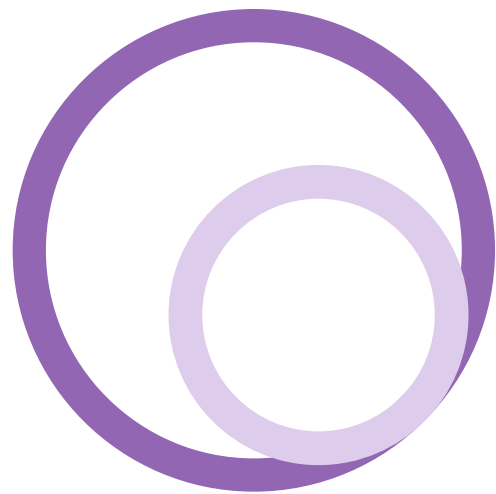# COLLECTIVE STRATEGY

A PLATFORM FOR SOLVING LARGE-SCALE SOCIAL PROBLEMS

Foundation for
INCLUSION
MOVING SOCIETIES FORWARD

To solve the hardest problems in any society, it's not enough to be individually effective.

Changemakers and innovators need to be collectively strategic or their achievements will never add up to ultimate success.

A PLATFORM FOR LARGE-SCALE SUCCESS

The **FOUNDATION FOR INCLUSION** (FFI) is building a global platform to rally, unite, and empower changemakers to solve complex, large-scale social problems.

This brief introduces FFI's Collective Strategy platform:

- **THE METHOD.** The innovation that makes collective strategy possible

- **THE PORTAL.** Strategically important content for farsighted changemakers
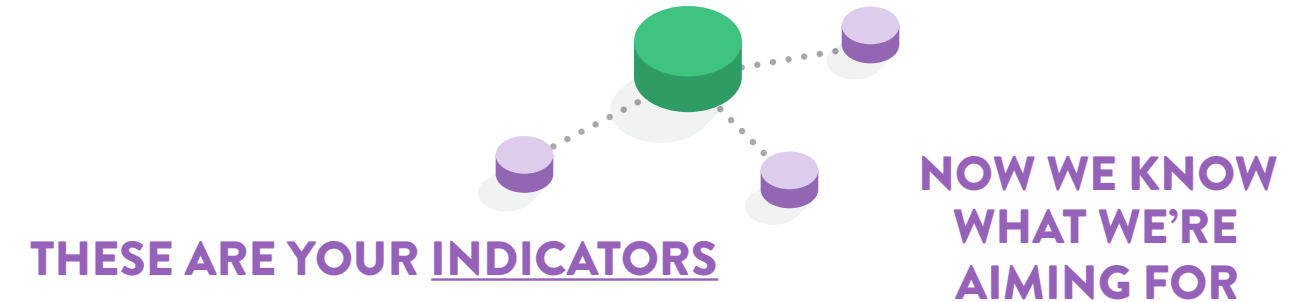
THE METHOD

We've distilled decades of research, experience, and collective wisdom into seven questions and a rigorous, collaborative process for answering them.

This Seven Questions (7Q) method makes it possible to discover what it would take to achieve significant and lasting change on any complex social challenge.
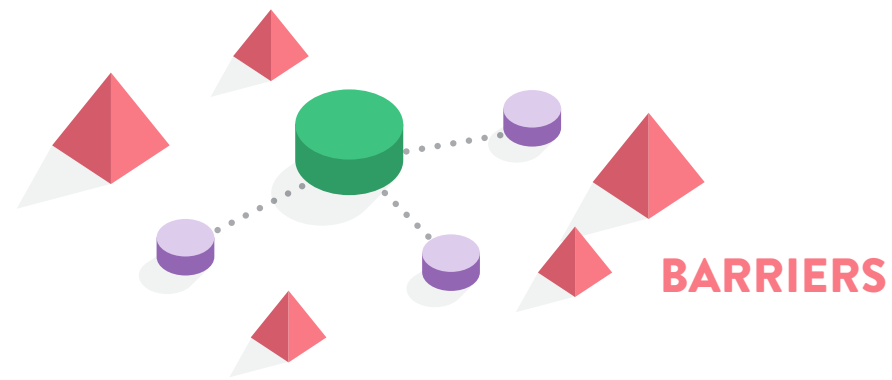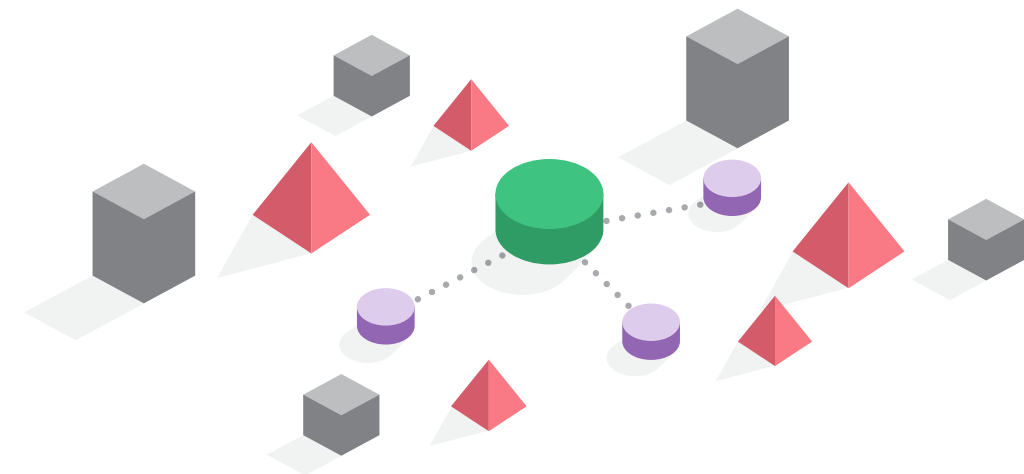
Q1. What are you trying to achieve?

THIS IS YOUR **GOAL**

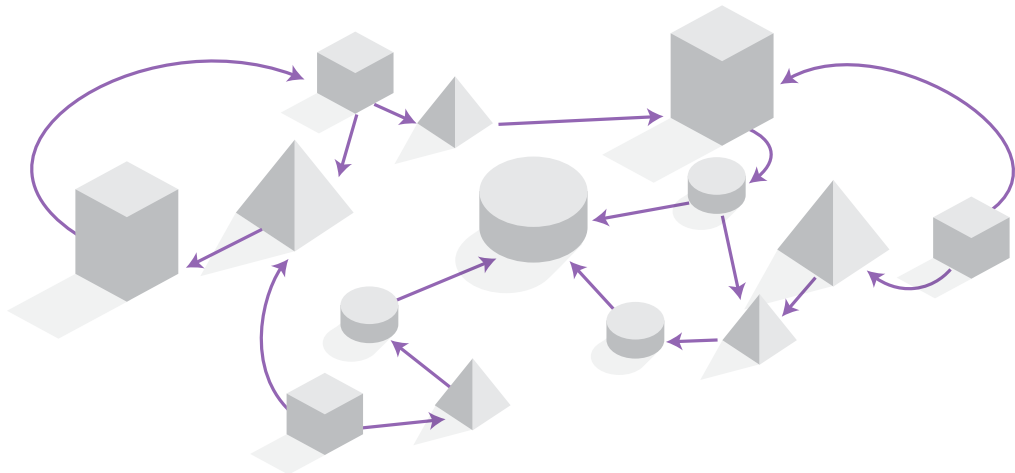# Q2. How will we know it's been achieved?

THESE ARE YOUR **INDICATORS**

NOW WE KNOW WHAT WE'RE AIMING FOR

Q3. What are the main barriers?

BARRIERS

Q4. What factors affect the barriers?
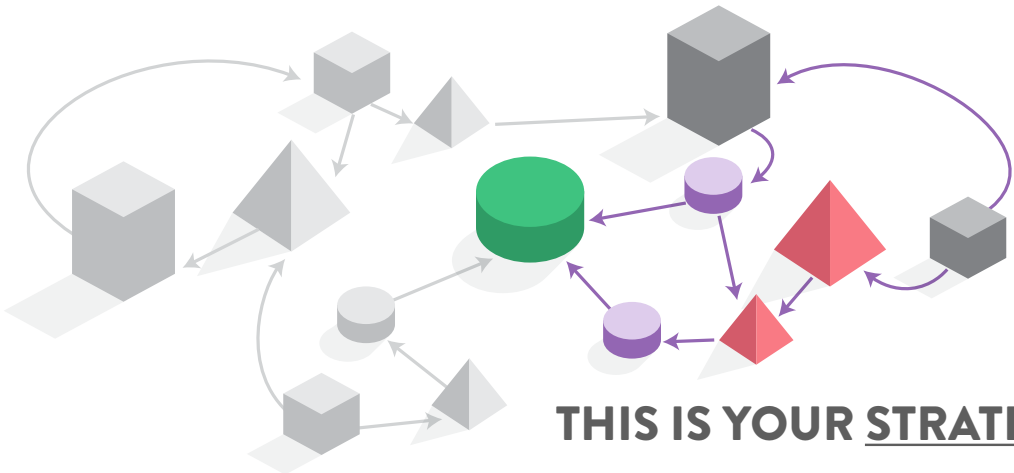

NOW WE KNOW WHAT TO PAY ATTENTION TO

Q5. How are the factors and barriers related?

THIS IS YOUR <u>MODEL</u> OF HOW CHANGE HAPPENS

Q6. What are the clearest paths to success?

THIS IS YOUR <u>STRATEGY</u>

Q7. Whose work affects which factors?
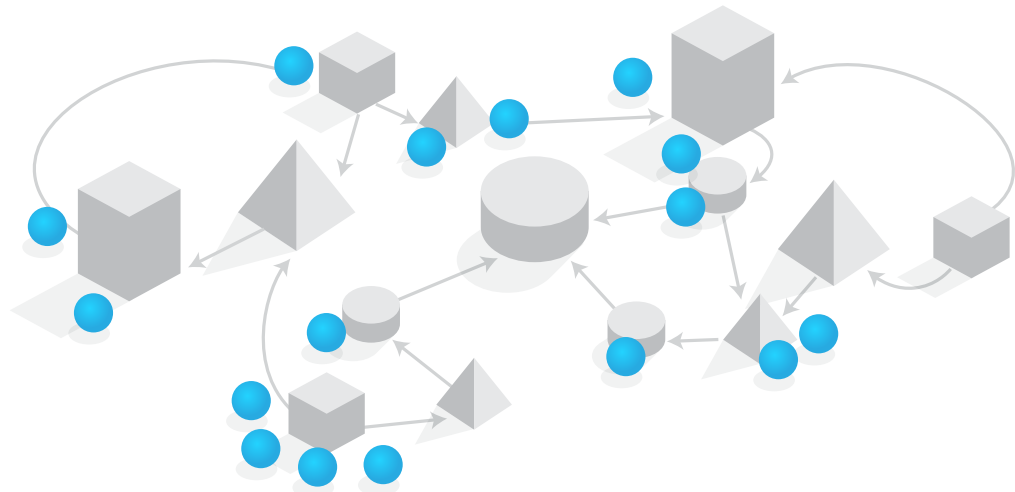
NOW YOU KNOW WHO THE KEY <u>INFLUENCERS</u> ARE

Collective Strategy

FILL THE GAPS (INCUBATOR)

EMPOWER THE INFLUENCERS

WEAKEN THE BARRIERS

TRACK THE INDICATORS

COLLECTIVE STRATEGY

This method for building collective strategies is described in greater detail in the inaugural Foundation for Inclusion *Research Brief,* published in early 2018 (see bit.ly/colstrat).

The innovations described there were developed by FFI's founder, a social scientist and military strategist, over the course of a twenty-year career focused on large-scale change in complex environments. The key insight is to shift the emphasis from *solving problems* to *fixing problem-solving systems*. That's what FFI's portals are designed to achieve.

FIGURE: FFI RESEARCH BRIEF NO. 1

Bob Lamb, "Collective Strategy: A Framework for Solving Large-Scale Social Problems," January 8, 2018 (bit.ly/colstrat)

Foundation for INCLUSION

RESEARCH BRIEF

Issue No. 1 | January 8, 2018

About This Brief

Foundation for Inclusion (FFI) Research Briefs are intended to summarize recent and ongoing scientific research that is likely to be of interest to people working to make the world better. This first issue summarizes the foundational research FFI was built around, focusing on the conceptual innovations that inspired its collective-strategy framework: the dual-system problem, the six levels of problem-solving capability, the whole-parts-gaps framework, and the seven-questions method. Together these innovations shift the focus from solving problems to fixing problem-solving systems and make it possible to discover the most strategic path to large-scale change.

About the Author

Bob is FFI's founder and CEO and formerly a visiting research fellow at the Army War College, conflict director at the Center for Strategic and International Studies, and strategist at the Department of Defense. With a two-decade career as a scholar and strategist, he specializes in how complex societies change and founded FFI as a strategy hub and impact incubator—and the permanent home of social progress.

Collective Strategy: A Framework for Solving Large-Scale Social Problems

By Robert D. Lamb, PhD
bob@foundationforinclusion.org

What does it take to solve really hard problems?

Chronic poverty, cycles of violence, racial and ethnic mistrust, global trafficking, tensions over migration, environmental damage—many of today's biggest challenges seem immune to even the most heroic efforts to resolve them. In divided societies, progress has proven to be reversible, even when hundreds of organizations, thousands of people, and millions of dollars are dedicated to permanent solutions.

Are problems becoming harder, or is our ability to work together to solve them becoming weaker?

I've spent most of my career thinking about how societies change—especially how they fall apart or come together—and how some people manage to influence that change while others fail. This policy brief summarizes my most recent research (some of which is ongoing) and describes methods I have developed to determine what it would take to achieve large-scale change on any topic—what would need to change (by how much), who can change them (by how much), and what's missing. It's a good framework for judging the chances of success—or improving the odds.

The Foundation for Inclusion (FFI) is applying these methods today while continuing research that will make them even more powerful in the future.

THE PORTAL

Each FFI initiative is a collaboration focused on one well-defined social problem and a collective strategy to solve it.

Anyone working on any aspect of that problem may subscribe to the portal FFI sets up for that initiative.

FFI's Collective Strategy platform is designed to host multiple portals at once, so we can launch as many initiatives as there are social problems to be solved!

PORTAL SUMMARY

FFI sets up one portal for each initiative it launches and makes it available to changemakers on a subscription basis. Registered users may access the open area of the portal at no cost.

- **OPEN PORTAL.** Offers a big-picture view of the entire problem space: What is happening *right now* that affects whether we are *collectively* making progress? What are we missing?

- **PREMIUM PRODUCTS.** Models, tools, and data for strategic-level decisionmakers, technical advisers, and scholars (pay wall)

- **MISSION CONTROL CENTER.** Paid access to full suite of FFI products

PORTAL and 7Q

The portal for each initiative is structured around answers to the seven questions (7Q). The first four (goal, indicators, barriers, and factors) are available to everyone. Premium subscribers have access to the rest (models, strategies, and influencers).

	'MISSION CONTROL CENTER'	OPEN PORTAL {free}	TECHNICAL PORTAL	INFLUENCERS DIRECTORY
Q1. **Dashboard** of collective progress toward a defined goal	✔	✔	✔	✔
Q2. **Daily blog** with strategic insights on key indicators	✔	✔	✔	✔
Q3. **Backgrounder** on problem, goal, indicators, barriers	✔	✔	✔	✔
Q4. **System map** with comprehensive view of all factors	✔	✔	✔	✔
Q5. **Quantitative models** used to inform analysis & strategy	✔		✔	
Q6. **Simulation models** for scenario-testing of strategies	✔		✔	
Q7. **Comprehensive directory** of strategic influencers	✔			✔

# 'MISSION CONTROL' FOR SOCIAL CHANGE

In space exploration and military campaigns, command and control centers display mission-critical information in real time. But that's not all: real strategies and operational plans drive those visualizations so decisionmakers can address risks and gaps as needed.

FFI's Collective Strategy platform similarly offers a suite of tools and visualizations that help changemakers be more strategic in how they solve large-scale social problems.

PHOTO: RUSSIA'S WAR ROOM Alexei Druzhinin, RIA Novosti (2014)
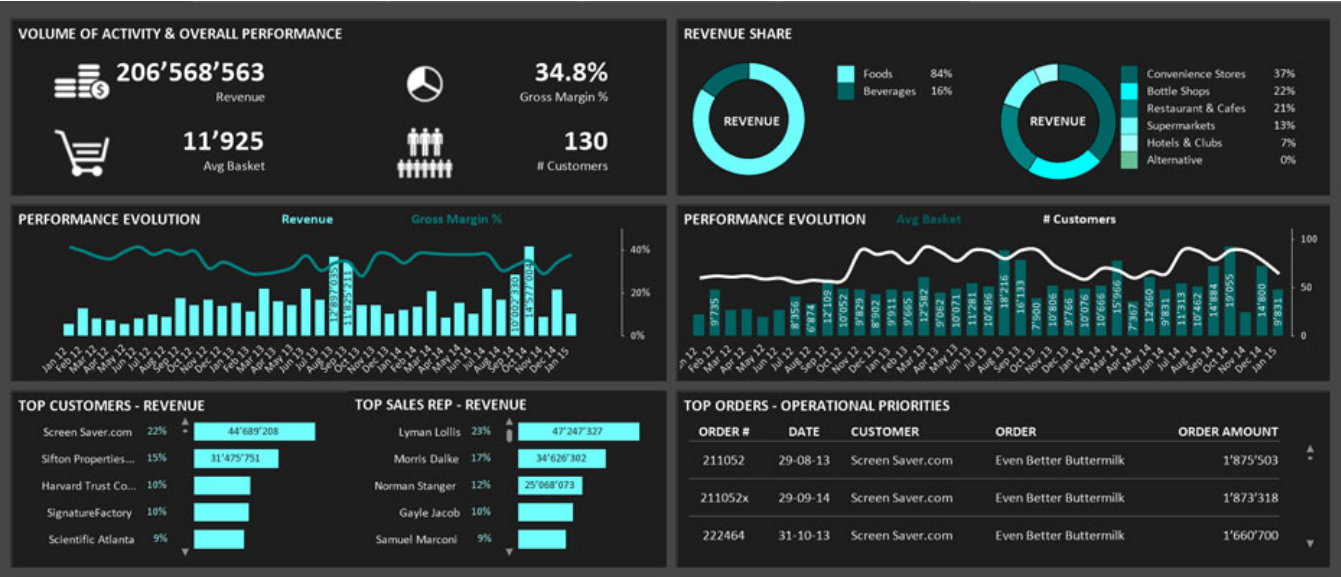
DASHBOARD

Each FFI initiative has its own portal, focused on a single well-defined social problem (e.g., sex trafficking in Atlanta, polarization in Kentucky). After logging on to the platform, subscribers may choose which portal to enter.

The landing page is a dashboard offering visualizations of historical trends, current status, and forecasts of key indicators of collective progress. Within 30 seconds, users know exactly how much progress is being made by everyone working on that problem.

FIGURES: EXAMPLES OF STRATEGIC DASHBOARDS
Dashboard visualizations by Lintao (top) and Wufoo (bottom)

DAILY BLOG

News updates and research reports are widely available for most social problems. But they tend to focus on just part of the problem without relating it to the strategic questions: What does this news imply for whether we can achieve our ultimate goal? What does this research add to what we already know about the problem?

Our blog always connects news and research to the big picture, referring frequently to evidence, models, best practices, and simulation results (different models predict different scenarios, like in weather forecasting; see figure).

FIGURE: EXAMPLE OF MODEL-BASED REPORTING
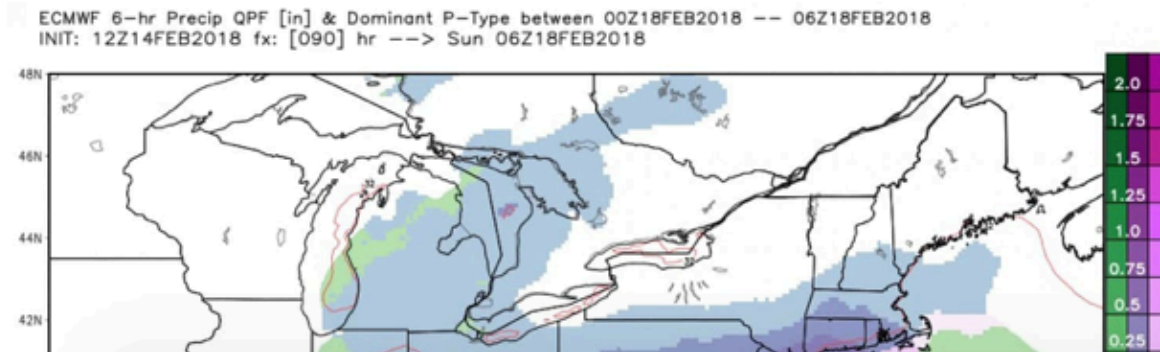Capital Weather Gang (washingtonpost.com)

In this scenario, freezing rain west of the city would be the biggest threat, as surface temperatures during the night could fall into the upper 20s if some of the colder models are correct. East of the city, the storm would primarily bring a cold rain.

This morning's GFS, NAM and Canadian models support this scenario.

2. Moderate snow (30 percent chance)

A low-pressure system tracks to our south and develops off the North Carolina coast quickly enough to keep cold air in place through most of the storm. Snow spreads across the region late Saturday afternoon, and temperatures drop from the upper 30s to around or just below freezing.

Such a scenario would offer a thump of accumulating snow north and west of the city and would offer many the heaviest snow of the season. The snow would fall hard enough to build up some, especially on untreated roads.

ECMWF 6-hr Precip QPF [in] & Dominant P-Type between 00Z18FEB2018 -- 06Z18FEB2018
INIT: 12Z14FEB2018 fx: [090] hr --> Sun 06Z18FEB2018

BACKGROUNDER ON THE INITIATIVE

This section of the portal gives detailed information about the social problem and the scope of the (collaborative) initiative:

- the definition and parameters of the problem the initiative focuses on

- detailed results of the participatory process that identified the initiative's goals, key indicators, and barriers (Q1-Q3), plus historical data and forecasts

- an introduction to the main factors, key feedback loops, and strategic leverage points (Q4–Q6) identified by FFI's technical experts

- a summary of the collective strategy derived from this collaborative process

- a discussion of gaps in the collective strategy, as identified through FFI's ongoing effort to catalogue significant influencers (Q7) in the problem space
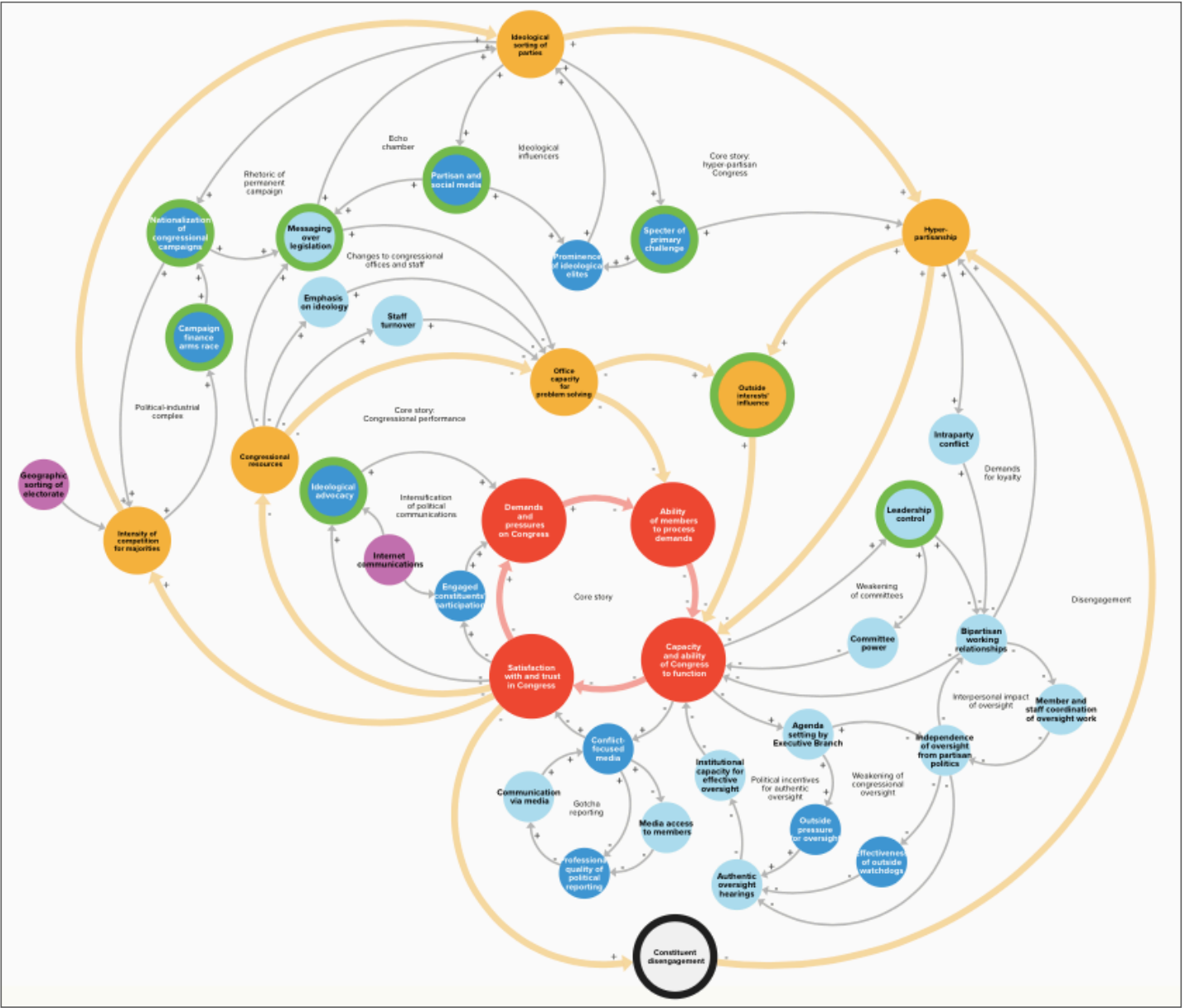
SYSTEM MAP

A system map shows, in one chart, all underlying causes of a complex problem. Users can see exactly how their own work fits in to the big picture at a glance.

The full structure of the problem is visible: how all goals, indicators, barriers, and factors (Q1–Q4) are related; vicious cycles and virtuous cycles; potential sources of unexpected outcomes; and potential leverage points for a collective solution.

FIGURE: EXAMPLE OF A SYSTEM MAP
Democracy Fund, "Congress and Public Trust"
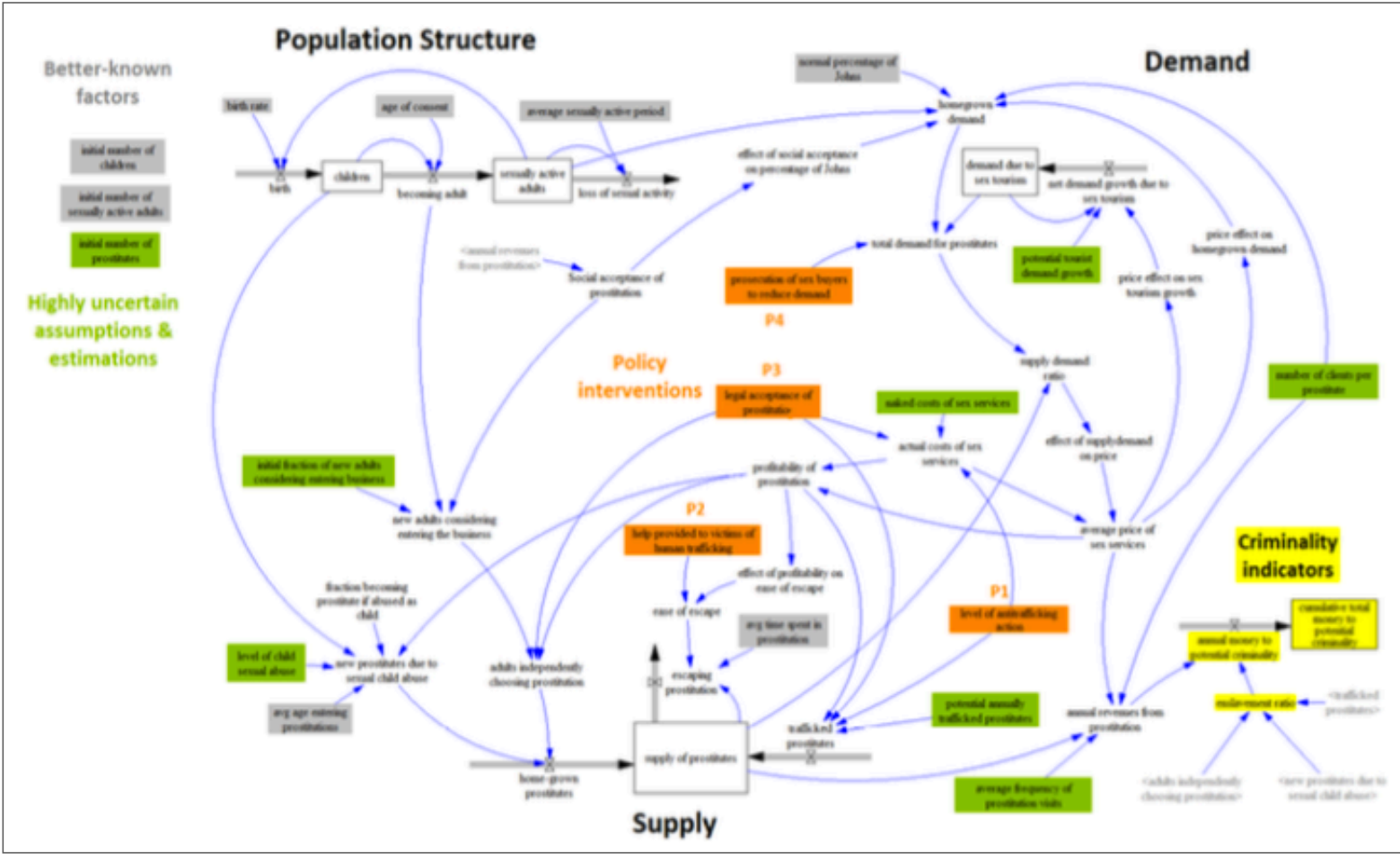(visualization by Kumu: bit.ly/DemFundSysMap)

FIGURE: EXAMPLE OF A SYSTEM DYNAMICS MODEL
Kővári & Pruyt, "Prostitution and Human Trafficking"
(authors' visualization using Vensim: bit.ly/SexTrafSDmodel)

MODELS

System maps represent social problems graphically. Quantitative models represent them mathematically.

Scholars often build models to study social problems systematically. When available, FFI makes quality models accessible via the technical portal so researchers can replicate, validate, and refine them or use them in forecasting.

In addition, FFI's 7Q method engages a wide range of collaborators to produce a system dynamics model suitable for simulation and scenario testing.
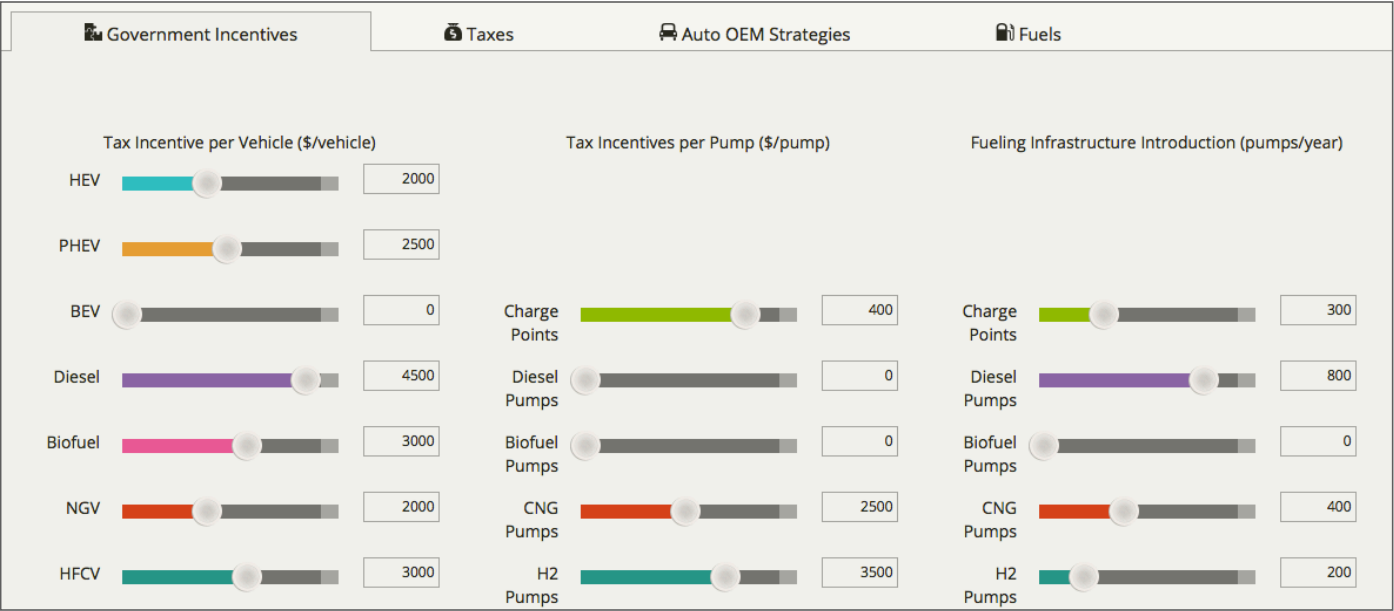
SIMULATION MODELS TO BUILD COLLECTIVE STRATEGIES

Models (e.g., econometric, network, agent, system) can be used to test ideas about how to solve complex problems. FFI uses multiple methods to identify key leverage points (needed to build collective strategies) and lets users test scenarios for their own strategic decisions.

FIGURES: EXAMPLE OF A SIMULATION DASHBOARD

MIT Sloan's "Driving the Future" simulation
(visualization by Forio: bit.ly/MITsimAFV)

INFLUENCERS DIRECTORY

FFI endeavors to catalog everyone and everything that significantly influences any aspect of the social problem under focus, collecting data on their activities, capabilities, and achievements.
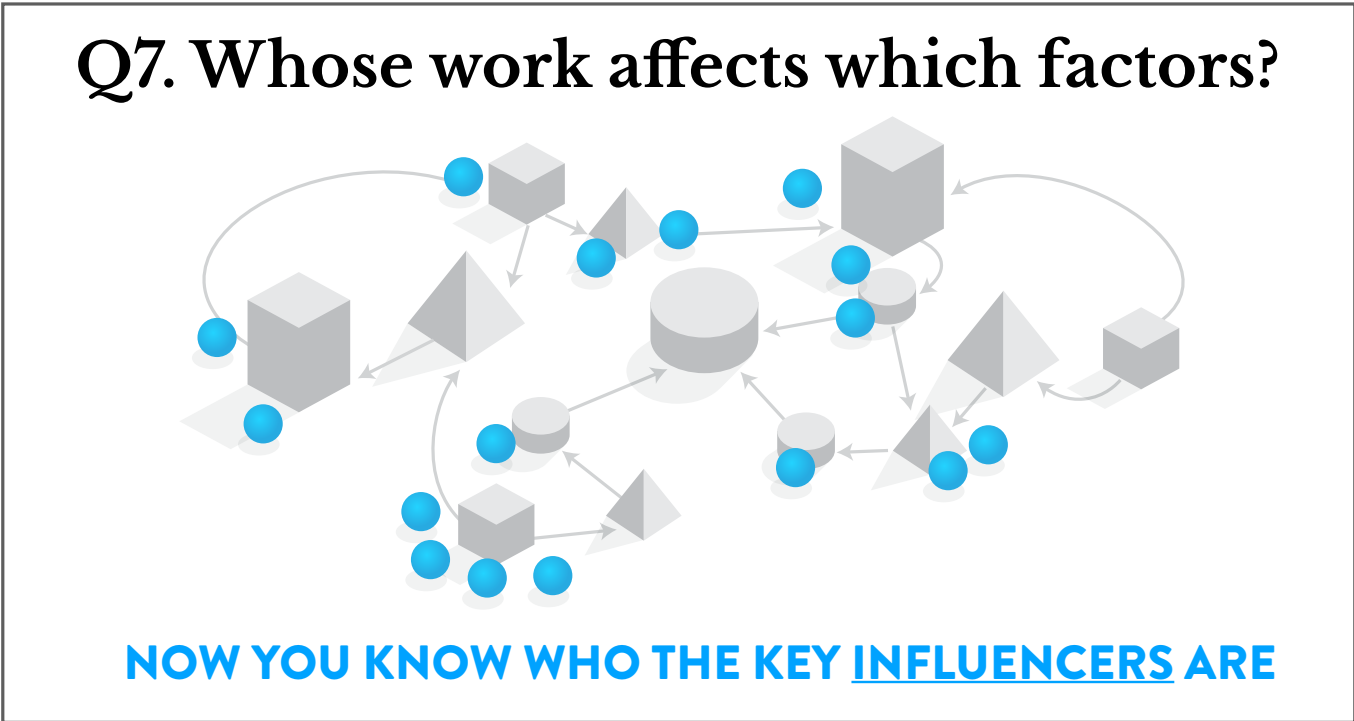
Q7. Whose work affects which factors?

NOW YOU KNOW WHO THE KEY INFLUENCERS ARE

FIGURE: 'INFLUENCERS' IN FFI'S 7Q METHOD
Visualization by Wells Collins for FFI

This data helps identify key gaps in the collective effort and makes advanced modeling of collective strategies possible. Access includes:

- information about ongoing experiments on ways to fill those gaps

- identification of opportunities to invest in scaling up social ventures trying to fill gaps

OPEN PORTAL (free subscription)				TECHNICAL PORTAL ($)		DIRECTORY ($)
DASHBOARD	BLOG	BACKGROUND	SYSTEM MAP	QUANTITATIVE MODELS	SIMULATION MODELS	INFLUENCERS DIRECTORY

IMPACT ACCOUNTING (7Q+)

With a collective strategy and portal in place, subscribers have access to FFI's custom Impact Accounting service, which helps changemakers precisely measure their impact on the ultimate goal and test alternative strategies to improve it.

This is the only portal that can be used for both impact assessment *and* impact evaluation, business management *and* business strategy, and the simultaneous management of cash flow *and* impact.
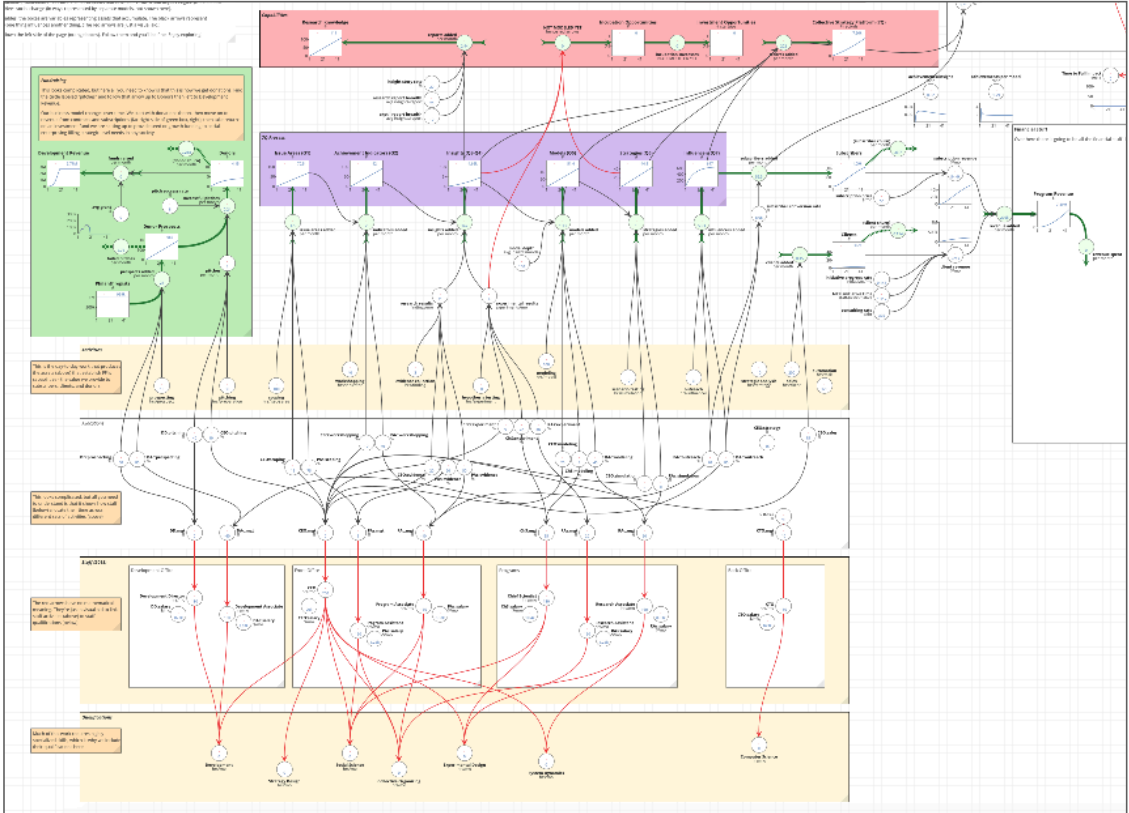

FIGURE: IMPACT ACCOUNTING PROTOTYPE
Visualization by Bob Lamb using Sysdea

THE PROCESS

There is a great deal of flexibility in how the 7Q method's questions can be answered to produce strategically useful content on the FFI platform, but the process *must* be:

- **RIGOROUS**—using any scientifically valid method to find answers

- **ITERATIVE**—with answers building upon partial answers, in any order

- **PARTICIPATORY**—involving people affected by the problem as well as experts
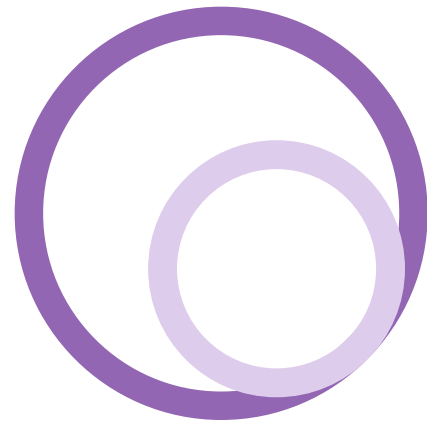
A future brief will describe FFI's process in detail

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