a concept and occur in various configurations over time” (Frusciante, 2005). **In other words, change constructs are those occurrences that we notice happening over time that we believe need to be examined during transformational change processes.**

Change constructs are not indicative of *what is*; they involve naming understandings as they develop over time and across context. They are in service to *what could be*. In this group approach, the value judgment of naming constructs was grounded in the experiences of the change practitioners as they reflected on CEIO and their efforts to move toward greater equity in one urban community. Our group’s interpretive analysis thus centered on developing “change constructs” as concepts that the group believed needed to be unpacked to support change processes.

Interpretive analysis that is grounded in an idea of change constructs helps in “making CEIO visible” by surfacing lived experience as a way of illuminating change processes. The crucial notion is that when CEIO emphasizes the deepest levels of change in “being,” stuff happens. CEIO encourages individuals, organizations and communities to acknowledge power dynamics

and speak bravely and truthfully. CEIO provides tools and supports for shared restructuring that can lead to greater equity. CEIO action is always coming together, going deeper, and mirroring back.

The following constructs are not how CEIO staff address issues, or what they do. Making visible here is about what happens when people, groups, and organizations are invited into new ways of being. That shifting opens up a space for exploration. The change constructs help us to both share what the inquiry group members have experienced and to do this in a way that illuminates the occurrence of change and strives to grasp the essences of change processes.

Coming to an essence is crucial in this work. It is not consensus or even an agreement that everyone has experienced something in the same way. When I say “getting to an essence” I am referring to that time in a group where it feels as if everyone has been focusing and is intently anticipating something. It’s like walking on a path through some trees or through a city street, with your head down, watching each step so you don’t trip on a stone or crack in the sidewalk. Then, you reach a point where you pause and lift up your head and see an amazing vista – a scene, an historic building, a sunset – and what you have been walking toward, what you have been trying to “get to” suddenly, with a huge inhale and then peaceful exhale, captures you. The awareness of what is in front of you becomes part of you, sometimes gently and sometimes in an overwhelming way. That’s what “getting to an essence” is.

Once we began to explore this notion of change constructs, the inquiry group used the data each member had contributed and discussed patterns and linkages across their data. We often had the physical “data sheets” in front of us so that we could see write-ups, move them, categorize, and re-categorize them. The visuals also prompted participants to point to and explain the connections they were noticing with the data of others. The change constructs emerged in these data discussions. We engaged each construct and worked and reworked them, continually calling each other deeper into our understandings and moving us all to first, a shared essence, and then a sense of shared meaning, the results of which are discussed in the next section.



# CHANGE CONSTRUCTS

In this section, I share the constructs that the group agreed were most important to document. For each, I provide a brief statement similar to how I offered my noticing to the inquiry group. These were ideas and categories that I heard emerging from our discussion of artifacts and events.

Each construct has been given a name that the group decided upon for each set of ideas. I share a participant quote that seemed to illuminate the construct. Beyond that, for each construct, I tell of the group sharing with participant quotes that can help deepen our understanding of the construct.

In each construct description, I offer some specific ways that each of the constructs showed up. These examples are meant to bring the constructs into our mind's eye and body in ways that we can connect to our own experiences. It is important to treat these as snippets from experiences and not about any specific organization or person. The group did not collect direct observational data. However, each occurrence actually happened at some point, witnessed by someone in the group, and in some location related to CEO.

Sharing the change constructs that emerged poses a few challenges. The constructs as written risk becoming stagnant and removed from the dynamism and energy that marked the group's discussion. The construct descriptions are often necessarily vague.

For purposes of confidentiality for both members of the group and for others involved in the artifacts and events that we tapped into as data, it was important to omit names and to refrain from sharing in ways that would easily identify specific people or organizations.

At the same time, being vague in the identifiers does align with the purpose of the inquiry. As the group sought to bring their experiences together for shared meaning, we were seeking patterns, linkages, and connections across individual experience. Any of the occurrences shared could have surfaced from, and most often did happen, in multiple places at different times and involving various people. In our discussions, when these occurrences came up, members often had a shared sense of "yes, I have been there, seen that, felt that too."

The quotes or incidents in this report may seem similar to ones you have experienced but the insights are not solely about your specific group or organization. If the research process has worked well, at least some of the examples will seem familiar to the reader, not because it was written about you specifically, but rather because it is a pattern that hits close to home and thus seems familiar in your mind and body. If any example has hit too close to home, I acknowledge that the meaning shared here is totally my responsibility and open to other interpretations beyond what is shared in this report.

## RESISTANCE

### Angela's noticing:

*In our discussions, there was something about sensing when things were getting stopped, stalled, blocked or delayed. Sometimes this was noted as active, sometimes as passive or unconscious. Interestingly, it was sometimes referred to as a negative force against change or an aspect of protecting the status quo. At other times, it was embraced as a force blocking or pushing back on the status quo in an effort toward greater equity.*

### Illuminating inquiry member quote:

**"If there's no resistance, how do you move.... [when] that resistance was lost, people didn't have a honing mechanism for what they were trying to do." TW**

Inquiry group members used the word resistance often as positive action against an inequitable structure or idea. Sometimes resistance was the goal itself, as the work was figuring out "how to resist systems of oppression." They talked about various ways that resistance showed up. Resistance was understood as positive and unifying, as in solidarity and being part of "THE resistance." This occurred when a group rallied or embraced their collective power to say "no" to oppressive conditions. However, the group also talked about resistance in a negative sense as "resistance to change or resistance that protects the status quo" or the existing inequity.

Continuing with the notion of resistance, the group opened up the concept and moved from the binary positive or negative to more nuanced understanding of those times when things seemed stopped or stalled. In perhaps its subtlest form, it can simply be a pause or what Erin talks about as a "pre-contemplation" phase – the time before individuals or groups even recognize that things need to change.

Resistance can show up in examples where individuals were adhering rigidly and unquestioningly to roles that served

to restrict decision-making and authority to homogeneous groups of people. For example, this can be observed when only a certain group – often delineated by a formal level of authority – are included in strategic planning. It can be observed when adhering to this role delineation means that only white people, or only men, or only people with a certain education level or pay scale, have a voice in strategic planning.

Resistance is also occurring when unofficial boundaries or even official ones were used as the rationale for keeping people separated into silos. The separation inevitably reduced informal communication, often impeded transparency about decision-making, and created a barrier to shared problem-solving and creativity. One example of this that showed up for the group is very common in nonprofit organizations where there are accepted norms about the need to keep board members separate from staff and from community members. This often shows up as the articulation of "governance" responsibilities and "operational or management" responsibilities.

In the traditional leadership textbooks, separation between governance and operations is presented as a gold standard. Although this is common practice, this intentional separation can also serve to limit deep understandings of the ways in which governance decisions manifest in the communities served.

Another way resistance can take on a conscious and active form is when an individual identifies an existing way of being and calls people toward a different, often more engaged way of being. Seth shared a story of an event where he called coworkers into a new way of being in community. He noted the tendency for staff to work their shift and go home to another community. He asked folks to participate in a local AIDS Walk as a way of standing in solidarity with those affected, and to spend time in that community outside of their routine duties, so they could be present for the actual population that the organization served. He was pleasantly surprised that his act of disrupting an existing pattern led to new experiences.

The inquiry group discussed how people tend to want to be comfortable, especially in work settings. There is an emphasis on competence which often gets equated to doing the same thing over and over skillfully, and being right and graceful in the execution. In change processes, predictability and comfort are often not what is experienced.



Judy shared her experience at a Community of Practice (COP) meeting. The COP is a broader group space that CEIO created so that there could be cross-organization learning and support. At this particular COP, Judy noticed the very different reactions of groups in the room as they were encouraged to share how their change processes were going. Initially there were some complaints toward CEIO about how the process was going. As is customary in CEIO, the facilitator's response was to remind the groups that they too were contributing to the process and had the power to influence that process. When presented with a reflective question to discuss, one group seemed to have a very dispassionate conversation that ended promptly at the finishing time. Another group seemed to have an intense conversation that ended with a physical gesture of holding hands. Yet another group seemed to have a meltdown with people storming off.

What the inquiry group noticed about this event was the various ways in which people and groups encounter a change process and how they may react to times when there is no "tidy ending." Feelings like confusion, disorientation, frustration, irritation, can manifest as walking away.

The group even described times when these feelings, that appeared as resistance, could lead to movement.

### **As Seth expressed:**

*There is a moment when niceties disappeared, conflict ensued, and we had to regroup and there was pretty much an understanding that there was a deeper truth, core belief...I felt like we're skirting around the real issues and not really getting at the depth of what the problem was. And that was the tipping point. That resistance was necessary to get deeper.*

The inquiry group members also spoke of ways that they themselves used their own voice in these situations – writing a letter to coworkers about the importance of the work, speaking in a meeting, and inviting others into new behaviors.

The inquiry group pondered the times when resistance showed up in CEIO and its practices. Sometimes they experienced it as a resistance to having a black woman in a position of authority. Sometimes it was

a resistance to facing how underlying racism was preventing a group from seeing the contributions of a person of color in the group. On one occasion, where a group directly resisted CEIO's approach to professional development, Niyonu met the resistance with an acknowledgment that responsibility for the training could shift to the group itself. Throughout the inquiry discussion, the inquiry members shared various times when resistance showed up in reaction to CEIO's presence and focus on inclusion and change. Some noted how often a white professional man or woman was accepted as more credible or accepted than when the CEIO facilitators who are people of color were leading the conversation.

### **As one inquiry group member shared:**

*It was a moment of intensity, with speakers in the room feeling generally like we hadn't moved the organization closer to consideration of how to become an organization genuinely engaged in day-to-day work with how to resist systems of oppression.*

*I felt cold and a pit in my stomach felt like it filled with lead, like I wasn't going to be able to move from my chair. It was a mixture of fear and anger. It felt like everyone was missing the point, and that we had just severed a limb.*

*I wondered how to respond, how to refocus, I was feeling that the resistance from staff might have been more connected to the fact that we were aiming at the right thing as opposed to the wrong thing, and yet the group didn't seem prepared to consider how to lean into what we had already accomplished. (Kimball)*

Moving to a sense of shared ownership of the change process is important to CEIO's approach. One aspect of CEIO's approach with organizational partners was to encourage the formation of a structure across the organizational system that would counter the tendencies toward job-specific silos, strictly hierarchical decision-making, and this sense of CEIO as the outside authority.

These Core Partnership Teams (CPTs) included organizational members from across functional spaces and with varying levels of authority and decision-making. CPT Action Teams were created to specifically name and propose strategies as they noticed ways in which organizational patterns were resisting inclusion. In one example, a job description was even created that included a continued “agitator” responsibility as an essential function inside the organization.

Whether the energy of resistance was focused on the way things have been done or a path to the way things could be done, it made me wonder about the facets of humanness that lead to resistance. Is there something about how our brains categorize to make sense of complexity that leads to a desire for the comfortable, routine, and predictable? Do we resist in order to protect power, protect from feelings of loss, protect from the unfamiliar? Are we just so fearful of our skills not being able to function appropriately in a newness?

### **Judy refers to Niyonu’s definition of resistance\* as “bound energy,” and further notes:**

*As I read through this document and the comments, something came up for me around the connection between resistance and loss - I saw resistance as standing up for something important (activists and organizers RESIST injustice) and loss as LETTING GO - a process necessary for renewal. All in the context of disruption for the sake of healing - to make whole.*

\* In the 1980’s, Niyonu learned this from Dr. Darya who defined resistance as “bound energy”

### **Victoria contributes:**

*Something that I remember learning about is the role of resistance as an expression of energy. When resistance shows up it can be seen as a sign of effective intervention in the system. The process of conscious co-creation is of uncovering how this energy/power is used. Resistance is an opportunity for uncovering power, freeing it to be used for transformation. So maybe resistance is a strategy, and the change construct here is about exciting the system. Can we see resistance as part of that process?*

## **CEIO addressed resistance as energy waiting to be consciously directed.**

### **As Seth shared:**

*In my experience, the CEIO work calls forth resistance in a very strategic way. It is a gradual process that when people see that their practices within an organization are seen as [stalling] progress, then backpedaling ensues. The response after this resembles “that’s just the way things are.” For some, past pain is present pain. For greater humanity to be a goal, we must first agree that we are all equally human.*

It seems to me that whether resistance shows up as holding on to existing ways of being, or stepping out of these ways to achieve change, there can be very deep fear involved – as deep as at the level of one’s sense of identity. Identity is connected to internally or externally derived notions of purpose, value, and group belonging. This connects to one’s roles in life, in family, in work, and in society. The inquiry group discussed how easily and often a sense of identity can become connected to work functions, responsibilities, and accepted ways of being. The ways in which these show up in work roles in community-serving organizations is important to identify especially because community-serving organizations are often positioned as a bridge between formalized structures of resources and the informal spaces of community.

## ROLES

### Angela's noticing:

*There was something about who people believe they are to be in various contexts. We sometimes note this as identity but here we are talking about how identity is implicated alongside notions of responsibility, authority, and position. We came to use the term roles to encompass identities as they show up in structures, particularly structures that formalize decision making. There was something that came up about roles when they become entrenched in relation to decision-making, authority, and positional power.*

### Illuminating inquiry member quote:

**"I see a web with roles in the middle and all the different ways that we talk about it and things it could mean - with just words and phrases - that would be a really useful visual to see the variety that centers around roles."**  
**Nataliya**

The inquiry group noted many roles that were observed across CEIO partnerships and programs. Some examples are: teacher, organizer, manager, clinical staff, capacity builder, trainer, director, founder, parent, neighbor, citizen, community resident, and many more.

In our inquiry conversations, the notion of roles came up repeatedly. The group noted that one key way that a resistance to change manifests is as an adherence to existing norms around roles within organizations. This can mean hierarchies where decisions are made at the "top" with minimal input from the experience and skills of the broader organization. Even when current structures are acknowledged or named as privileging the few over the many, and usually perpetuating middle- and upper-class white male privilege, the adherence to rigid roles is often used to legitimize the patterns even if they perpetuate inequities.

The CEIO process included creating spaces where there could be greater input across the hierarchies of an organization and greater inclusion of staff beyond senior leadership in decision-making. One way this was encouraged was with the creation of a CPT. CEIO, through conversations and trainings, encouraged groups to examine and make visible the ways in which inequity was playing out through existing organizational silos and standard processes that would have gone unquestioned.

One example was hiring processes where the majority of tasks might reside in one individual, or a standard process repeated over and over without question. Group members commented on the CEIO work and how they came to question the processes for hiring. For example, it was recognized that when hiring was housed in a single role or department with the total responsibility for advertising, screening, and interviewing, inclusion was much more challenging. One person, often over-extended, could not possibly be expected to have all the perspectives or bandwidth that is needed to identify the best match. Reliance on past processes was actually limiting an organizations' ability to see and attract diverse talent that existed outside of existing circles or reach.

Multiple organizations came to see their processes as working against the goals of inclusion. As inquiry group members described the change process, they talked about how expanding the pool of candidates first required expanding the perspectives of those involved in the internal process. Sometimes this re-design involved a committee approach. In another case, a hiring rubric and screening protocol was developed which made it possible for multiple people to take on interacting with potential candidates, but to do so from a shared framework. In all examples, there was an awareness that "fit" for a position in a community-serving organization would include technical skills and also alignment with organizational culture and mission - areas much more difficult to account for on paper alone.

Another recognition in the group was the importance of crafting job descriptions with a transparency about the organization's change desires.



### **As one inquiry member shared from a public position description:**

*[Our school] has a commitment to examining the intersection of social, environmental, and food justice issues; how systems of oppression, including white privilege, impact the organization's work; and how resistance to those systems can offer windows into a more sustainable society. (Kimball)*

The hiring of a diversity coordinator, the explicit naming and hiring of a youth organizer, and the explicit stating of an organization's justice work, were ways that change was explicitly incorporated into an organization's shift toward greater inclusion and impact.

In addition to hiring processes, one inquiry member provided an example where existing "role" focused groups inside an organization were effectively engaged as a way of broadening whose voices were being heard in decision-making.

*This event was the time we organized (with a week's notice) to do focus groups with [our school's] young folks. It happened with a lot of organizing on our parts, a lot of quick action on the part of Niyonu and the other folks who facilitated.*

*I wish I could remember who that was.*

*This was different from the time we administered the [student] survey... So many students stayed, and the data that came out of that experience was deep. That was one time that we centered the student voices in the CEIO process and didn't get stuck in where the adults were.*

*It was a lot of work but it felt really good. It felt like finally we were doing something that captured the information and centered the people that our work needed to center. Not distracted by all the needs and confusion of the adults. (TW)*

Even when there are visible examples of success, and when current processes are acknowledged as inequitable and less inclusionary, there is a tendency for groups to revert to former patterns and role stratification. For example, inquiry members noted when opportunities were available for CEIO training, there might be one conversation happening amongst staff and another happening in management circles without explicit or formal ways of connecting these. As a person who moved across her organization, Erin named multiple times where she noticed different conversations happening in separate spaces even though the conversations could have impact on the same issues.

One example where this happened was in grant processes, particularly those that brought in a new model or approach to the organization's work. Inquiry members shared their experiences in various roles such as service staff, development, and management, and discussed the multiple forces influencing grant writing. They discussed the need for funds, the time constraints and pressing deadlines, and the ideas about who was officially responsible for writing a grant. We all also acknowledged how these very real, very legitimate pressures could result in exclusion, as in the people doing the work would be uninformed about how the work was to be implemented.

When roles are reduced to technical functional categories, it is perhaps easier to justify separation of labor that places decision-making only in certain positions. This also reduces individuals to a singularity when in reality people live through multiple roles. Tyree shared her reflective process when she felt that this recognition of people in multiple roles, and beyond just the technical labor, really helped to deepen the shared work.

It was at a school meeting that Tyree recognized her own multiple roles as part of the CEIO team, as a parent leader, as a member of the CPT, and as a mother of a child who attended the school. Tyree's example reminds us that the roles that we carry outside of paid labor are often quite different than those that we carry out in the organizations. Opening decisions up to the broadest and also most relevant experience can mean structuring in ways that people can bring themselves with their whole experiences rather than just a skill set to the work.



Photo credit: Arvia Walker, Deeper Change Forum, Ricardo Levins Morales: "It Is Our Duty To Win!" Making Change That Matters, April 6, 2017

### **Tyree shared how different it was when there was a space created for sharing stories.**

*The smell of freshly brewed coffee filled the air in the cafeteria where the meeting was held. The room was filled with staff, faculty, parents, and students. It was bright and energetic, filled with staff, faculty, parents, and students laughing, crying, and even making jokes. We sat in small groups very closely and shared our stories one after the other.*

*I think that this event really helped to bring our humanity in the room. The sharing of story made us focus less on roles and positions but more on the person/people in the room. It to me was less about differences and more about commonalities and shared experiences.*

*In my opinion this for me represented the shift in CG pattern in the way we have open, honest, and difficult conversations. People actually leaned in and spoke how they really felt without the guards or censors. It was the first time I actually experienced connection within this community and truly felt a part of it. This also was the very first time that I did not feel like an outsider. We were getting to know each other by actually sharing our stories that allowed us to see each other in a way that we never have before. What a great experience and it was actually fun!*

The experiences shared by the inquiry group also included instances of individuals standing firmly in their positional role as a way to leverage change. Multiple people conveyed stories when they themselves as directors and other directors of organizations publicly stated their commitment to equity and discussed publicly the processes that the organization was undertaking to move toward greater inclusion. Kimball described the public sharing of equity work as an embrace of vulnerability and a conscious use of power in “owning” the work.

Seth pointed to a director’s statement as part of transparency and explained how sharing details about process helped to make a shift from an organization where staff often “felt decisions were happening to them,” to a place where people had a clearer understanding of how decisions were being made even if they themselves weren’t always in the room.

Not surprisingly, these shifts and transparency could also be met with tension. The inquiry group shared a sense that shifting of perceived roles also led some individuals or groups to more strongly hold on to existing power structures. Inquiry members referred to this as “entrenchment” and examined the possible reasons for this occurring.

The group discussed the fear associated with disentangling one’s positional authority from one’s identity. Erin noted that feelings of fear and loss of power are grounded in the idea that there is not enough to go around. Sonja suggested that it is actually confrontation and disruption that make roles shift. TW reminded us that particularly in multi-race led processes, there are questions of safety and pain. Nataliya clarified that when roles are shifting, there can be fear, loss, and holding on to power for some, while at the very same time some in a group are feeling relief and welcoming the shift with a sense of “finally, a shift is happening.”

***There is a tension here between holding the whole and also having clear role differentiation for efficiency, effectiveness, and justice. Some of what comes up in progressive/rad (radical) spaces is a resistance – an energy that seeks to downplay the need for role differentiation. So, moves towards explicit roles, can look like a conservative or guardian of status quo move.***

***In the CEIO work, however, the surfacing of roles given and taken in a domination mindset – is not done in a move to obliterate them. In surfacing what has been happening in embedded structures and roles, the opportunity comes to make choices to shift those roles and respond to what is actually needed in alignment with values and goals. Moves toward role clarity are moves toward greater equity and effectiveness in this work. And in this sense, the whole dynamic of liberatory systems is held alongside the complexity and differentiation in different roles. We all have a role in this work, but it is not the same role. Shifting away from roles that have been given by domination and towards roles of healing and liberation feels deeply needed, and deeply true for when this work is happening. (Victoria)***

It seems to me that whether we accept them consciously and willingly or they are directed toward us by the expectations of others, we all live our lives through a multiple set of roles. Roles are very important to social engagement as we interact in the world through the notions of neighbor, mother, spouse, member of an ethnic community, member of a gender community, worker, professional, and the list continues. However, it is the ways in which our own self-perceptions or identities interact with these roles that results in our behaviors, and shows up in how we carry out responsibilities, obligations, and how we express ourselves.

Roles, at their core, are social constructions that enable us to have a sense of what to do in the world and how we contribute to society in meaningful, productive, “socially acceptable” ways. Just as roles operate through and across settings, they are closely connected and supported and sustained through structuring and have a lot to do with how power operates in groups and organizations. The inquiry group conversations pointed to types of structuring that was revealed during the CEIO work.



## STRUCTURING WITH AN EMPHASIS ON CODIFICATION

### Angela's noticing:

*Something about how new practices or behaviors become structured or part of the culture, such as language, and how these new structures succeed or get co-opted. There was something specifically important about the way things get written down as policies, procedures, rules, regulations, guidelines.*

### Illuminating inquiry member quote:

**"Is the difference [that] codification is a specific process [and] structure is something that guides our decision making... codification can be ossification and not change at all."**  
**Kimball**

For the inquiry group, examples of structuring ranged from the very formal ways that rules, regulations, and policies are documented to the subtler ways that people and groups come to adopt more inclusionary language and processes.

Sonja emphasized the latter where behaviors and practices became part of the operating culture such as when multiple people started to do "heart listening" in their daily work.

Similarly, **Kimball** talked about noticing when he started to hear the language of BD101 being used in groups across the organization.

*I somehow became aware in 2017 that [a colleague] had directly begun addressing issues related to racial diversity and environmental education in her regular staff meetings, by starting with a discussion of some basic CEIO tools. She was relating something about having a guest in to talk about the Three Circles; on a separate occasion the Flower; on a separate occasion the idea of an N&S group for heart listening, and finding the conversation that resulted really valuable for her employees, when it occurred to me that this was a major shift for the organization (and for her).*

It was interesting for me to note how frequently BD101 frameworks that had become a very deeply structured aspect of CEIO were brought up as a natural part of the way inquiry group members talked about how they made meaning of their experiences, and in turn, the artifacts and events that they shared.

"Doing the flower," was a term that needed no explanation within the group. "Heart listening," or the "Drawbridge" activity were common reference points. The reference to these specific tools or exercises signaled how deeply the frameworks were being used as an analytic framework for action, not only by the CEIO Core Team but in the extended circle of people who had been involved in partnership organizations and CEIO programs.

### As in the example provided by Seth:

*The Intentional Hiring and Recruitment Action Team used the flower diagram to analyze the hiring and recruitment process to find ways to make the recruitment and hiring processes more balanced across departments and for each open position throughout the organization. This picture [artifact shared of the flower activity] depicts the collaborative efforts of our cross-departmental team and our CEIO liaison to plot a course toward a more equitable process.*

### He emphasized how the flower process supported the team in asking questions:

*This tool helps a group get to the root of our core values. Many of these values are steeped in white supremacist culture and require a very deep dive into the reasons for certain practices being commonplace [in the organization].*

Sonja also referred to the language of "holding" – as in holding space – another term that the group used often and which was thought to be gradually adopted in the language of CEIO participants. Sonja reminded us that structuring happened in different ways, including the more formal and also the cultural.

**As TW reinforced:**

*Victoria and others were also mentioning “internalization” as a process of codification and I don’t want to lose that here. Also, culture-making... like at times at CG we talked about “creating a culture of anti-oppression” and I would add now, liberation: is this culture-making process one that maybe belongs in this section? I think the culture-making piece is so important, because with it, people have new patterns and routines and ways of being that can replace the old ones, and with the new patterns... a sense of belonging! And that is so important in change-making work.*

CEIO as an approach to organizational change attempted to create structures that would engage people from various roles and formal authority in ways that sought to break down hierarchical patterns of decision-making. As noted above,

creating a CPT made up of individuals from various roles and relations to formal authority in the organization was one step in encouraging multi-functional planning and action teams. Providing these teams the opportunity to develop proposals for how funds were distributed and utilized was another mechanism for engaging staff in new and more inclusive ways, even in the processes for accessing and directing resources.

**Judy** shared a document that she remembers receiving when she first began work as a project manager with CEIO.

*The document is addressed to the Core Partnership Teams of our partner organizations as they entered Phase II of the partnership in early 2016. It reflects back on key components of the CPT’s work to date and anticipates the multi-year process ahead as the CPT creates a work plan, holds the vision, moves the work out into the organization (and meets resistance along the way).*

CEIO Core Partnership Team (CPT) members are the internal holders of the CEIO partnership. The CPT members work closely with the CEIO Capacity Building & Training Partners (CBTPs) to provide oversight for the Partnership, which is guided by the Partnership Vision and the Partnership Work Plan. During the Early Phase of the Partnership, the first 6 – 9 months, the CPT works to build a solid team. Care is given to knowing each other, to understanding the organizational culture, and to developing a shared vision for the Partnership and the work that will take place throughout the organization.

There are five primary components of the CPT’s work during the Early Phase:

- 1) Team and relationship-building.
- 2) Grounding the work in a shared vision & purpose.
- 3) Defining terms and increasing understanding of key concepts and frameworks.
  - a. Three Circles (Individual, Group & Society);
  - b. Build shared definitions of key terms: inclusion, justice, co-creation, systemic racism, etc.;
  - c. Build capacity for recognizing and holding the space to develop and sustain a truly inclusive and anti-oppressive organization.
- 4) Developing and administering a Baseline Assessment customized specifically for the organization.
- 5) Developing the Partnership Work Plan, Scope and Timeline using, in part, the results of the Baseline Assessment. The Work Plan will map out priority areas for a multi-year process. Once the Work Plan has been outlined, the CPT continues to serve in an absolutely critical function. The team building, grounding, visioning, and training for the CPT will continue and now expand more fully throughout the organization.

An indicator of success will be that more and more members of the organizational community (staff, board, volunteers, etc.) take greater ownership of the work.

As the Work Plan is developed and implemented, the CPT needs to be even stronger in its ability to articulate a clear vision as members of the organization will naturally have points of resistance and confusion. CPT members remain primary holders of the vision and the Capacity Building and Training Partners will continue to rely heavily on the CPT to provide guidance in implementing the Work Plan and serving the overall Partnership effectively.

During Phase II of this Partnership, CPT members should re-commit to:

- Taking a whole-systems perspective
- Participating in the CEIO Community of Practice, Deeper Change Forums and other Capacity-Building Opportunities provided through this Partnership (i.e., BD101, CLP, etc.)
- Continuing to build a strong and forthright relationship with Capacity Building and Training Partners
- Keeping a focus on internal operations and ways of being within oneself and the organization
- Naming inclusion, justice and conscious co-creation in policy development
- Implementing and monitoring these policies and practices to improve inclusion, justice and conscious co-creation within the organization. The Capacity-Building & Training Partners (CBTPs) provide on-going support to each CEIO Partner Organization as they define and implement their CEIO Partnership Work Plan.

**Some text from the document itself was:**

Although claims are often made that social justice equates to lawlessness or anarchy, the above is just one example of how deeply structured the CEIO partnership work is and how re-structuring at a deep level is necessary for greater equity. The inquiry group reflected on the notion of structure in relation to change work and goals.

*It is not clear to me that the seeking is to break down hierarchy. It seems the seeking is to surface the truths of hierarchy, and how hierarchy is impacted by embedded domination mindsets. Is there hierarchy in a co-creative context? Yes. It is bringing how we participate in embedded systems and structures to the surface, our stakes and roles, that is more accurate, I think. And then there is choice - do we stay with this structure? Do we shift? Can we have hierarchy outside of domination? I don't know. Possibly, if there was an opportunity for role flexibility, and commitments to moving through hierarchies, and not getting stuck. (Victoria)*

Although they recognized how behaviors, language, and new relationships to self, to others, and to work could get "internalized" and thus structured through practice without ever formally being written down, there was a strong sense that the writing down of things was particularly important to surface.

The group came to the term codification as an important aspect of structuring that needed to be opened up in change processes. At the same time, the group struggled with stating codification as a change construct because of how often codification seems to be used to reinforce existing patterns of privilege and dominant ideologies.

Even with acknowledgment of the tension, the group named "codification" -or being written - as an important change construct as a way to point to the power of the written word and its place in change process.

**Nataliya shared:**

*I am thinking about how sometimes codification can be such an opening - a position created, a policy that protects, something that holds people accountable - especially if it is enforced, honored, etc. Then there is the flip side of this: the idea that things can be codified as a way to "check the box," to say we did that, we have that policy, but only in name - how it then becomes a tool, not of resistance or movement building, but rather a tool to maintain the status quo."*

Erin noted examples where CEIO practices that had been verbally explained, trained for, and practiced were actually accepted by organizational participants as more credible once they were written down in a binder or shared through a PowerPoint presentation.

Multiple inquiry group members discussed the power of having written action plans and the ways in which writing down intentions and outcomes solidified shared priorities, while at the same time it may not have met every desire.

*I have mixed emotions about the thoroughness of the plan - on the one hand, it demonstrates some great work. But one thing the plan didn't foresee, which causes me to gnash my teeth a lot, is that it jumps forward in a way that doesn't allow for continued heartwork, continued personal growth; and it assumes that we already had the necessary expertise on staff (and those staff had time) to do the things we say should be done. That hasn't played out the way we want it. (Kimball)*

Even after acknowledging the limitations of a written plan, Kimball also saw it as a way of putting "a stake in the ground." He talked about how having a written plan meant that not everything was being continually renegotiated. While the written word could be used to solidify old patterns, it was also very useful in ensuring that work continued beyond any individual. He stated that "having the workplan means that not everything goes away with one person."

Structuring thus emerged for the group as both a construct to be opened and discussed in both its in-practice form and its formal written form. Structuring, and in particular codification was conveyed as a sign of success in the change process.



Our discussion of structuring and codification reminded me of how deeply ingrained the various isms are in our society – racism, sexism, classism – and that these are perpetuated through concepts and behaviors which are labeled “normal.” Even outside of conscious intention, behaviors of dominance or “power over” are so embedded in practices that they continue even when inequity is acknowledged and equity is stated as a desire. These inequitable social structures are then transferred into, and perpetuated through, mechanisms of institutional structuring, such as explicit or implicit policies, practices, and procedures. There seemed to be an underlying belief amongst the inquiry group that if social justice values could be incorporated into the operations and culture of an organization, and into its formal codification, that greater equity would result.

However, the group recognized that codification in the form of policies or job positions could also leave out the really important history of where the organization had been, what had been learned, and the loss and pain experienced along the change process. Amongst the inquiry group, there were multiple people who themselves were no longer formally working within the organizations where they were internal champions for equity. Every person in the inquiry group knew at least one person who also was no longer employed in a partner organization. The group discussed how the codification of change often left out the experiences of loss felt along the way.



## EXPRESSIONS WITH A HIGHLIGHT ON LOSS

### Angela's noticing:

*There was something about the experience of when things are shifting or conditions are changing that needs to be understood.*

### Illuminating inquiry member quote:

**"The same truth that hurts is the one that heals." Tyree**

**"Disruption is powerful and hard to watch sometimes." Erin**

**"I know these people. It hurts." Seth**

The inquiry group realized that, while our tendency was to go to the sadness and loss when talking about change processes, there was something that was simply about expression and how change is embodied. At the same time, the group would not let go of loss as particularly important to explore.

**Tyree shared** her experience in working with an organization in a moment of conflict:

*Sitting across from an individual feeling tension in my body and also feeling anxiety in the room was challenging. I am not one to run from challenges, but I was able to also support and hold the space with compassion, without heat or judgment. I felt a release in my body when conversations shifted from offense to understanding. The room opened up - it didn't seem so small and it felt warm and delightful once we were able to laugh and work together to resolve our differences and find a solution that we all felt really good about.*

*Social justice work is hard but it is necessary even if it means dealing with yourself and exposing some areas you may not like or are aware of within yourself. This work will cost you something...you have to be willing to pay the cost. We can't be cowards or pretend that we don't get caught in the crossfire and we do have to heal ourselves even in those moments we are called to heal others.*

**TW described** a time of tension in an organization around the discussion of race. She noted her experience:

*Smell of the cafeteria, which was mostly the smell of the grease trap and cleaning products. Echoing room. Feel of uncomfortable, pinching cafeteria chairs. Everyone crammed in whispering...This was incredibly anxiety provoking. I played a large role in getting us to this point, in getting Niyonu specifically to be in that room, and I felt upset at how she was being received. It was alarming to see the open and willing hostility of one (but hidden hostility of more) and I felt nervous, shut down.*

**Victoria shared** her experience in a meeting where a partner organization and the CEO team were addressing the dynamics in the partnership itself.

*This was a powerful and almost concussive period of awareness for me. In the middle of this meeting I was sweating, my heart was pounding, I was confronted with the very real reality of white people holding on to power despite the very clear examples of the impacts of this power... I feel like I experienced viscerally in this meeting the clear choice being made to retain power as it is, and continue dynamics of domination where women of color, though empowered through training and business development, are kept out of relationship, authority, and connection to their actual power.*

**Judy shared** her experience during a Deeper Change Forum where Ruby Sales, a civic rights activist and scholar had presented.

*At this Forum with Ruby Sales, the process spilled out beyond the auditorium and I got to witness and hold turbulence and distress....I was covering the registration table after the Forum had started so as to be present to people arriving late. I didn't know what was happening in the auditorium where Ruby Sales was speaking. One or two - then several people - emerged from the auditorium - walking around, on cell phones, taking a breath. I felt something visceral happening in the moment. Spirits were swirling around the people who were moving into the space that I was in. I felt immense energy being released.*

***I knew it was important to hold space for these people and for everyone in the auditorium. I heard later that Ruby was sharing painful stories of racist violence. I saw agitated and upset people. I heard them speaking quietly on their phones and snatches of Ruby Sales talking when the auditorium doors opened. I felt/smelled the cold air from the outside when people opened the front doors to walk outside.***

Like group members who talked about how it felt to speak up in a meeting – the nervousness and shakiness in one’s voice – or like Seth simply stating that the experiences people were sharing just hurt because of his personal relationships to people being mentioned, the inquiry group could point to many experiences where their expressions were of pain and sadness. We together struggled with wanting to document expressions of joy and release but acknowledged it was easier to surface the more contentious feelings.

The group felt strongly that loss was important to highlight. Loss was believed to be very central to why people hold on to existing patterns and ways of being even when there is an intention to change. To categorize loss in a general discussion of expressions or feelings, the group felt might minimize it and maybe even mirror ways that groups avoid the pain in order to feel comfortable.

The group stressed that loss needed to be faced head on in its many forms – loss of power, loss of victimhood, loss of comfort, loss of people from organizations and more.

***Loss feels like an important construct to lift up. It connects so much to me to the work of reflecting truth in our partnership work. In a context where the racist/domination frames and functions have been operating for so long – which is every context – and in our work of naming and lifting those up through all the tools we have available to us, loss is integral in the healing/transformation journey. There is loss of identity – clear understandings of who I be, as I move outside of the unconscious and conscious domination of the status quo. There is loss of norms – as we seek to shift culture, policy, differentiate roles and functions. There is loss of relationship, as folks peel off from harm experienced in doing this work. And there is loss of idealism and projection, as we move beyond idealization and the projections born in lies. All of these losses show up in different ways, and there are more I am sure. But the function of loss as an indicator of CEO’s work feels very real to me. (Victoria)***



Photo credit: Maza Rey, Deeper Change Forum Dr. Joy Degruy: Racial Justice And The Urgency of Now | November 14 & 15 2018



*The fear (resistance) feels connected to both loss and role, as in, who am I in this work? Does this make me bad, or obsolete? The loss that came up time and again felt like loss related to identity. Identity bound both in ego, perhaps in saviorist/paternalist mentality and in genuine care and desire to do good work. For teachers who identified as hard working, sacrificing, scrappy, inner-city teacher warriors... this work that identified the problematic sides of this mentality was really challenging to people's inner sense of worth and identity. We kept asking ourselves, how is it possible to set this work up so it doesn't feel like such a direct threat to identity? But then, I think it is possible to focus so much on this question, that you end up enabling this pattern by giving that fear so much room to breathe. (TW)*

There are multiple ways that loss showed up in our conversations. There has been mention of loss of power, the sadness that occurs when groups lose hope because of the frustration of not getting as far in their change goals as they desired, and even the idea that organizations seem to lose actual people during change processes. I started to wonder if the expectation of grief is so prevalent and the preconceived expectation that change is about loss might actually lead groups to enact a symbolic death.

I wondered if our expectations that change requires loss actually perpetuates the experience of sadness. In other words, I wondered if organizations in change processes inadvertently push someone out in order to have a unifying experience of loss and grief. We clearly have just touched the surface of this construct of loss. Tyree's comments started to help me shift my own thinking about loss in its relation to movement.

*Living in the loss recently - but there is a movement in it - a rebirth in it - when I think about loss, my perception is not as dark - an ending of something and a beginning ... loss has a way of shaking and awakening to what is important and to what is necessary to keep living and moving. (Tyree)*

I shared with the group my desire to understand the memories of hurt, pain, fear, and discomfort that seem common in change processes while, at the same time, recognizing feelings of release, relief, excitement, hope and, on the best of occasions, deep healing. This sense of differences in who has access to healing arose for me from our conversations, although admittedly this was a construct that surfaced and was named by the group but was not as fully fleshed out in our discussion before we closed the inquiry process.



Organizer's Path, Cohort 2, Closing Retreat January 13, 2019

## ACCESS

### Angela's noticing:

*When it first surfaced, the notion of access was related to the very tangible idea of when CEIO programs were offered and how this related to work schedules of possible participants. Throughout the discussions the notion of access became more nuanced and there was something more about issues of who is in and who is out, how transparent processes are for training and development support, and even the very specific notions of who gets to see themselves as leaders and who can be in the wisdom of the elders.*

### Illuminating inquiry member quote:

**"It reminded me of when I was young and my grandma would tell us about our history" (Isa referring to a Deeper Change Forum).**

Access emerged in multiple ways in the inquiry group conversations, but was solidified for me after a listening session that we held with youth to discuss their experiences of CEIO. Afterwards, my own reflection, shared in our online discussion space was:

*Yesterday, Tyree, TW, Seth, Kimball and myself had the great opportunity to hear nine of the youth participants talk about their experiences with the CEIO Youth work. It was really quite inspiring and encouraging. For me, I woke up after a dream about 3 a.m. and what came forth so clearly was the connection of their sharing to our emerging construct of "access". While the notion of access can often be tokenized, their comments opened up access in its complexity - access to critique, access to engagement in a planning process, access to group support, access to critical thinking/real world action, access to adults not in positions of state authority... and more... And it then brought me full circle to the where the inquiry group started with who has access to discussions about truth and knowledge.*

The youth shared stories of their own development, and what I heard were stories about the access needed to develop leadership in the context of change goals. The youth shared their experiences and development. From fundraising experience, to the opportunities and encouragement to plan and implement their own vision for events, the youth focused on being supported and supporting each other. They also talked about the interactions with those who were providing constructive feedback and supporting youth leadership. The youth valued this space where they could think in terms of their own "legacy" rather than a grade. Key to this sense of possibility was their interactions with Niyonu as the director of CEIO. As one participant stated: "We don't have a lot of places where the person who runs things will sit down and talk to you."

The depth of the youth's analysis of the Youth Program demonstrated the intricacies of the notion of access and helped me to see the multiple ways that the inquiry group was talking about access in connection to the CEIO work.

Both with the youth and with the inquiry group, the connection to CEIO success was intimately tied to connecting with and witnessing a woman of color in leadership. However, the inquiry group members were also very aware of times when Niyonu, as a black woman in a position of authority and with a connection to resources, was not fully accepted in this role. The inquiry group discussed observing the ways in which white folks, women and men, at the front of the room were heard in a more welcoming way.

One example was shared by TW as she reflected on her satisfaction with bringing in a presenter, who was a white woman, to share information about Social Justice Education with her teaching colleagues.

***Staff responded really well. It was very exciting to see them respond to [her] teaching and content. It was also frustrating because it had been many years of our partnership, and watching them respond so quickly to [her] work called into question our ability to trust leadership that was anything other than white and framed in intellectual terms....***

*So, I was feeling like: okay, the staff is willing to accept some stuff from this academic sounding (and obviously amazing) white woman, but when it comes down to actually shifting patterns, not so able. (TW)*

Tyree shared how her response was not one of only witnessing this inequity but of feeling it in relation to her own sense of being a black woman.

*There was something around loss for me - when the Niyonu shift happened to not facilitate the sessions - it went against what the whole purpose was - when this person of color with all this knowledge and skill was made to be a villain - not because of what she was but because of what was coming up for others - it was what does this mean for me - it was like one more black woman down. She was me and I was her - I felt the loss of power, loss of relevance, loss of significance. (Tyree)*

Niyonu noted that her connection to resources made it easier to be very direct in the purpose of the CEIO partnerships and even to discontinue a partnership when it was realized that there were different visions of what the equity work involved.

However, the risk of being associated with change energy and truth-telling was experienced differently by others, particularly people of color, who stepped up only to find that there were ramifications for being visible in the change work. Judy pointed to her pain in hearing about the experiences of people who were at risk and reminded us all that white people organizing have to be aware of the risks taken by people of color, when they speak their truths in organizational settings where people of color do not hold top positions of authority. With the nods and affirmative sounds of everyone in the group, Tyree talked about the pressures on those involved in change within organizations:

*What Seth has so beautifully described is not a unique story. I have seen it in at least four or five other organizations. And even if I really think about it, it has to be more than that. And so it's just like I can't be the only one. That's what frustrates me with this whole process because every time I hear it, it's like a new isolated experience but it's not; it's repetitive of the same thing. Unfortunately it's a live experience for me so I know how it ends in most cases and always with*

*the door keepers locking the door and exiting out of the process and letting go of the people who want to keep talking about it.*

TW talked about the experiences of people who were pushed out of organizations and who were not recognized or valued for the change work they were doing. The inquiry group also reflected on how white staff who left organizations were better able to continue their work and careers than the people of color who had to leave their employment.

### Sonja described it this way:

*We are again at a point where people of color are highly visible in their vulnerability to addressing what shows up. We just had a meeting yesterday and someone spoke out and that particular comment was pulled out as - these are my words - as unacceptably challenging. The unacceptably challenging comment was made afterwards. In the meeting, I am standing in the front of the room and internally saying "Good, hey, good job. Hold that space. Don't let it go. Good job." Cause I know it was hard for her. And at some level I was thinking this room is ready to hold this. And this is not the first time, but another time, afterwards getting the feedback that "no we are actually not ready to hold this." It's like indicators crossing. One indicator of success that you are moving and another indicator that you are not moving. And again, all of this around people of color speaking out and their vulnerability.*

Even though inclusion meant potential risk for those who showed up fully, a key aspect of access was connected to the CEIO emphasis on whole systems. Working with partner organizations in a whole system approach meant that individuals in different locations across the organizations would have access to training, conversations, and decision-making in ways traditionally not inclusive of all participants in the hierarchical structure.

It is important to emphasize that, through the CEIO work, the consistent notion was one of invitation and there was acknowledgment that people choose how they show up. Inquiry group members often referred to Niyonu's question during interactions with partners of "what is it that you have signed up for." While this



could seem like almost the opposite of access, with an air of resentment around some really doing the work and others not, the invitation exemplifies that co-creation brings the reality of willingness and the idea of access together in a very strong way.

One way that access manifested in the inquiry group was in relation to CEIO offerings. Particularly when referring to the Organizer's Path, Nataliya discussed the very first documents that she received and commented on the detailed nature of these. She referred to two documents, one being the Organizer's Path schedule of meetings and one being the overall description of the Organizer's Path.

***The first helped me see if I could participate and the other helped me decide if I wanted to participate.***

Inquiry group participants repeatedly referred to "expanding the circle" in relation to CEIO offerings, the work of social justice, and the inquiry group learning itself. For example, Victoria emphasized how integral the involvement of "those affected" was to CEIO work.

Issues of access and inclusion were not only directed outwardly. The questions of access were related to the CEIO design itself. **As Judy affirmed:**

***One of the things that rises up for me when I think about CEIO and access is the early decision that was made to focus outreach to community-serving organizations - which creates an audience of gatekeepers at our events. The existence of a youth***

***program is because youth demanded it.***

***Other populations in the community may not have been heard in that way. I'm not saying this is right or wrong - I'm noticing and wondering in what ways CEIO can intentionally consider how to show up in a more direct way in the community.***

Access is connected to who is valued and who is given the opportunity to develop the skills, the experiences of organizational leadership, and a public voice. Access is not solely opening up positions; it is opening up power in a way where one can be successful. Access is not simply about who is at the table and who can speak, but about who ultimately gets heard and who gets to participate in ways that lead their vision to change.

CEIO has increasingly provided access to the wisdom of liberation, to the elders, and to spaces where the values, language, and energy of liberation is not unique or novel. These were spaces where the values of liberation are normalized through language, practices, and being supported by the growing community. This is crucial for social movement learning as too often, the values of equity and inclusion are not the water we all swim in. Being in spaces where these values are normalized provides room for development that can't happen in spaces of continual opposition. People and groups need both the analytic tools to open up the possibility of change and also the experiential and embodied memories of what it feels like to be in an inclusive space.



Photo credit: Franzel Ansah, 2016 CEIO Youth Program Retreat

## MORE CHANGE CONSTRUCTS?

In our last inquiry group conversation, Kimball reflected how interesting it was that the idea of “relationships” had not been named as a construct even though it was clear how important the relational is to change. My notes from the process suggested that some other possible constructs could have been “voice” or “valuing”, which had both come up repeatedly in relation to the chosen constructs.

Through our dialogue, the group had also shared observations about “time” and how notions of time and perceptions of time influenced change process. In reflection, **Judy shared** how time came up in CEIO itself.

*Something about the practice of mindfulness and stillness and (occasional) role of silence amongst the business and sense of urgency to do what we are here to do (getting caught up in executing the workplan, delivering the CPT agendas at CPT meetings, completing the OP curriculum, delivering a Deeper Change Season, a youth program) the arc of the work and who does what to make that happen, how roles change over time...*

The group discussed when lack of time was used as part of entrenchment and resistance. They discussed the importance of time in between meetings, and over the course of meetings, and time needed for processing in ways that could not happen immediately or rapidly.

The group also talked about fear and the importance of not reacting from pain and fear. They discussed the roots of fear and anxiety and ways that we can inadvertently enable fear and give it more “breathing room” than is useful.

Kimball pondered the process of change and whether our change constructs would fit into a pattern or stages over time like those acknowledged in grief. For Sonja, it was more of a bouncing around and acknowledgment that you could enter into a change process from any place – through resistance, through loss, through codification, through roles, or through structure.

Finally, the group noted that there might be some mis-perception about the importance of “power” in the constructs as it had not been named as a separate construct. We realized that for us, understanding power was what all of the constructs were about, and I think the group shared in my belief that our work together, in surfacing and deepening notions of power, could inform and advance social justice.

Even though the inquiry group recognized at the end of our time together that there were more constructs that we could have generated, there was a shared sense that what we had surfaced was indeed important and relevant beyond any individual’s context. In our last conversation, the group talked about the change constructs and questioned their applicability to each of the CEIO programs. We closed the inquiry work with a comfort that, although another group of people going through the same inquiry process might have yielded different constructs, the value of the constructs this group surfaced resonated beyond the CEIO work into other contexts where members were involved.



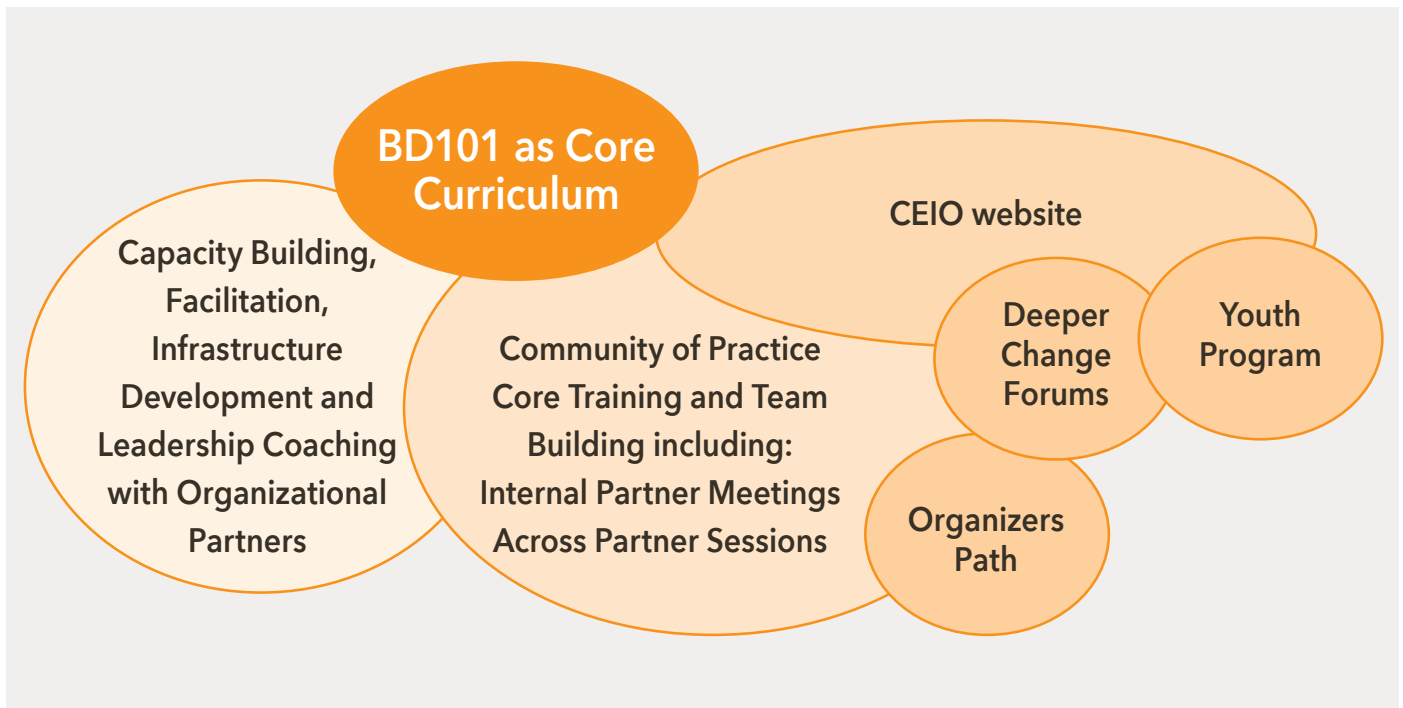
Photo credit: Maza Rey, Deeper Change Forum Post Session Affinity Healing Group

# WAYS OF UNDERSTANDING CEIO EFFECTIVENESS

Through the knowledge opportunity scan, engaging with Niyonu, and attending BD101 and various CEIO meetings over an approximately six-month period, it became clear to me that there were many ways to come to understand and share the impact of CEIO. Each of them would ultimately be incomplete, but would still provide a legitimate (within the fields of nonprofit and philanthropy research) view of CEIO impact. Each would align with a particular aspect of CEIO's effectiveness.

## CEIO AS PROGRAMMING

Perhaps the most obvious way to explore CEIO effectiveness is to treat CEIO programmatically by tracing investments of time, talent, and treasure into CEIO infrastructure, activities, and funding of targeted individuals, organizations, and a broader community.



CEIO's approach involves multiple programmatic components, including:

- investing in New Haven organizations who hold community missions and who are willing to embrace a social justice understanding of themselves and their role in community;
- investing in leadership across the work with organizations, youth, and organizers;
- providing informational, experiential, and infrastructure resources to a broader social transformation network through forums, short-term retreat-like trainings, and connections to development opportunities such as leadership programs.



Understanding CEIO programmatically involves examining the structures put in place and the interactions and functioning of the leadership partnership, the leadership team, and the management function – including the administrative/event coordination and communications support – as well as, the CEIO Core Team, the Capacity Building & Training Partners, and the leadership of the Youth Program and the Organizer’s Path.

A programmatic understanding also lends itself to tracing the roles and functions related to program implementation and the funding components -- including grantmaking, stipend support, and other operational costs, such as meeting space, technology, and speaker fees along with the structuring of these costs and related investments.

We have not chosen to collect this type of information here. However, after attending a number of CEIO events over one year, including a reflective event focused specifically on BD101 past, I consistently heard individual stories of growth from people who credit CEIO – individuals who found their voice, shifted their sense of self-worth, found support and strength to make life shifts in their careers, their goals, or their connection to spiritual beliefs. This perception extends to the communal space created at events such as the Deeper Change Forum where participants establish connections and shared sense of values.

Specifically at the BD101 reunion of Connecticut participants event, past participants openly shared their experiences as transformational – noting the benefit of having a language and frameworks to describe what they see happening around them, how being in the presence of others who shared similar views and values helped them not to feel alone, how putting words to the oppression that they felt – and understanding that oppression more deeply – all enabled a transformation and an acceptance of their whole selves.

## CEIO AS COMMUNITY OF PRACTICE

Another possible perspective of CEIO is as designer, guide, and facilitator of a community of practice focused on organizational and societal change through the development of individuals and groups.

**CEIO partners with community-serving organizations and community organizers to become a Community of Practice in order to be more just, inclusive and consciously co-creative. (Spann, 2014)**

Communities of practice are arrangements for learning together in relation to shared roles, purposes, responsibilities and ways of being. They are based in the sharing of action stories in a space of critical friendship and commitment to continuous improvement and development of know-how related to the particular field of the community.

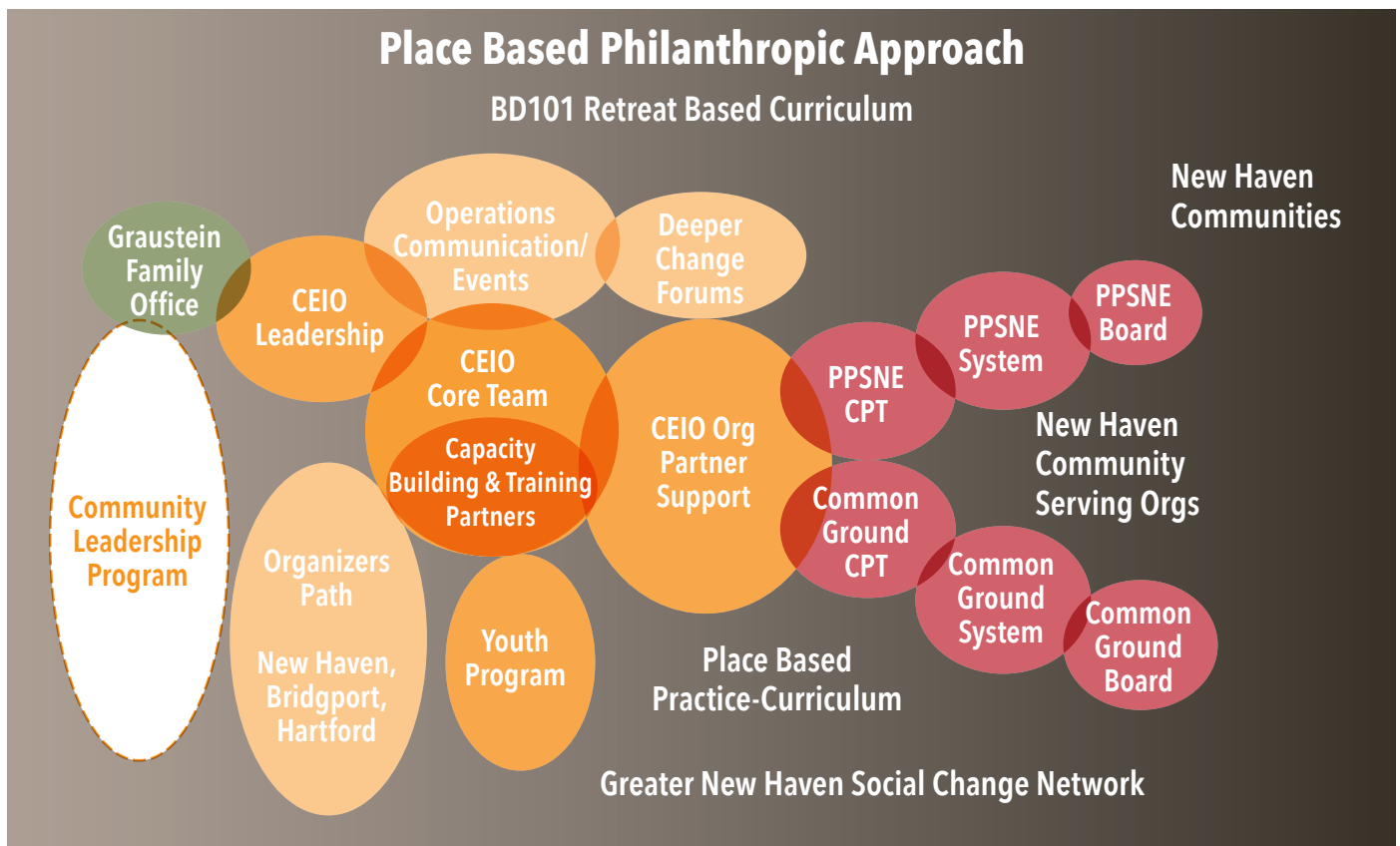
To delve into effectiveness from this view, is to identify how a shared language is infused, adopted, and utilized within and across organizations. An extensive map of partners and organizations emerges of individual participants that attend events and trainings. Going deeper into the community of practice surfaces frameworks and perceptions of value and the specific actions or changes that individuals relate directly to their interaction with CEIO efforts. An even deeper dive surfaces the structures of partnerships that intersect the community of practice. One example of such a structure is the core partnership teams – an internal structure that brings together organizational members from across departments and layers of the organizational hierarchy.

## CEIO AS AMPLIFIER AND NETWORK CONNECTOR

Another key aspect of CEIO's effectiveness is CEIO's action as **amplifier** and **network connector**. Each year the number of people and organizations that connect through CEIO increases. There are numerous stories of how these connections, how the opportunity to engage in dialogue and how CEIO's frameworks and ways of being have inspired deeper relationships across and beyond New Haven. By amplifying the concepts and values of liberation, CEIO has created spaces where these ideas are not only discussed but are practiced and normalized. By providing

consistency in the offerings that create these spaces, CEIO's efforts are encouraging community rejuvenation and healing.

The diagram below combines the programmatic, community of practice, and amplifier/network connector views of CEIO work. It is one visualization of the many moving parts and connections of CEIO with attention to the direction from within CEIO partnerships and out to a broader network of change. *(Note, the organizations represented here are those that were active in 2018, at the time of my entry into documentation.)*



Each of these aspects of CEIO effectiveness could be a focus for evaluation, assessment, documentation and story sharing and would contribute to a fuller articulation of CEIO effectiveness. However, alone, none of the above would help us in truly capturing the power of CEIO in its full potential as a “transformational” investment. For this, I believe we need to foreground CEIO in its movement building energy.

## CEIO AS MOVEMENT BUILDING FOR EQUITY

I have to acknowledge here that I was never told, nor could I find in any of the CEIO documentation, any mention or connection of CEIO to social movements. Its design was securely grounded in a philanthropic investment for supporting community-serving organizations and in the theories of liberation as they relate to ideas of organizational and community development. Indeed, much of the CEIO emphasis is based in organizational development theory, with tools that are akin to tried and true action planning and continuous improvement approaches. However, the underlying “ways of being” of CEIO and the way that the work is led, implemented, and greeted by social change practitioners pulled me to understand the work in its **social movement-building energy**.

As an organization, I sometimes think of CEIO as organic, sometimes as a “matrixed” organization, and sometimes as a “incubator” organization. It is important to note that CEIO is not a 501(c)(3) nonprofit or a formalized philanthropic program. CEIO operates as a giving partnership with independent consultants forming the teams that support the programming and work. This is important because the format requires both a level of independence in functioning and a masterful coordination to achieve a coherence of values and approach. From my vantage point, the core team meetings and the capacity building meetings are the central location that makes the diffuseness come together consistently. In addition, the approach to each of the “program” components calls forth a quality of leadership responsibility and intentional support. As structured, teams of core members offer support to those responsible for programming. This includes providing a listening ear, constructive affirmation and ideas for adjustment. These teams also provide a structured way for learning to happen across program areas.

This very intentional organizational approach at the center is crucial to recognizing the ways that movements are created and supported. Movement-building is often espoused in philanthropic strategy and contemplated in ideas of community change. However, social movements and change remain elusive, particularly in current philanthropy and nonprofit approaches that take a professional-

ized and economic cost/benefit approach to understanding. CEIO marks a unique research possibility to learn about movement-building in a way that is grounded, not in conventional theories of political action, but rather in the very grounded realities of “being” and “practice.”

In short, movements grow and are sustained by increasing the number of people who understand and adopt specific “ways of being” in the world that involve changing how power is held and utilized. Movement participants support each other in these understandings and behaviors that, when deeply internalized, become the movement’s “ways of being” and connect participants to a sense of community, an experience of wholeness, and an experience of being part of something greater than oneself. Movements are spiritual and deeply pedagogic.

Everything about Bill and Niyonu’s partnership and initial creation of CEIO was pedagogic – from Niyonu’s creation of BD101 as a learning space, to Bill’s experience of BD101, to Bill and Niyonu’s agreement to bring the notions of co-creation to New Haven. Pedagogic intention is embedded in their dedication to learning together, the practices of reflection, and the invitation to learn together through the CEIO work. Recognizing this pedagogic intention also as the focus of an inquiry framing, presented a clear opportunity for the CEIO inquiry to illuminate mechanisms of movement building.

I entered the CEIO inquiry through a philanthropic strategy interest. I used to refer to scaling “out” rather than “up” to highlight the need to expand the reach of value-driven efforts. As I conclude this report, I realize that it has never been clearer to me that CEIO is not encompassed in a nonprofit notion of “scaling up” or an idea of replication that is about trying to make a concrete model to impose on other locations and contexts. It is apparent that there is a desire amongst a broader circle of participants for continuation and expansion of CEIO experiences. I would not be stretching too far by saying that there is a “longing” for CEIO to reach deeper and further.

However, as I engaged in CEIO meetings, events, and discussions, I started to grasp the essence of CEIO as an embodied phenomenon – whose expansion is about “energizing” hubs of change. CEIO seems to be more of a calling to be answered.



The longing I am sensing brings me back to the spiral motion continually pulling inward while expanding outward. I envision CEIO in its social movement potential as a consciousness and leadership expanding effort that embodies the key aspects of shared language; common experiences that lead to embodied memory, commitments, and mutual care; connections to mind, body, and spirit; analytic frames for understanding self and the world and the conscious use of power; and a culture of being that supports healing-based action and dismantles systems of oppression.

“How does CEIO show up in the world” was the question that began our inquiry and presented me with the challenge of co-designing a methodology that would respond to this question. In the participant agreement form, I described it this way:

***The overall purpose of the inquiry project is to engage participants in a systematic group inquiry process that will help CEIO leadership, participants, and the broader public to understand the ways in which the CEIO approach shows up in the world. Other terms we may use include how ideas, concepts, and practices manifest in our daily lives or how these understandings lead to changes that we can identify and describe.***

As I went deeper into the process and heard questions from Niyonu and the CEIO Core Team, I realized that the possible response to the stated question was not one of documenting outcomes but rather required a stance of revealing. The question called for making visible.

This report is about our first step toward making visible, through my engagement with CEIO and through the inquiry group’s interaction with both, the part and the whole. In academic language this is referred to as a “dialectic” which is the notion of each “part” containing all the information of the “whole” – a notion akin to a scientific idea of a holograph. The report admittedly marked a first layer of exploration. Nevertheless, even as a first layer, by design, the application of this inquiry is already underway because of its inherent group process. Application began with the group process itself and the

conversations that were made possible inside the group. The inquiry is already being applied by inquiry group members in their continued change work. Through sharing with the CEIO Core and Leadership Teams, understandings have begun to inform the continued CEIO work.

Both in our last inquiry group meeting and in the sharing with the Core Team, ideas have been generated about how to further utilize the components of the inquiry. One example expressed was utilizing the inquiry intentions to introduce new participants to CEIO programs, such as the Organizer’s Path. Another suggestion was made to utilize the change constructs as the focus of a Deeper Change Forum with various performance artists representing the constructs. Another possibility shared was to utilize the change constructs as a reflective tool with partner organizations as a way for community serving organizations to reflect on their efforts and to think through the sustaining of equity work beyond the CEIO partnership.

Rather than add to these possible programmatic actions, suggestions which I believe are more grounded and realistic coming from inside the CEIO team, I want to close with offering some ways that this inquiry work might continue to inform CEIO efforts. As noted earlier, the question of “How does CEIO show up in the world?” or “How does it manifest?” is a complex one because revealing its essence requires holding multiple component queries as we find them on our path to making visible the whole.

- ***How change efforts are greeted in practice***
- ***How a change curriculum enables change efforts***
- ***How change workers notice and name progress***
- ***How change practitioners understand and support each other across oppressive structures***

These questions seem appropriate to exploring the contributions that this inquiry process may continue to make to CEIO efforts and effectiveness.

## HOW CHANGE EFFORTS ARE GREETED IN PRACTICE

This inquiry process provided a space for the change workers that comprised the inquiry group to surface the ways in which change efforts are met by individuals and organizations. In our last inquiry group conversation, one member talked about her experiences trying to take the CEIO practices to various community contexts.

The change constructs are articulations about how CEIO change work was met by individuals and organizations and only the beginning of how organizational and group dynamics were met by a CEIO way of being. The change constructs developed by the inquiry group have a potential to support change agents in noticing and identifying the processes of change. The change constructs can also provide touchpoints as CEIO participants try to bring the tools and experiences of CEIO to other settings, together widening the circle and expanding the practice of heart centered change.

## HOW A CHANGE CURRICULUM ENABLES CHANGE EFFORTS

Do you remember the “string-art” fad back in the 70s? In one inquiry group discussion, the image of string art came to me as group members were talking across and around and between the change constructs that were surfacing. It seemed that the organizational development field’s tendency to create rigid boxes and linear processes was totally blown away by how the group members were actually talking about their experiences of change.

The CEIO inquiry discussion showcased the craft of change work. Change work seemed to be about identifying an energy, anchoring to a notion and sometimes a tool, and then moving to another and anchoring there. Social justice change is not a linear process, but rather, in CEIO, there seems to be a guiding vision and an operational need that motivates the capacity building and guides it in an appropriate direction. Witnessing CEIO core team meetings and listening to the decision-making processes confirmed a fluid and yet deeply grounded group process

centered in surfacing community desire and organizational needs. With BD101 as a core curriculum and various additional CEIO generated technologies for understanding where an organization and community are in the process of transformation, a pedagogy of transformation continues to emerge from the practice of change.

## HOW CHANGE WORKERS NOTICE AND NAME PROGRESS

Inclusion is a continuous process with equity as a seemingly far away goal. Organizational leaders, staff, and capacity builders want to know if their equity work is on the right track. A director of one of CEIO’s partner organizations shared how difficult social justice “progress” is to convey to her board when the work doesn’t easily align with traditional notions of organizational performance and executive success. For example, the idea of staff perception of comfort is sometimes used as an indicator of success. However, if a change process is working, comfort may not be the best indicator.

Although social justice does not proceed or sustain in a linear fashion, nor always with clear-cut measurable indicators, there is nevertheless an opportunity to identify signs of positive change. I wondered throughout the inquiry process if a rubric, even if it is one that does not lend itself to simple check-offs, might provide a framing for participants to notice progress together.

Although the inquiry group was not charged with developing a rubric, a few examples appeared to me during the conversations:

- **Identification of structural aspects**

In conversation, the inquiry group talked about aspects of organizational structure that could be highlighted and questioned in relation to social justice. For example, language use, cultural components, communication paths, compensation, decision processes, and role definition are all components that we could question in the form of a rubric with possible characteristics attached that could point toward progress.

- **Nature and use of codification**

The inquiry group discussed codification at length, particularly the ways in which codification is enacted and its connection (or not) to transparency, value-clarity, and telling a history of social justice intentions. All could be incorporated into a rubric for organizational self-analysis or a tool for capacity builders.

- **Direction and application of power**

Inquiry group conversations included notions of values and how people see their work in community-serving organizations. I pondered if, in traditional structures, employees utilize their positional power in an organization where they are employed to benefit their own personal circumstance. The inquiry group seemed to be advocating that social justice organizations are places where employees utilize their positional power outside the organization (derived through money, identity, affiliation networks, voice) to strengthen the mission of the organization in service to the community.

The above are just three examples that surfaced during the inquiry process. I share them here as beginning examples of the potential for shared inquiry to lead to a rubric that could support organizations in connecting the CEIO change approach to success that can be documented in more traditional and evaluative ways recognized in the nonprofit sector.

## HOW CHANGE PRACTITIONERS UNDERSTAND AND SUPPORT EACH OTHER ACROSS OPPRESSIVE STRUCTURES

During the inquiry process, I started to think more deeply about the ideas of success from change work across the boundaries of isms. I often thought back to Ruby Sales at a Deeper Change Forum talking about various struggles for freedom. Although she was referring to ethnic groups in her talk, it prompted a question for me about the differences in change approaches targeted toward specific oppressions.

I was drawn to CEIO as an anti-oppression approach because I believe strongly that it is oppression itself that must be addressed even as we seek to change the uniquely embedded structures of racism, sexism, classicism, and more.

At the same time, with Ruby's prompt, I have started to see glimmers of how various traditions of "change" work bump up against each other in practice. I have continued to wonder what calls people to an holistic mind/body/spirit way of being even after a deep grounding in any specific tradition of social justice theory. I worry about how the differences in social movements designed to address specific inequities may perhaps limit the solidarity across anti-oppression efforts.

We do need to analyze the structures of specific inequities such as race, class and gender as they show up. It is critical to identify the intersectionality across these categories and specific contexts. However, our next stage in social change inquiry is to trace the paths of feminist action – alongside those of racial justice – alongside those of economic justice – and to notice how our own located training interacts with those of the people around us. This inquiry would be about illuminating the tensions *within* social justice awareness and action, and it would be about widening the circle of change agents whose change traditions are tightly bound by languages of specific social justice histories and traditions. Engaging the various social justice approaches in a pedagogical way could provide this opportunity.

Probably not surprisingly, I end this report here with no grand conclusions or assertions but rather an invitation to continued exploration and revelation (in the sense of revealing) of the essence and illuminating of CEIO's ways of being in the world -- as an embodied and pedagogic movement of connection across social justice awareness and action.



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*Photo credit: Maza Rey, Dream & Activation Deeper Change Forum, September 26, 2019*









## LOCAL CONTEXT

CEIO is based in New Haven, Connecticut. According to the 2010 census, New Haven is the 2nd largest city in Connecticut in terms of population. Connecticut, a state that includes 169 separate political jurisdictions, has been identified as one of the wealthiest geographic locations in the world. Established in 1638, the original group to target New Haven as a possible colony is said to have “included the largest population of wealthy men ever to venture to New England from Britain.” Add that the group included those seeking religious freedom, and New Haven’s past securely connects it to New England mores. Not surprisingly, New Haven is further steeped in historical colonialism and stark provinciality indicative of the formation of the religious communities of the time. Nevertheless, by the 1700s, New Haven residents had embraced the energy of protest against British taxation, and residents today celebrate the city’s historic involvement in the American Revolution ([www.teachersinstitute.yale.edu](http://www.teachersinstitute.yale.edu)).

New Haven has similar socio-economic characteristics of under-resourced contemporary urban areas. However, New Haven is a place where extremes in wealth and privilege exist in close proximity to each other. Yale University, Connecticut’s Ivy League institution and symbol of academic wealth, sits within a resident poverty rate of approximately 25% with even more (at least 40%) residents struggling “to afford basic necessities like housing and food”\*. Over the years, news headlines have repeatedly reported about the divisiveness and frustration that results from need, disparity, and outrage. Waves of social justice efforts have been documented in New Haven along the path towards equity and change. These span the 60s’ anti-war, anti-racism, and women’s liberation demonstrations and the more recent protests of police shootings of unarmed black men and women. To this day, New Haven continues to be a visible location of protest.



Photo credit: Tom Ficklin, Deeper Change Forum, Naima & Leah Penniman, *Ending Racism: A Toolkit For the Spiritual Activist* | December 6, 2016

Less visible, in a popular sense, are the waves of federal grant efforts that have been labeled as strategy “demonstrations” for alleviation of entrenched poverty. Past familiar national grant programs that have infused New Haven with both funding and ideologies of change include the Model Cities Demonstration and Enterprise Zone program. More recent federal infusions have come through Urban Development Action Grants, the Moving to Work Demonstration, and the Rental Assistance Demonstration.

At the same time, and sometimes in response to the lack of community engagement required by various federal attempts at urban renewal, private philanthropic demonstrations have originated at-large national foundations. One historic example that included New Haven as a site was the Ford Foundation’s Gray Areas Program. A more recent example, with a more complex public/private support structure between the Ford Foundation and the Department of Housing and Urban Development, is the Manpower Demonstration Program. Each of these examples, and the many that have not been named here, provided direct funding and, in turn, have informed and influenced New Haven change efforts.

Even though federal and national philanthropic investments may be less visible in the media than local politics and budget issues, there is a sense on the

ground that the Yale presence has attracted investment and consequently, has led to countless academic research projects and even more nonprofit startups created by well-meaning and energetic graduates. Both are critiqued for originating outside of community understandings and values. An additional critique is made of the countless research surveys and program evaluations, particularly in low income communities of color in the city. One perception is that programming and resource investment has not followed the researched evidence of need and that “demonstrations” have often not led to any sustainable changes to the socio-economics challenges.

CEIO, in its “place-based” focus in New Haven, is occurring at an important time and context alongside the civic sector overall and philanthropy more specifically. Philanthropy is attempting to find a way into a civic discourse and practice that is grounded in past civil rights struggle and successes and yet, uniquely suited for a contemporary context that many believe is critically different.

CEIO thus emerges in a setting where change work is tasked with bringing forward the wisdom of past struggles for freedom, equality, and opportunity into a form relevant to today’s efforts toward social change, justice, and equity.

*\*CARE. (2017). Retrieved from <https://www.ctdatahaven.org/data-resources/state-hunger-new-haven-report-food-in-security-and-recommendations-action-2017-2018>*

## CEIO PILOT PHASE

As a grounding for understanding the post-pilot phase of CEIO, it is important to provide a bit about its start. Early documentation of the CEIO design and development conveys the deep exploration that led to a pilot phase. Initially, the investment was framed as the Transformational Giving Project, located securely in the realm of philanthropic giving.

**We envision a New Haven where the voices of all community members are included when making decisions that impact their lives ~ where there is a living practice in creative agency. We envision organizations that have committed to serve this community as having leadership and governing boards that reflect and insist on the inclusion of all voices. Community members bring themselves fully ~ their powerful stories and their practical needs. Community members and the organizations that serve them act from a place of loving responsibility to all.**

**The Transformational Giving Project (TGP) supports this vision with funding and training. It operates at every level as a just and inclusive foundation. TGP is itself a living practice in creative agency. The Staff, Advisory Board and its grant making process insist on the inclusion of all stakeholder voices. TGP acts from a place of loving responsibility to all. We envision a New Haven and a TGP Foundation where fun, imagination, vigorous truthfulness and justice abound. (Spann, 2010)**

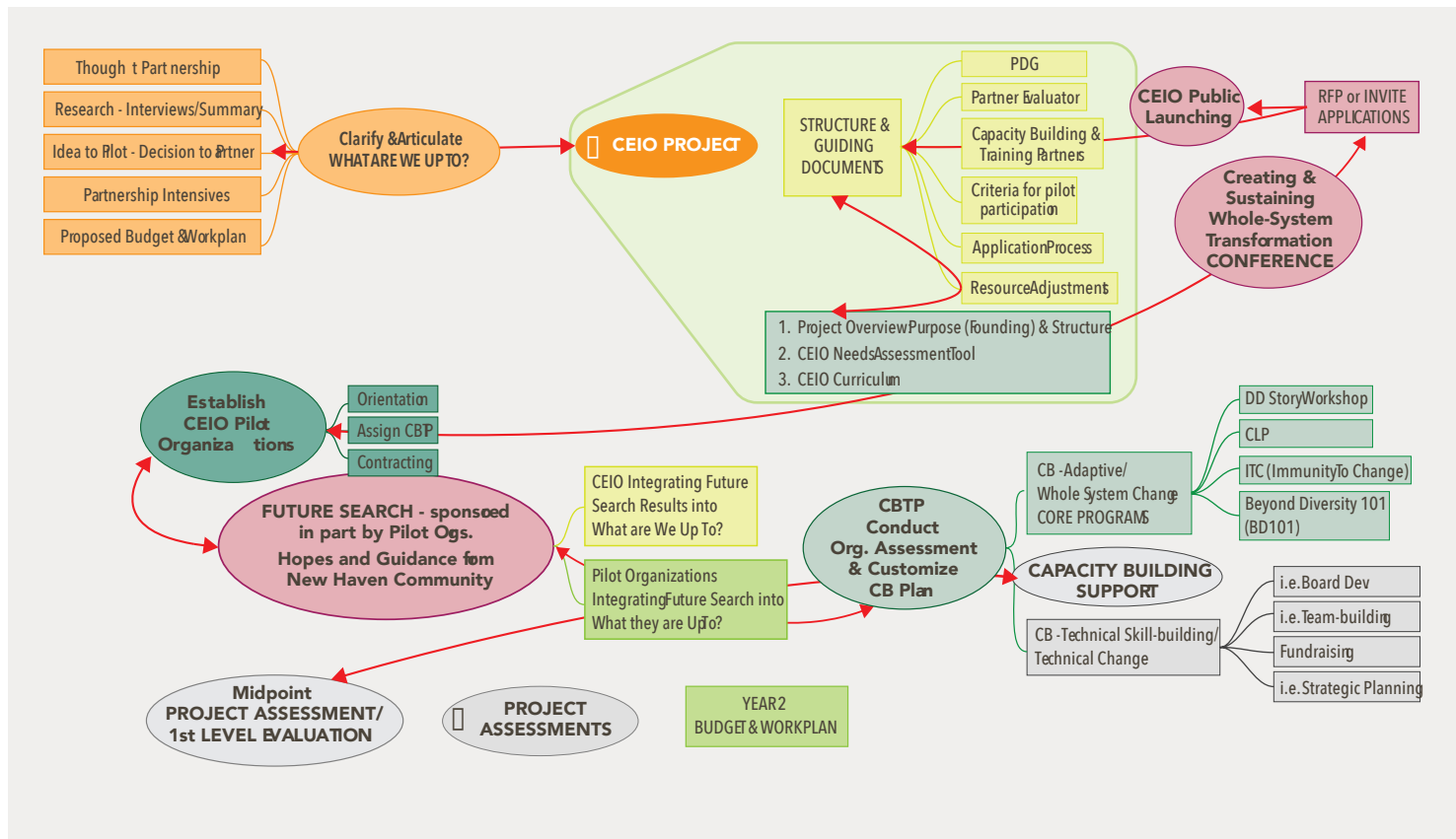
Not surprisingly, the founding partners embraced a very intentional visioning and piloting process. In the very beginnings, Niyonu and Bill invited in a variety of supporters to help “hold space” for Niyonu and Bill, as two souls from very different life experiences, to co-create together in self-reflective, honest and intentional ways. In the culture of CEIO, “holding space” means focusing affirming energy and support for the intentions that individuals set for themselves or with each other. At this stage of the process, the supports came from a sage coach experienced in change work and a project development group committed to mirroring back dynamics and tendencies to Niyonu and Bill. This mirroring was intended to strengthen their potential to be conscious in their co-creation.

At the next operational level, CEIO included an organizational team engaged with the programming and various pilot organizations. There was also a growing extended circle of friends that supported, awaited and contributed to the energy.

CEIO’s organizational partner approach involves working with New Haven community-serving organizations who apply for the partnership. Community organizations are chosen based on their commitment to social justice and their understandings of themselves and their role in community. Each partner organization receives financial investment through CEIO and support in facilitating and creating an internal structure to strengthen their inclusion goals. For example, each partner organization is supported in developing a core partnership team (CPT), whose members come from across functions, roles, and hierarchy of the organization.



An early project map from 2011 provides a visual to the startup efforts of CEIO. I insert this graphic here to show the multi-faceted, connected, and inter-relational nature of CEIO that was present from its beginnings.



Its complexity and fluidness make it challenging to document or evaluate, in a traditional sense, what CEIO is up to in any phase of its development. The pilot phase activities and learning are captured in an evaluation conducted by Sally Leiderman\*. However, much has been experienced, learned, changed, and adapted since then. Shifting from the CEIO pilot phase and its evaluation to this implementation phase inquiry involves an approach that highlights opportunities, whole systems change and knowingness as the core of inquiry work.

\*Center for Assessment and Policy Development. (2014). CEIO Evaluation Report.

## KNOWLEDGE OPPORTUNITY SCANNING

“To enter into this inquiry work, I needed to start to understand the intentions, values, and structures of CEIO. I utilized a semi-structured approach - that I call “knowledge opportunity scanning” - for this exploration. (<https://kd2change.com/knowledge-opportunity-scanning-development/>). Ultimately, the knowledge scan led to a co-designed knowledge development approach.

This scanning involved:

- Gathering background information through conversation, documents, and participation in select, already occurring meetings.
- Collecting functional information such as activity logs, organizational charts, program diagrams, staffing, location and scope of services.
- Mapping out the information readily available (often written and stored) that is captured or produced through the daily or cyclical operations. Examples include meeting notes, communication done through electronic platforms, and formal correspondence.
- Identifying existing spaces and paths of meaning-making. Here I was looking for programmatic, management, decision-making, and action structures as opportunities for exchange and shared meaning-making.

It was intended to:

- illuminate underlying and often unseen logic structure(s) from which knowing is made credible and actionable in the group
- surface and highlight possible meaning-making paths and spaces in the existing practice
- notice existing frames and open-up the possible utility of additional frames
- identify data making opportunities for further inquiry processes

Through the scanning, what I began to appreciate was the multi-faceted operational nature of CEIO. CEIO invests in the gifts of individuals of the CEIO team, who come

together as resources for community transformation. The management of the multiple components is achieved through administrative, programming, and communication functional supports.

Independent contractors serve as this “core” team with a subset of the contractors forming the Capacity Building & Training Partners (CBTPs) that lead aspects of the programmatic work. The CBTP contractors provide feedback to the efforts overall through core and capacity team meetings. When called upon, they form a matrix structure, interacting in lead and support roles to staff one or more of the programmatic components. For example, both the youth program and the program called the Organizer’s Path have lead facilitators and tap into additional core team members to serve as a sounding board, critical friend, and coach for the specified program. This matrix formation serves to support decision-making and provides an informal, fluid learning mechanism across elements of the work. When presented with this idea of “matrixed” organization, Niyonu describes an image of swirls moving alongside each other, with colors intersecting and changing in connection to each other, forming a movement that operates as a musical piece more than a stagnant image.

Information abounds in CEIO. In addition to vision documents, background research and third-party documentation from CEIO’s early development and pilot period, there are multiple forms of organic and current information sources. The multiple facets of CEIO efforts lead to written documents, including public communications and programmatic materials from within CEIO itself and its partnership efforts. Basecamp is the online communications platform that holds various, often one-way communications with respect to the various internal and partner team configurations. A variety of information components are connected to the Deeper Change Forums, including registration information, videos, and post event evaluations geared mainly toward gathering ideas for improvement of offerings. Theory of change writings provide some outline and bullet points related to specific strategy and anticipated outcomes. All of this information was available for scanning and

could also be made into “data” through an intentional action of connecting information to both a question and a framework for making sense out of the data.

However, more importantly to our desire for shared meaning-making, the scan provided a way to look beyond the possibilities of documenting the information about CEIO toward identifying spaces and pathways where dialogue and conversation are continually building CEIO. There are multiple of these in CEIO, especially because of the reflective orientation of the work. The core team meetings, CPT meetings, cohort meetings of both the organizers and the youth, and Deeper Change forums are important dialogic spaces. These must be distinguished from communication exchanges where information flows one way, or feedback is limited to the specific communication event. Spaces and pathways, rather, involve dialogue about the events, concepts, and experiences where meaning transcends the specific communication moment.

The distinguishing fact is CEIO has a way of being and engaging that values inclusion of all those involved, rather than solely the authority in the room.

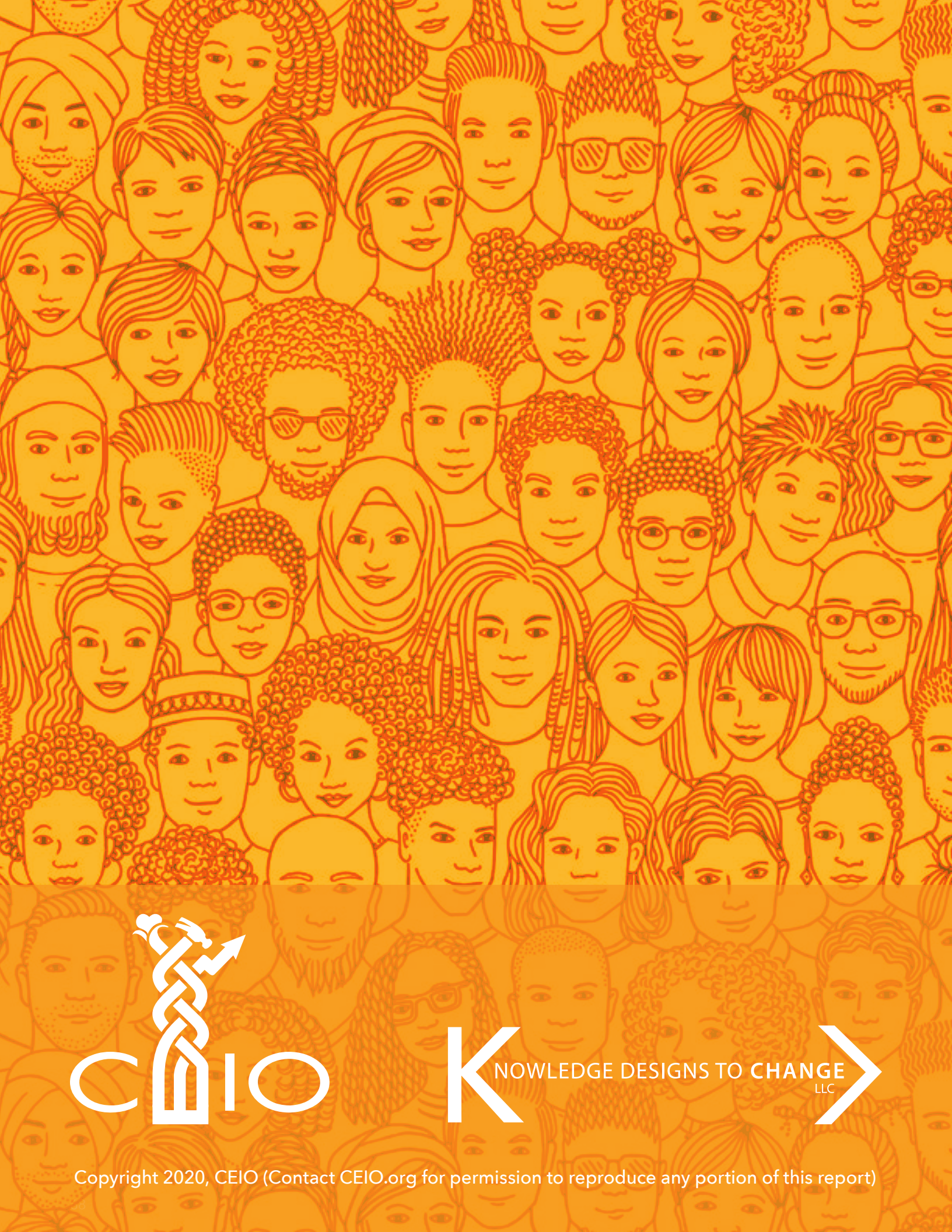
The shift from writing about, to understanding from within CEIO, prompted us to capture the experience in a new way. The various CEIO interactions and the artifacts that are connected to these interactions can be considered the primary “text” of the CEIO work. I sought to analyze this text as core indicators and representation of CEIO impact. This may seem like an esoteric distinction, but there is a critical difference between observing the doing and encountering being. One can be done as an outsider and the other requires an embedded location and openness to experiencing in relation to others. While we can point to and target outcomes by counting the number of times someone claims that something has happened or calculating the amount of dollars needed to result in a specific, predictable activity, understanding the impact of “ways of being” is different. Being shows up, and thus can only be illuminated in its effect on the world around it. After scanning CEIO, this intention on being led to a group inquiry process where meaning-making became the effective approach to an inquiry for understanding whole system change.







Lined area for notes.



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