FCSS

Policy and systems change

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Part 1
Policy and systems change in the non-profit sector

Non-profit organizations are commonly recognized for their societal roles as service providers supporting individual and community well-being. The non-profit sector also plays an important role in providing opportunities for civic engagement and shaping of municipal, provincial and national policy through policy and systems change efforts.[1]

The purpose of this brief is to provide a broad understanding of what policy and systems change are and the wide range of activities that are involved. Non-profit organizations are engaged in policy and systems work all the time, although some might have limited formal knowledge or training while others are very familiar with these types of change efforts. Organizations with more experience may find this brief helpful in strengthening or expanding their work by reflecting on previous activities and learning some new tips.[2]

This brief pulls on multiple sources, such as peer-reviewed scholarly articles and books, white papers, toolkits, and policy documents, to provide a basic understanding of policy and systems change, and outline the building blocks on how to plan and execute these kinds of change. Relevant examples from the local context are provided to further support understanding of the concepts. Resources are also provided at the end of both the policy and systems sections.

Introduction to FCSS research brief

This research brief is one of a series provided for FCSS-funded organizations and others in the field of preventive social services focused on enhancing social inclusion. It provides research-based information on policy development and change, as well as systems change.

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1.1 The importance of policy dialogue and systems change[2]

For non-profit organizations, public policy dialogue and systems change is generally about speaking on behalf of the people they serve and gaining support to help carry out the organization's goals and mission. This work generally involves speaking out about rights or benefits that someone or a group is entitled to or taking action to help ensure that public institutions function in the way they are supposed to. At the same time, change efforts can also involve broader activities aimed at changing an organization or an entire system.

There are important reasons for non-profit organizations to engage in policy and

systems change efforts. First, the mission statements of many non-profit organizations highlight the goal of social justice.[3] Giving voice to inadequately represented members of the community is a key component of the non-profit sector.[4] Not only do non-profit organizations provide pathways for participation, they bring a collective experience that goes beyond what individuals alone might bring to the change efforts.[4] Also, by bringing in more, and different, voices to inform, guide, and shape social issues, non-profit organizations can shift and improve the ideological balance.[3]

With the introduction and assent of Bill C-86, organizations can now engage in unlimited public policy dialogue and development activities, **so long as these activities further their charitable purpose(s) and do not involve the direct or indirect support of, or opposition to, any political party or candidate for public office.**[5]

~ International Centre for Policy Advocacy

Shifting guidelines for organizations

In the past, non-profit organizations may have avoided public policy activities due to perceived limitations within Canadian charity law.[3]

In January 2019, The Canada Revenue Agency (CRA) issued new guidelines on "Public Policy Dialogue and Development Activities," also known informally as PPDDAs.[6] These guidelines replaced the previous guidelines on "political activities." The new guideline clearly states:

As long as a charity's PPDDAs are carried out in furtherance of its stated charitable purpose(s), the *Income Tax Act* places no limits on the amount of PPDDAs a charity can engage in. In this context, a charity may devote up to 100 per cent of its total resources to PPDDAs that further its stated charitable purpose. (CRA, 2019)[7]

To summarize, as long as the public policy and systems change work a non-profit organization does is in furtherance of its charitable purpose, there are no longer any government-imposed limits on how much of this work an organization can do.[6]

For more information, the Calgary Chamber of Voluntary Organizations has several resources that can be found here.

Part 2 – Policy change

2.1 What is policy?

Although the term policy might be an abstract notion, the reality is that policies affect our behaviour on a daily basis, whether formally through laws or informally through social norms and expectations.[8] They say what is to be done, who is to do it, how it is to be done and for (or to) whom it is to be done.[9]

Policy can occur at various levels and points of interaction — personal, organizational and public. Formalized policies help guide the operationalization of values, beliefs and missions of a variety of societal entities.

Organizational policy guides how organizations operate and how employees should understand their roles and outlines their behaviours during working hours. Unlike public policy, which often has opportunities for public input, organizational policies are often made out of public view. Some examples of non-profit organizational policies are:

• Codes of conduct

• Workplace safety policy

• Parental/family leave

• Privacy policy

• Anti-discrimination policy

• Anti-harassment policy

• Volunteer screening policy

• Accessibility for persons with disabilities policy

• Fee for service policy

• Social media policy

Public policy generally refers to the actions or specific set of actions by the administrative or executive branch(es) of government.[10] Public policies are situated in the context of public interest issues, and are framed within constitutions, legislative acts or laws, and institutional customs. Examples of public policy actions include:

• Legislative actions

• Regulatory decisions

• Judicial decisions

• Funding priorities

• Mandates or strategic directions

Often these policies contribute in a positive manner to people's lives, such as social policies (e.g. child benefits, Old Age Security), health-related policies (e.g. health-care access, quality of care) and systems of care policies (e.g. child intervention, elder care). These policies are foundational and are meant to meet the needs and rights of its citizens. These foundations include:[11]

• **Equality:** Achieving equality underlies social policies. The redistribution of resources contributes to achieving equality because it can facilitate equal opportunity and equal outcome for groups, regardless of sex, gender, ethnicity, race, ability, age, income, etc.

• **Need:** Policies enforce the distribution of basic needs that people require to survive like food, water, housing, etc.

• **Freedom and rights:** There are different types of rights that policies are meant to ensure such as civil rights, social rights, the right to security and welfare, political rights, etc.

Public policies are developed and changed over time. Often the impetus for change is that basic needs are not being met or that current policies or laws are not effective.[9]

Sometimes the public policy we want to develop and change is relatively straightforward, like whether to add traffic lights at a busy intersection near an elementary school. Other times, however, the public policy issues are much more complex. Healthcare, education, economic development, or domestic and sexual violence are issues that require the involvement, actions and commitment of many systems and stakeholders, often including the public.[2,10]

Many of the complex issues that individuals face in today's society involve social policies. Social policy is the specific part of public policy that has to do with social issues. It describes the set of values, programs and practices related to what a society should look like. Ultimately, social policy is about meeting human needs, like housing, employment, nurturing, safety and security, and childcare.

Within Canada, public policy making generally follows an established process,

> **Policy is a plan, course of action, or set of regulations adopted by a government, business, or/and institution, designed to influence and determine decisions or procedures (FCSSAA Advocacy Manual, pg. 5).[2]**

whether it be at the municipal, provincial or federal level.[12] Each has a system involving elected officials, committees, research and preparation and public input that varies with the level of government and the particular jurisdiction.[10] Typically, policy is set and carried out by the following four actors:

A group of organizations wants to see more sexual well-being supports and services available across the province. They may work with individuals, sectors and systems (like the health system) to advance the development and implementation of a provincial framework for sexual health and well-being. The developed framework is a policy agenda tool, setting direction for the government and other involved stakeholders.

- **Executive branch of government.** This includes city councillors and provincial and federal cabinet members. These are the individuals that are elected to be members of government.

- **Administrative branch of government.** These are the government employees, as opposed to elected officials, who play a key role in policy development and implementation.

- **Regulatory agencies.** Regulatory agencies, such as Health Canada and Alberta Liquor, Gaming and Cannabis, carry out public policy – these agencies evaluate, approve, and regulate products and actions to help protect individuals' health and safety.

- **Courts.** Both the Supreme Court of Canada and Court of Queen's Bench (Provincial) are engaged in setting and implementing public policy.

Input in public policy comes from government staff, elected officials, as well as from citizens, communities, businesses, and non-profit organizations.[9] Non-profit organizations influence policy decisions, both through formal and informal policy work as well as through the delivery of their services. Non-profit organizations affect various stages of the policy process, such as problem definition and policy agenda setting through both policy-related work and service delivery efforts.[4]

2.2 Policy change – why, who and how?

Why change policy?

Since public policy is concerned with the way societies – government, institutions, systems, civil society, and communities – meet human needs for security, health and well-being, non-profit organizations are often familiar with the exact social and other policy dimensions that impact the lives of the people they serve. In the midst of providing services and interventions to individuals, families and communities, many non-profit organizations may become aware of the unequal application, opportunity and/or benefit of a public policy to a particular segment of the population. They may recognize that certain policies may not address the precarity, vulnerability or marginalization that certain individuals or groups may experience, and may even exacerbate them.

Non-profit organizations have a unique role to play in public policy change because of their rootedness in community and individual experiences.

Policy advocacy includes other approaches less visible than media campaigning and public activism.

~ International Centre for Policy Advocacy

According to the Ontario Nonprofit Network, these roles are to:

- **Increase awareness.** Increase the awareness and understanding of community challenges and opportunities and government actions.

- **Listen to patterns.** Identify issues and opportunities across communities and regions.

- **Convene.** Connect people and groups to create opportunities in communities.

- **Build capacity.** Share the knowledge and research non-profits already have.

- **Demand accountability.** Hold governments and decision-makers accountable.

- **Strengthen voices.** Build confidence to speak up and say what communities care about.

Non-profit organizations may become aware of how the organizational policies of other organizations may be negatively impacting the clients they serve. They may also become aware, because of shifting social, economic, political and cultural dimensions in society that their own policies are not serving their clients in a positive way or in a way that contributes to their progress and well-being. Staying vigilant to the ways policies are impacting people provides non-profit organizations the opportunity to facilitate policy change.

Reflection question
Has your organization done its own internal policy development and change to reflect today's cultural, social and economic realities?

Approaches to policy change

There are several ways to influence policy change; what approach fits best depends on the type of policy that is targeted, the audience (both influencers and decision-makers) and the type of change that is desired.

There are three main ways to influence policy change:

Policy influence through public awareness – Efforts to influence the public through a campaign to galvanize public or external pressure on decision-makers.[13]

Policy research/advising – Efforts to influence policy through investigating a policy question or impact on a particular population through empirical research, with the intention to assist in policy decisions.[14]

Policy advocacy – The process of negotiating and mediating a dialogue through which influential networks, opinion leaders, and, ultimately, decision-makers take ownership of proposed ideas, evidence, and proposals, and subsequently act upon them.[13]

Often, an organization will use multiple approaches, but the main consideration is that they should adopt approaches that fit their capacities.[13] Here are some questions to ask of an organization's readiness to do policy change work:

• What type of organization are we?

• What are our strengths that would support our policy change work?

• Have we done policy change work before? What were those approaches? Did they work?

• How could we adjust these approaches to maximize our influence?

Core conditions for policy change

At the heart of influencing policy is a set of core conditions. They are:

• **A strategy to affect policy change or action** – Policy change requires a structured and sequenced plan of action with the purpose to start, direct or prevent a specific policy development and/or change.

• **A primary audience of decision-makers** – The ultimate target of any policy change effort is to influence those who are in positions of decision-making. In some cases, the effort is directed to these people; in other cases, the work focuses on secondary audiences (for example, their advisors, the media, the public).

• **A deliberate process of persuasive communication** – In all activities and communication tools, the goal is to get the target audiences to understand, be convinced and take ownership of the ideas presented. Ultimately, they should feel the urgency to take action based on the arguments presented.

• **A process that normally requires the building of momentum and support behind the proposed policy idea or recommendation.** Making change in public policy is usually a relatively slow process as changing attitudes and positions require ongoing engagement, discussion, argument and negotiation.

Steps to change policy

At the end of this section, a list of policy change resources offers a wide variety of tools, workbooks and approaches to policy change. At the most foundational level, efforts should follow four basic steps (see Figure 1 below):

1. **Identify the issue and the policy**

2. **Frame the policy change**

3. **Plan the policy change**
   a. **Theoretical foundations**
   b. **Target audience and activities**

4. **Evaluate and renew the policy change initiative**

Within each of these steps are a number of considerations that should be explored. The remainder of this section will focus on each of the steps in detail, outlining specific reflection questions to help non-profit organizations think about their work.

Step 1 – Identify the issue and the policy

Non-profit organizations have a level of awareness and knowledge of the issues people face because of their close proximity to the daily lives of these individuals. These organizations observe the intricacies and complexities that people experience, often requiring a sort of intervention that is different from programmatic responses. Non-profit organizations have the benefit of gathering the first-hand experiences of the individuals they serve in an effort to help inform policy, research and advance progressive changes to social issues.

At its foundation, this step asks:

• What is the issue that needs to be addressed?

• Why is it important and to whom? What are multiple stakeholders saying/observing about this issue?

• Does the issue have a policy dimension? What systems are involved?

• What does the research say about the issue and policy dimensions? (One source of information on this is the other FCSS research briefs).

• What current policies reinforce the issue?

These questions can be answered through primary research, the experiences of individuals, families and/or communities, and the work human service organizations do with clients.

Figure 1. Steps to policy change

Step 1
Identify the issue and policy

Step 2 and 3
Frame and plan the policy change

Step 4
Evaluate and renew
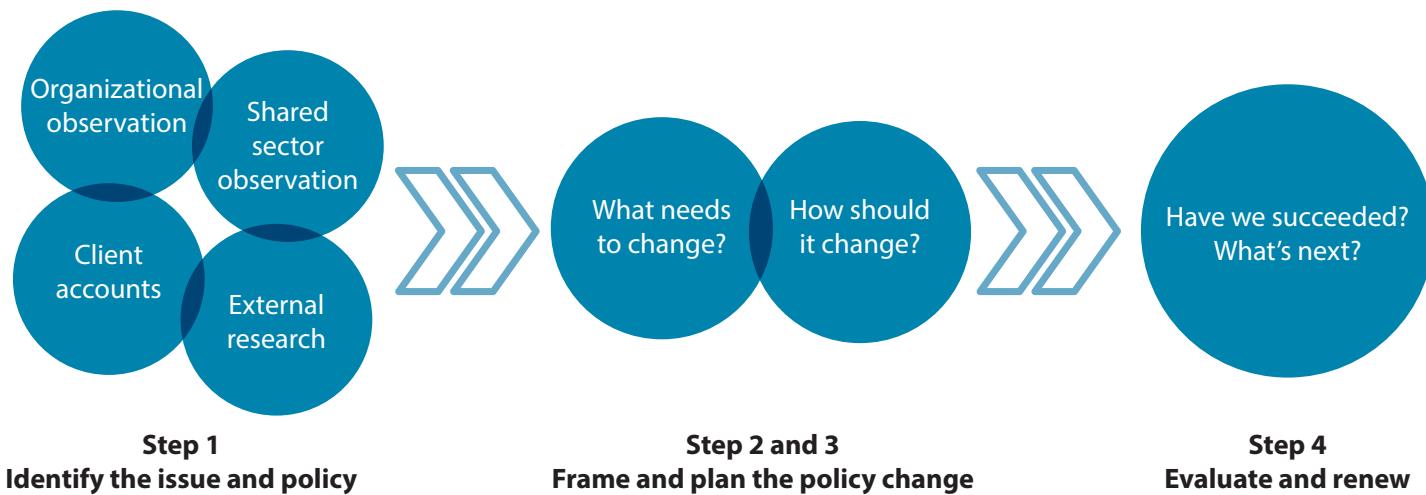
Policy and systems change

Some non-profit organizations may conduct their own research to better understand the social issues that face their clients, not only to increase their own organizational knowledge and capacity, but to gather data to help inform other organizations, the larger sector and/or system. This evidence can also be useful in changing policies that are contributing to the challenges their clients are facing. Types of research that are used by non-profit organizations include:[15]

- Focused synthesis/review of existing research – The selective review of written materials and existing research findings relevant to a particular research question. (For example, the other FCSS research briefs.)

- Secondary analysis – Examining data from existing databases using descriptive or inferential statistics.

- Qualitative methods – Collection and analysis of non-numerical data including interviews, focus groups, participant observation, surveys and case studies.

- Cost-benefit analysis – Comparison of monetary, social, environmental, and other costs and benefits of program or policy options.

Step 2
Frame the policy change

After identifying the challenging policy issue, it is important to frame the policy change information in a way that clarifies the issue, who it affects and why the change is required. This can inform decision-making around the options, strategy and recommendations that move from issue identification to policy change recommendations.

Questions to guide this step:

- What positive change can be expected if the policy change is successful?

- Who will be the primary beneficiaries of the policy change?

- What changes in policies could lead to improvement?

- Who is responsible for those policies?

Writing a briefing note can help organize all of the information and set-up the planning efforts to influence policy change. Typically, a briefing note includes the following information:[16]

Title: A good title quickly communicates the contents of the brief in a memorable way.

Executive summary: This section is often one to two paragraphs long; it includes an overview of the issue and the proposed policy action.

Context or scope of issue: This section communicates the importance of the issue and aims to convince the reader of the necessity of policy action.

Policy alternatives: This section discusses the current policy approach and explains proposed options. It should be fair and accurate while convincing the reader why the policy action proposed in the brief is the most desirable.

Policy recommendations: This section contains the most detailed explanation of the concrete steps to be taken to address the policy issue.

Appendices: If some readers might need further support in order to accept the argument but doing so in the brief itself might derail the conversation for other readers; the extra information can be included in an appendix.

Consulted or recommended sources: These should be reliable sources that are used throughout the brief to guide the policy discussion and recommendations.

Briefing notes can also assist in identifying the roles that organizations can play (e.g. leader, supporter), potential collaborators, and resource and skill requirements. Regardless of intent or outcome, briefing notes are useful communication and issue-raising tools to gather support in the sector and/or community.

Step 3
Plan the policy change efforts

Policy change requires a planned change process, with the end goal of recommending the development of new policies because none exist or advocating for the change of existing inadequate or problematic ones. There are several approaches that non-profits can take, ranging from raising the awareness of the public on a particular policy issue to conducting policy research and analysis and presenting the findings and solutions to decision-makers.

Identify theoretical approaches

It is helpful in a policy change initiative for non-profit organizations to identify the theoretical foundations that will support their policy change goals, similar to what is found in programmatic frameworks such as logic models and theories of change. Many research-based theories about the policy process and policy actors can form the conceptual underpinning of how policy advocacy can affect change. These theories can come from diverse disciplines as political science, sociology, psychology, social psychology or communications.

Community-based research: Greater community participation in research

Non-profit organizations are often asked by research institutes and academia to take part in research on specific social issues. These organizations may also increase their own resources and capacity to conduct their own research to be able to join in collaborative policy agenda efforts or to influence legislative or programmatic policies of larger institutions or systems. Community-based research (CBR) bridges the gap between research that happens "elsewhere" with the experiences of front-line service providers and the people they serve. Community-based research is:

"A research approach that involves active participation of stakeholders, those whose lives are affected by the issue that is being studied, in all phases of research for the purpose of producing useful results to make positive changes."

It is community-driven, participatory and action-oriented. The latter is a key function of community-based research: an important benefit of CBR is that the process and results are useful to community members, including organizations, in making positive social change and promote social equity.

Policy and systems change

This resource, by the Centre for Evaluation Innovation, outlines 10 theories of change that are relevant to policy change.[17] They are:

Five global theories that explain how policy change occurs more broadly:

1. "Large Leaps" or Punctuated Equilibrium theory
2. "Policy Windows" or Agenda-Setting theory
3. "Coalition" theory or Advocacy Coalition Framework
4. "Power Politics" or Power Elites theory
5. "Regime" Theory

Five tactical theories from various social science disciplines that apply to common policy change tactics that are likely a part of broader efforts or campaigns:

1. "Messaging and Frameworks" theory
2. "Media influence" or Agenda-Setting theory
3. "Grassroots" or Community Organizing theory
4. "Group Formation" or Self-Categorization theory
5. "Diffusion" theory or Diffusion of Innovation

Appendix A provides an overview of each of these theories/frameworks in terms of how change happens and in what context it may be best used. For more detail about each of the theories, please find the link in the resource table at the end of this section.

Target audiences and intended changes

After some consideration of intent, theoretical approach and organizational will and capacity, the policy change strategy must identify the target audience, and the intended change. The Advocacy Strategy Framework is one approach among many that offers a framework to help identify policy influence strategies based on the

Figure 2. The Advocacy Strategy Framework[i]
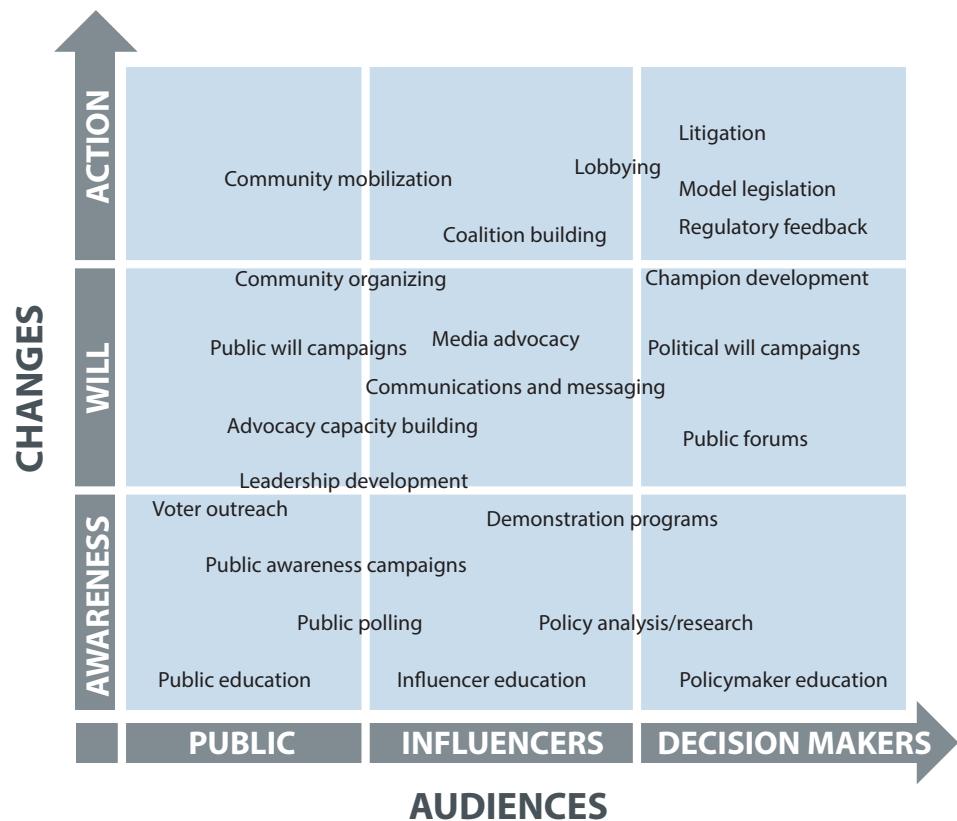
target audience and intended change. The framework outlines three general changes (awareness, will and action) as well as three general audiences (public, influencers and decision-makers).[18]

On the horizontal axis of the framework are Audiences. These are the individuals and groups that policy strategies target and attempt to influence or persuade. They represent the main actors in the policy process and include:

- The public, or segments of it.
- Policy influencers (e.g. media, community leaders, the business community, thought leaders, political advisors and other organizations.

- Decision-makers (e.g. elected officials, administrators, judges, etc.)

The desired **changes** are on the vertical axis and are the activities that progress towards a policy goal. The three points on the continuum differ in terms of how far an audience is expected to engage on a policy issue:

- **Awareness/knowledge** – Make the audience aware that a issue or potential policy solution exists.

- **Will** – Raise an audience's willingness to take action on an issue beyond raising awareness. It tries to convince the audience that the issue is important enough to warrant action and that any actions taken will make a difference.

- **Action** – Policy efforts actually support or facilitate audience action on an issue.

Make sure that the strategy aims to move an audience segment toward action. **Decades of research have shown that just making people more aware of an issue generally is not enough to mobilize them to act.**[18]

EXAMPLE AUDIENCES		
Public	**Influencers**	**Decision makers**
Parents of school-aged children	Trade associations	Members of Parliament
Seniors 65 and older	Business community	School Board members
Millennials	Labour/Unions	City Council members
Immigrants	Teachers	Non-profit administrators
Voters	Donors/Foundations	Superintendents

Who else is working on this and how?

Policy change efforts often feature multiple voices working on the same issue – aligned or in opposition. When potential partners are identified, this can create a powerful network of like-minded non-profit organizations and groups who can bring more resources, messaging and movement to the change effort. **Collaboration and interorganizational partnerships are critical to successful policy change efforts.**[1] **By working with others, it allows non-profit organizations to leverage a wider range of expertise and resources to inform change.**[19–21]

Mapping existing efforts and non-profits that are engaged in similar work can answer questions such as:

• How are advocates complementing one another?

• Are there opportunities to coordinate or collaborate?

• Is there unnecessary duplication of effort?

• Are strategies unintentionally working in opposition?

The impact of collaboration on policy change – The National Housing Collaborative[22]

The National Housing Collaborative, an alliance of non-profit organizations, private housing associations and major philanthropic organizations, came together to influence the 2015 Government of Canada's National Housing Strategy. This strategy signified a commitment by the federal government to take a leadership goal in housing policy. With the federal attention on housing policy, and embedded national consultation led by the Calgary Mortgage and Housing Company on the National Housing Strategy, a group of housing organizations in the Greater Toronto Area (GTA) who had already been working together for a few years on housing solutions for the GTA asked that a similar network be built on a national scale to influence the national housing strategy. The Collaborative had a unique focus:

"Bringing together a variety of housing perspectives for a specified period of time to rigorously explore a limited range of policy ideas. The Collaborative provides a neutral platform and administrative and research support that would enable partners representing the range of the housing spectrum to move beyond the status quo (page 2)."

Through research and consultation, the Collaborative created policy recommendations and advocacy strategies. The work, which was implemented with quick timelines, contributed to key successes such as strengthening the relationships between the partners and government, increased individual and sector knowledge and capacity, commissioned research from subject-matter experts, and it produced "solid recommendations that were clearly heard by government" as evidenced by the incorporation of much of the Collaborative's work into the National Housing Strategy, including one of the most innovative housing tools, The Canada Housing Benefit. As it was stated, the collaboration approach was successful because of *"consummate quality and depth of policy research paired with broad-based support from a diverse set of stakeholders which proved a winning combination"* (p. 15).

More information and tactics on policy effort collaboration can be found in the resource list at the end of this section.

Step 4
Evaluate and renew policy change efforts

Regular and objective evaluations of progress towards policy change goals will help to recognize accomplishments, motivate partners, and ensure progress towards policy change goals. Evaluations should explore what is working, what is not, what has been accomplished, and what needs to be done yet.[2]

Many advocates use long-term goals, such as an improved foster care system, a new immigration policy, as their only benchmark of success.[23] The problem with this approach, however, is that it only reveals whether an end goal has been achieved or not; it contributes little to the advocacy campaign as it unfolds.[24] In a study conducted by Innovation Network Inc. regarding the kinds of interim measures advocates track to measure progress, seven different areas were identified.[23] These included:

• Measures around building the base (e.g. increase in number of partners or allies, increased number of inquiries, number of target populations reached through communications, etc.).

• Measures around decision-maker support (e.g. increased engagement of decision-makers, increased access to decision-makers, number and quality of meetings with decision-makers, etc.).

• Measures around infrastructure or position within issue movement (e.g. increased funding, decreasing staff turnover, growth of organization reputation or recognition of contribution to the issue, etc.).

• Measures around communication (e.g. increased media coverage, number of materials distributed, etc.).

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- Measures around windows of opportunity (e.g. increased campaign momentum, changes in support and understanding of the issue).

- Measures around campaign sustainability or strength (e.g. number of leaders developed, increased diversity of organizations in campaign, etc.).

- Interim measures tied to legislative victory (e.g. better condition for target population, campaign, policy or legislative victory, etc.).

Different monitoring methods should be chosen based on the indicators selected to evaluate the outcomes and impact of the advocacy efforts. There are several different points to consider before deciding on any one monitoring method. For example, what level of rigour is needed with data collection? When will data be collected? What types of questions will the data address?[25] Examples of monitoring methods include:

- Keeping records of meetings, correspondence or conversations with target audiences and the responses elicited.

- Tracking when key messages or briefing notes are used by elected officials, other key influencers or the media.

- Carrying out surveys and interviews to determine the impact your actions have had and the recognition they have received.

- Monitoring the media and keeping track of coverage of your topic in the media.

Using Racial Equity Impact Assessments (REIA) in evaluating policy change

REIAs are effective tools to understand the impact that policy and policy change has on different racial and ethnic groups. As a planning and evaluation tool, it can identify, reduce and prevent racial discrimination and inequities in policy environments (as well as in programs, plans and budgetary decisions). Application of the REIA in several jurisdictions has elicited the promotion of equity in key policies, programs and funding decisions. For more information, the resource can be found in the resource list at the end of this section.

Conclusion

As this section highlights, non-profit organizations have an important role to play in informing, shaping and carrying out public policy change efforts. Having an understanding of the policy development and change process is an important first step in readying organizations to engage in public policy change efforts.

In addition to identifying strategies and tactics to pursue policy change, identifying the underlying assumptions and beliefs about how change can progress to achieve policy goals is an essential component of this work. Clarifying the policy change goals and planning logical activities will provide a strong foundation. Evaluation and monitoring of policy change efforts is a critical aspect of identifying the progress made towards advocacy goals, as well as helping to recognize accomplishments, motivate partners and identify the need for renewed policy change efforts.

Below are some further resources to assist with policy change efforts.

Table 1. Policy resources

Area	Link to resource
General overview and policy change planning	Supporting the policy-making process[26]
	Advocacy Toolkit: A guide for nonprofits to meaningfully engage your community – Ontario Nonprofit Network[27]
	Policy Advocacy Tools: Calgary Chamber of Voluntary Organizations[28]
	Advocacy strategies and approaches: Overview – Association for Progressive Communications[29]
	Thought about food? A workbook for food security and influencing policy[9]
	Collaboration on Policy: A Manual developed by the Community-Government Collaboration on Policy[30]
	National Housing Collaborative: Reflections and Analysis of a Process[22]
	Pathways for Change: 10 Theories to inform advocacy and policy change efforts[17]
Research and analysis	Tools for Policy Impact: A tool for Researchers[14]
	Making research matter: A guide to policy advocacy in transitioning countries[13]
	An Essential Guide To Writing Policy Briefs[31]
	Racial Equity Impact Assessment[32]
Evaluation and monitoring	Public Health Agency of Canada's Innovation Strategy Projects[33]
	Evaluation Public Policy Advocacy[34]
	A practical guide to advocacy evaluation[35]
	Centers for Disease Control: Evaluating policy impact[36]

Part 3 – Systems change

3.1 What is a system?

Imagine an issue that clients in non-profit organizations are facing. Is it unemployment? Is it racism? Is it housing stability and/or affordability? Is it settlement and integration? Is it violence and abuse? Could it be a combination of any of these? When trying to conceive of a solution or a way to intervene, it is easy to get inundated with complexity, ideas and directions. This is because the issues that people face are often a result of a complex system of interdependent and interactive conditions.

There are many definitions of "systems" that can be found in the literature.[37] This brief uses the following definition:

A system is a configuration of interaction, interdependent parts that are connected through a web of relationships, forming a whole that is greater than the sum of its parts.

Systems are all around us. They are comprised of multiple components, some of which are tangible (like people, resources and services) while others are intangible (like values, relationships and perceptions).[37] Systems are embedded and interconnected within larger systems.[38] For this reason, social systems are often complex and difficult to influence.

The complexity of social systems means that the resources available to any single entity to deal with complex social problems are fairly limited. This is why over the past decade many non-profit organizations have engaged in systems change efforts.[39]

> **For systems change to occur, multiple organizations must coordinate individual change efforts, with a focus on achieving broader, macro-level changes.[37]**

Organizations increasingly realize that change efforts in social systems require significant adjustments; not just to one organization, but rather to a range of relationships, practices and policies that span organizations.[40] Examples of systems that are the focus of change efforts include the education system, the child welfare system, a human service delivery network, etc.

3.2 What is systems change?

Human service and community systems rarely take the form of a single unified organization that can be influenced or changed, but are composed of many interconnected systems and sub-systems, each with their own bounded culture, structures, objectives and missions. Sometimes, these sub-systems are not directly connected, and connections can be formal or informal. Systems are often bounded by a variety of conditions that can be independently defined, measured and targeted for change.[41]

For complex systems to change, influence should be made in all or several of the conditions included in the triangular diagram above. Even changes at the first level – the explicit structural changes – are essential to people's experiences.

"Both mental models and policy change are vital — as are all levels of structure; indeed, the only reliable way to know that shifts in mental models are in fact occurring is to see shifts in the other conditions. For example, what people say their assumptions are can differ from their assumptions in action. Said another way, we can only infer shifts in mental models through, for example, seeing the consequences of such shifts on things that are more visible, like policies, practices and resource flows. (p.5)"

Figure 3. Six conditions of systems change[ii]
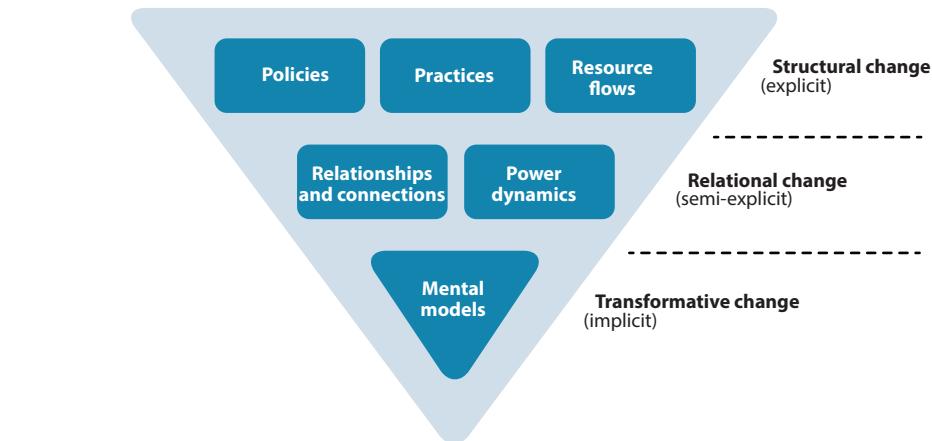
Systems change conditions – Definitions

Policies: Government, institutional and organization rules, regulations and priorities that guide the entity's own and others' actions.

Practices: Espoused activities of institutions, coalitions, networks and other entities targeted to improving social and environmental progress. Also, within the entity, the procedures, guidelines or informal shared habits that comprise their work.

Resource flows: How money, people, knowledge, and information and other assets such as infrastructure are allocated and distributed.

Relationships and connections: Quality of connections and communication occurring among actors in the system, especially among those with differing histories and viewpoints.

Power dynamics: The distribution of decision-making power, authority and both formal and informal influence among individuals and organizations.

Mental models: Habits of thought—deeply held beliefs and assumptions and taken-for-granted ways of operating that influence how we think, what we do and how we talk.

[ii] *This visual and definitions are sourced "The Water of Systems Change" (2018) by FSG and licensed through Creative Commons.* https://www.fsg.org/publications/water_of_systems_change

Elements of systems change

While there is no single approach to systems change, there are a number of common elements that contribute to successful change efforts.[37–39] These include:

- **Use a systems mindset.**[38,39,42] In order to engage in systems change, approaching challenges with a systems lens is a required prerequisite.[38,42] This means seeing interrelationships and processes of change in order to understand the deeper mechanisms at play.[43]

- **Understand current trends and momentum in the system.**[38,44] In order to create change, an understanding of where readiness exists and what others are doing in this area is critical.[44]

- **Research and data are key to systems change strategy development.**[8,39] Understanding what others have tried in the past prevents redundancies of effort and "reinventing" the wheel.

- **Create connections and engage multiple actors.**[37,39,44–46] A single organization cannot create systems change. Rather, contributions from multiple actors who are both connected and disconnected from each other needs to be harnessed. Partnerships, collaborations, coalitions and networks are just some of the hallmarks of systems change efforts.

- **Learn and evaluate.**[37,39] The most successful systems change efforts engage in consistent data assessments, and use the data as a feedback loop to inform strategy.

Planning for systems change

Engaging in good planning prior to beginning systems change work is critical to the success of any change effort.[37] Planning for systems change involves:

- Identifying the root causes of problems.

- Identifying the key actors.

- Finding the points of leverage.

- Helping define the system and establish its boundaries.

- Establishing what can be controlled, and what can be influenced.

- Clarifying the objectives of taking action.

Mapping out the problem and current response can tell a story of why there needs to be change.
~ Diana Barran, Safelives

These goals are not only relevant during the planning stages of systems change, they are also important throughout the process.[37] When implementing systems change it's important to:

- Work with others — build movements, consortia, networks, to amplify collective efforts.

- Avoid getting bogged down in the complexity of systems.

- Act on points of leverage where there is a realistic prospect of changing the system.

Importance of leverage points

Leverage points are those places in a complex system where a small shift in one thing can produce big changes throughout the system.[47] Leverage points provide opportunities for varying levels of change, as there are shallow leverage points and deep leverage points.[48] **Shallow leverage points** are those that are relatively easy to adopt and implement, but have minimal effect on changing the system as a whole. For example, gendered income differences may result in the development of programmatic interventions to address the visible gap, such as income-generating programs for women.[48] These visible gaps however, are often symptomatic and point to deeper dynamics within the system. **Deep leverage points** are those that are much harder to address, but typically have high impact.[47,48] These include things like values, social norms, worldviews, etc.

Multiple methods exist to identify leverage points in a system, such as:[49]

- Systems mapping – a process for visualizing and analyzing the factors that make up the system. Data is gathered from a wide range of stakeholders and detailed diagrams are developed.

- Rapid systems mapping – generally developed through seeded discussions and expertise at hand.

- Design thinking – a process that moves from ideation to prototyping.

Systems change in Alberta: Development of the Natural Supports Practice Framework

An example that highlights the elements of system change conditions is the 2017 Working with Vulnerable Youth to Enhance Their Natural Support: A Practice Framework developed by The Change Collective. It is a good example of systems change that involved addressing mental models, relationships and connections, and practice changes.

Increasingly, youth serving organizations and funders realized that professional supports, while important, are not sustainable. As a result of this awareness, The Change Collective came together in 2017 to develop their collective capacity to enhance the natural support networks of vulnerable youth.[3] Comprised of representatives from 13 youth-and-family serving organizations, this group sought to shift the collective response to working with vulnerable youth (particularly those transitioning to adulthood).

By working to shift their mental models about what vulnerable youth need and how to support them, building and strengthening cross-sector connections and communication, and supporting changes in practice with development of a framework that all youth-serving practitioners can use, The Change Collective has seeded critical areas of system change conditions.

Three years after the framework has been released, an increasing number of organizations are incorporating it into their ongoing operations, even beyond those that serve vulnerable youth. Funders have also shifted their practices to support organizations in adopting this framework into their practices. As more organizations shift their practices, we will start to see greater ripples of change across the sector.

[3] *See* http://www.burnsfund.com/research-publications/working-with-vulnerable-youth-to-enhance-their-natural-supports/

In focus: Systems thinking and race: How a systems approach to change can shift structural racism

In June 2011, john a. powell and Connie Cagampang Heller provided a series of workshops with funding from The California Endowment. This training for non-profit organizations provided information and activities that furthered their understanding on how race is a complex social construct that is assigned value and meaning and has concrete ramifications on people's lives.

As the authors state:

Racism manifests itself in multiple spheres of our lives and takes many forms, including internalized, interpersonal, institutional and structural. In most conversations, people think about racism as a problem between two or more individuals. From a systems perspective, different facets of racism work interactively to reinforce a system that racializes outcomes. In other words, interactions between individuals are shaped by and reflect underlying and often hidden structures that shape biases, create disparate outcomes even in the absence of racist actors or racist intentions. The presence of structural racialization is evidenced by consistent differences in outcomes, whether you are looking at education attainment, family wealth, or life span, that correlate with the race of the community.

They provide a visual representation of the systems perspective on how structural racism works in society.

Each level of the system has its own impact on individuals or groups and influences their day-to-day health, well-being, economic and social experiences. Together, they work in an inter-related structure that can determine different types of opportunities for racialized individuals and groups. "A structural analysis is a powerful tool that can be used to examine how historical legacies, individuals, institutions and structures work interactively as a system to distribute advantages and disadvantages along racial lines (page 6)." A systems change approach would work at each level, identifying the leverage points an interventions that could shift the system in ways that would reverberate throughout it. The link to this resource is found in the resource section below.

Systems thinking: Putting it into practice

Systems thinking is a disciplined approach for examining problems more completely and accurately. It asks big questions about the causes and structures that operate a certain human condition. It moves from observing data to surfacing patterns in order to understand and change these structures to serve people better.

A tool by FSG called Systems Thinking Toolkit, provides a Systems Tools Matrix that helps understand an issue and its system, and assists action-planning to shift them. These tools include: Action Mapping, Appreciative Inquiry, Ecocycle Mapping, Timeline Mapping, Trend Mapping and World Café Method. The link for this tool is found in the resource section below.

Structural: Dynamic, cumulative among institutions, durable

Institutional: Bias in policies and practices in a school, agency, etc.

Interpersonal: Bigotry and implicit bias between individuals

Internalized: Beliefs within individuals, including stereotype threat
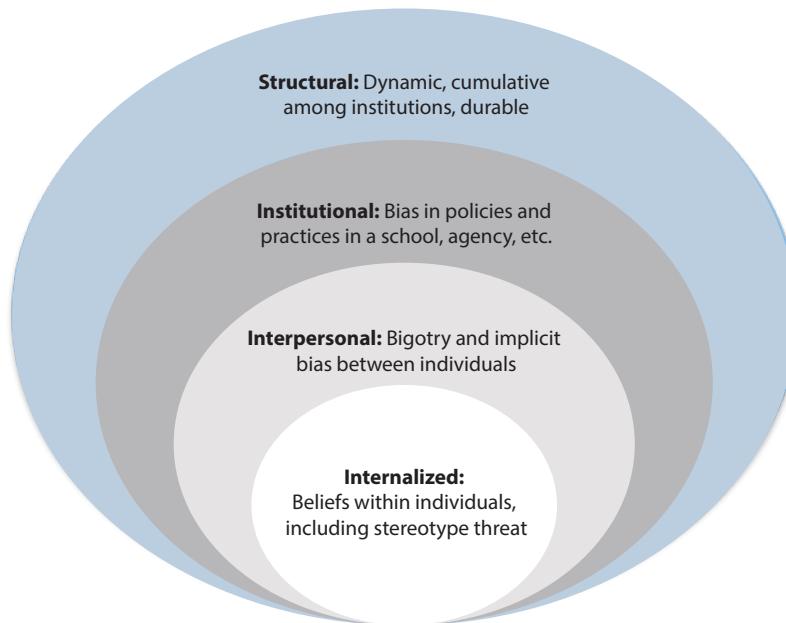
Conclusion

Many of our 21st century problems require solutions that take into account interdependent and interactive systems conditions. Systems-level solutions hold significant potential for meaningful social change and require practitioners and organizations to engage in systems thinking about problems and solutions.

For these reasons, systems approaches are time and resource intensive. Changing the way a system operates requires vision, persistence, and in some cases "luck" (pg. 37).[37]

It is also important to note that systems change does not need to be big in order to create meaningful impact.[50] Breaking big visions down into more targeted systems change efforts is often more effective because they are smaller in scope, articulate more specific areas of change and provide a clear sense of focus.

Finally, it is important to recognize that flexibility is critical to engaging in systems change work – inflexibility is inevitably at odds with systems change.[37] Reflecting, learning and adapting is the cornerstone of this work.

The table below outlines additional resources to support systems change efforts.

Table 2. System change resources

Area of systems change	Link to resource
General overview	Systems change: A guide to what it is and how to do it[37] Systems Approach Workbook: Change Management Module – Canadian Centre on Substance Abuse[51]
Systems thinking	Systems thinking toolkit: Putting systems thinking into practice in your organization[52] Thinking in systems: A primer[53] Systems Thinking Toolkit[52] Systems Thinking and Race[54]
Leverage points	Leverage points: Places to intervene in a system[47]
System change evaluations	Evaluating System Change: A planning guide – Mathematica Policy Research[55]

Glossary

Developing definitions that are acceptable to everyone is difficult because different people have different ideas about what constitutes systems change, public policy, social change, etc.[8] This brief provides the following working definitions to anchor the building blocks provided throughout the document.

Acts and regulations: These are the two main pieces of legislation in Canada. An Act is a form of written law made directly by elected officials, either in Parliament or a provincial legislature. Regulations are also a form of law. Regulations define the application and enforcement of legislation. Regulations are made under the authority of an Act, called an *Enabling Act*. Acts specify who may make regulations and the scope of the regulation-making authority. Regulations must stay within this scope and, consequently, they are often called "delegated" or "subordinate" legislation. Nevertheless, regulations are law and have the same binding legal effect as Acts.[2]

Advocacy: There are many terms and definitions used to describe activities aimed at influencing government, business or institutional decision-making. Most simply, advocacy is a behaviour and/or process to defend or promote a cause on behalf of the individual, group, organization or community to promote changes in policies, programs, or services.[56] Advocacy can include a wide range of specific actions, such as street protests, social media campaigns, lobbying, etc.[1]

Policy: A plan, course of action, or set of regulations adopted by a government, business or institution designed to influence and determine decisions or procedures.[2] It is important to note that policy can be comprised of both formal and informal actions (and inactions).[8]

Policy change: The development of new policies or changes to existing ones based on the research, feedback and planned activities of individuals or groups.

Policy brief: A concise summary of information that offers objective summaries of relevant research, policy change recommendations and other pertinent information that helps inform policy change efforts.

Social policy: Social policy refers to the part of public policy that has to do with social issues. It describes the vision for a society to meet human needs, such as safety and security, education, work, health, housing and well-being.[57]

Systems: A system is a configuration of interaction, interdependent parts that are connected through a web of relationships, forming a whole that is greater than the sum of its parts.

Systems change: Systems change is a process that involves addressing the root cause of social problems, which are often complex. It aims to bring about lasting change by altering the underlying structures that make the system operate in a certain way.[37]

Appendix A

**From: Pathways for Change: 10 Theories to Inform Advocacy and Policy Change Efforts
(by the Centre for Evaluation Innovation)**[17]

	Theory (key author)	How change happens	When this theory may be useful
Global theories	Large Leaps or Punctuated Equilibrium theory (Baumgartner & Jones)	Like seismic evolutionary shifts, significant changes in policy and institutions can occur when the right conditions are in place.	Large-scale policy change is the primary goal. Organization has strong media-related capacity.
	Policy Windows or Agenda-Setting theory (Kingdon)	Policy can be changed during a window of opportunity when advocates can successfully connect two or more components of the policy process (e.g. the way a problem is defined, the policy solution to the problem and/or the political climate of their issue).	Organization can address multiple streams simultaneously (e.g. problem definition, policy solutions and/or political climate). Organization has internal capacity to create, identify and act on policy windows.
	Coalition Theory or Advocacy Coalition Framework (Sabatier Jenkins-Smith)	Policy change happens through coordinated activity among a range of individuals with the same core policy beliefs.	A sympathetic administration is in office. Organization has a strong group of allies with a common goal.
	Power Politics or Power Elites theory (Mills, Domhoff)	Policy change is made by working directly with those with power to make decisions or influence decision-making.	Organization has one or more key allies in a position of power on the issue. Focus may be on incremental administrative or rule changes.
	Regime Theory (Stone)	Policy change happens through the support and empowerment of policy makers by a close-knit body of influential individuals.	Organization knows or suspect that a coalition of non-politicians is deeply involved in policy making. Organization has access to or can become part of this coalition or regime.
	Theory (key author)	**How change happens**	**When this theory may be useful**
Tactical theories	Messaging and Frameworks or Prospect Theory (Tversky & Kahneman)	Individual's preferences will vary depending on how options are presented.	The issue needs to be redefined as part of a larger campaign or effort. A key focus of the work is on increasing awareness, agreement on problem definition, or salience of an issue.
	Media Influence or Agenda-Setting theory (McCombs & Shaw)	Political issues on the public's agenda will depend on the extent of coverage a given issue receives by mass news media.	Organization has strong media-related capacity. Organization wants to put the issue on the radar of the broader public.
	Grassroots or Community Organizing theory (Alinsky, Biklen)	Policy change is made through collective action by members of the community who work on changing problems affecting their lives.	A distinct group of individuals is directly affected by an issue. Your organization's role in an issue is as a "convener" or "capacity-builder" rather than as a "driver."
	Group Formation or Self-Categorization theory (Turner, Tajfel)	Policy change can be achieved when individuals identify with groups and subsequently act in a way that is consistent with that social group or category membership.	Organization is looking to build or tighten your base of support. Cohesion among your organization's members is a prerequisite for change.
	Diffusion theory or Diffusion of Innovations (Rogers)	Change happens when a new idea for a program or policy is communicated to a critical mass, who perceives it as superseding the current policy/program (or lack thereof) and thus, adopts the idea.	The focus is on a new idea for a program or policy. Organization has trusted messengers and champions to model or communicate the innovation.

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