PHASE 1:

BUILDING A
COALITION
FOR CHANGE

*Wayfinder requires careful preparations to set it up for success. This first phase lays the foundation for the rest of the Wayfinder process. The journey begins by building a committed, capable and legitimate **coalition for change** that can drive the Wayfinder process forward and ensure a long-term positive impact.*

PHASE CONTENT

1. Module A: Getting people onboard
2. Module B: Designing the process
3. Module C: Initial system exploration
4. Evaluation, reflection and sense-making

INTRODUCTION

People often have a tendency to jump straight into the process of defining problems and solutions, but unless you have built a proper foundation it is unlikely that your Wayfinder process will lead to intentional change. Therefore, we strongly encourage that sufficient time and resources are spent on building the right coalition for change, designing the process, and doing an initial exploration of the system. In particular, the more transformative change that is sought, the more critical it is to strategically set up and design the process to allow for that.

PHASE CONTENT

In module A, you will assemble the members of your coalition, and collectively agree on an ethical compass for your Wayfinder journey. The coalition prepares for the work to be done by first building its own capacity for systems thinking and reflective practice. In module B, you design your Wayfinder process to suit existing social and environmental conditions. This includes deciding on how and when to engage with a wider group of stakeholders within the system, and to set up a framework that captures and supports learning along the way. In module C, you begin exploring the social-ecological system in focus, by assembling relevant information, such as existing reports and data, and making a first attempt to articulate how your Wayfinder process will contribute to creating positive change in this context.

OUTPUTS

While everything that you will do in this phase, serves a purpose for your subsequent Wayfinder journey, Phase 1 should result in four concrete outputs that are essential to continue. The first and most important is **the coalition itself**. This should consist of a committed and legitimate core group of people with the right skill set and influence to take the process forward. The second output is a **tailored process design**, that is tuned to the local context and where clear principles for engagement with other stakeholders have been decided on. The third output is a **system for information management** that will help you organize, deal with and make use of the large amounts of information and data generated through the process. The fourth and final output from this phase is a **scoping report** that summarizes relevant previous projects and initiatives together with an overview of the kinds of data that are already available.

MODULE A

GETTING PEOPLE ONBOARD

MODULE CONTENT

Work card 1: Assembling the team

Work card 2: Agreeing on principles for good practice

Work card 3: Developing system literacy and reflexive practice

ASSEMBLING THE TEAM

Running a Wayfinder process requires that you engage with a wide range of stakeholders, and collect and analyze a variety of data and information. This work is best done by a small group of key people, a coalition, that can lead the Wayfinder process forward, manage information, deliberate and act on behalf of the wider stakeholder group. Getting the right people on-board in the coalition is critical for the rest of the process. This work card describes three important issues to think about when assembling your team: skill sets, representation, and influence in the system.

SKILLS

A first issue to think about when selecting people for the coalition is the skills needed to conduct a Wayfinder process. This includes process leadership and facilitation skills, as you will need people that can lead stakeholder workshops and dialogues, and move the process forward in a professional, yet empathic, way. As Wayfinder strives to bring about change, controversies will arise throughout the process, for example regarding future aspirations, problem definitions, and the reliability and interpretation of different kinds of data and information. You will need access to people through the coalition with advanced facilitation skills to help navigate through this in a positive way (see Box 1.1 below).

Rowing team practicing on the Lake Jarun, Zagreb, Croatia. Assembling a capable team of people who can work collaboratively to lead the Wayfinder process forward is essential to set it up for success. Photo: iStock.

In addition, you will also need people that are good at pulling together, analyzing, and synthesizing large amounts of data and information of different types. The Wayfinder process will both depend on the inputs of good data, and it will generate lots of information in itself. You need people in the coalition who have the capacity to organize and make use and sense of this information. Similarly, people with skills and experience in designing and implementing different types of development programs, who know how to make things happen in complex settings, are extremely valuable.

Finally, you need people in the coalition that are good at communicating. A Wayfinder process will involve many different types of stakeholders, at different levels and sectors in society. You need people in the coalition who have the capacity to reach out and talk to these stakeholders, explain the rationale for and outcomes of the process, and who are also good at listening to what the stakeholder say in return.

REPRESENTATION

Another important issue to think about when selecting people for your coalition is representation. For the coalition to be successful, it must have legitimacy with stakeholders in the system at different scales. The system that you are working in is probably not homogenous, but will include different groups of people, young and old, men and women, people with different livelihoods and lifestyles, from different ethnic backgrounds and with different cultures, and more. These people may face different kinds of challenges, and have different expectations on the system. For example, if there is a conflict between wildlife protection and small-scale farming in your system, proponents of these two sides are unlikely to describe the system in the same ways, and they may also have radically different ideas about what a desirable future would look like. How can you make sure that the coalition reflects the varied groups of people that it is supposed to represent? It is critical that those people with less power in the system have a voice in the process. This can be a challenge but identifying key individuals that can represent different perspectives in the system in the coalition is very important. If the coalition is not representative, it is unlikely that it will be perceived as legitimate, which means that the chances for achieving the desired change is much lower. Also, and very importantly, if you don't think about representation already at this stage, there is a risk that already marginalized groups

become further marginalized as a consequence of the Wayfinder process.

INFLUENCE

In parallel to skills and representation, you need to think strategically when selecting coalition members. Where and how are decisions made that influence the future of your system? Rather than just assembling a team of your regular colleagues and friends, try to identify people for the coalition who has influence in important decision networks locally, and also those that can influence decisions in relevant sectors at higher scales. Many processes like this come to a halt after the planning phase, since they often lack the agency to make sure that their plans are implemented in reality. Who are the key people that need to be on the coalition to make sure this is not the case for your Wayfinder journey, so that the assessment and planning work that you do will lead to real change? One important issue to reflect on here is to what extent to you want to include people with formal decision making authority, i.e. the conventional power players, vis-a-vis forming a coalition that rather includes other types of change makers. The latter category may have less vested interests in maintaining the system as it is, but at the same time also less formal power to change it.

CREATING A CAPABLE, EFFECTIVE AND LEGITIMATE COALITION

Not all coalition members need to possess all the skills listed above themselves, and each individual member can of course only represent some of the interests in the system and be connected to some of the important decision networks. However, given the nature of the Wayfinder process, all coalition members need to be creative, good at teamwork, and committed to working for sustainability (see Box 1.2 below). Assembling the right team so that your coalition for change, as a whole, becomes as capable, effective and legitimate as possible, will greatly improve your chances for a success. The attached case from an ongoing Wayfinder process in Senegal describes how they opted for creating two different coalitions, one at the local level and one at the national level.

BOX 1.1 – SKILLED FACILITATION

Facilitation is central to the Wayfinder process. There are few steps and processes in the Wayfinder process that don't require working with groups of people, often with differing interests and views on what should happen in the future. Aside from the obvious skills of being able to organize getting people together etc, helping people work together

towards a common set of aspirations requires some specialist skills, including the capacity to;

- Connect and build rapport with a diversity of personality types
- Establish and get agreement on ways of working together
- Listen, reflect back and synthesis
- Manage conflict
- Probe and draw out deeper insight from stakeholders
- Plan, structure and implement processes
- Capture information accurately and faithful to the original intent
- Pay attention to micro-dynamics and emotions among groups of people
- Be flexible and have a range of approaches and tools as back-up

BOX 1.2 – JOB DESCRIPTION FOR A COALITION MEMBER

SKILLS, RESOURCES AND NETWORK

The coalition should include a strategic combination of people that possess the various skills and resources that are needed to take the process forward. Having skills in facilitation, engagement and communication, strategic and operational thinking and 'know how' to get things done in complex settings are critical skills. Other important elements include having strong links to stakeholders, the ability to cross social and organizational boundaries and knowledge of power and politics in the system are important skill sets to have as part of the coalition. This includes having the links within and between communities, and at different scales.

MINDSET AND COMMITMENT

The individuals in the coalition should be creative, open to change and willing to challenge their own assumptions. They should share the values of the Wayfinder process (Box 2.1.on work card 2) and should have the motivation to drive change through the process. Being flexible and creative in terms of how things get done, being comfortable with

uncertainty and 'messiness' and maintaining an ability to see the big picture are important skills for coalition member.

WORK CARD 2:

AGREEING ON PRINCIPLES FOR GOOD PRACTICE

Once you have assembled your team, an important early task will be to agree on a set of common principles for good practice on your Wayfinder journey. These principles should spell out the ethical guidelines for the process. This work cards suggests a few useful principles that you can start your dialogue around.

WHY DO YOU NEED A SHARED MORAL COMPASS FOR THE PROCESS?

Since Wayfinder's explicit goal is to drive adaptive or transformative change, you should expect that the

Wayfinder process will have an actual impact on people's lives. It is therefore very important to make sure that there is a shared moral compass to guide the process. The more vulnerable the context, e.g. in aid-dependent communities or where there are large inequalities between different groups of people, the more important this issue is.

The principles for good practice should also clarify the agile and reflexive mindset that is needed among coalition members to deal with complex systems and multiple stakeholders. Wayfinder may be different from other ways of working that coalition members are used to, so building a common mindset around how the process should best be run, and how decisions should be made, increases the chances of a smooth and successful process.

Teenager standing in the crowd of customers at the Chitrakoot village vegetable market, Madhya Pradesh, India. Early on in the Wayfinder process, it is important to agree on a set of principles for good practice that will serve as ethical guidelines for the work to be undertaken. The more vulnerable the context, the more important these principles are. Photo: iStock.

FORMULATING YOUR PRINCIPLES

In Box 2.1, we provide a list of principles for good practice that can be used as a starting point for creating your own principles for the process. The principles can be formalized into an ethical charter, as was recently done in a Wayfinder process conducted in Senegal (see attached case), and you may want to consider having all members of the coalition signing it to ensure that there is strong commitment to the principles, especially if the Wayfinder process is conducted in a vulnerable context. These principles can

be used to guide decision making, help to design processes within Wayfinder and importantly to evaluate how well we have met these principles through our own thinking and behavior.

BOX 2.1 – PRINCIPLES FOR GOOD PRACTICE

- We will do no harm and not perpetuate disadvantage and injustices
- We acknowledge and challenge power dynamics, where required for driving change towards sustainability
- We acknowledge and manage our own biases that influence our thinking
- We strive for transparency and accountability in the Wayfinder process, recognizing our responsibility in leading this process
- We acknowledge and respect that there are multiple legitimate viewpoints and sources of knowledge
- We commit to a reflective practice and to challenge our own assumptions
- We are willing to continuously adapt the Wayfinder process to changing circumstances

EXCERPT FROM ETHICAL CHARTER FOR WAYFINDER COALITIONS IN SENEGAL (SHORTENED AND MODIFIED)

A research approach applied to development. Our approach is at the interface between research and development. It relies on collaboration between researchers, practitioners, managers and government actors.

A collective approach for a more resilient future. The implementation of Wayfinder aims at facilitating a collective definition of a desirable future for all actors involved in the Great Green Wall in Senegal. This will include the co-construction of new practices and tools for implementing the Great Green Wall in Senegal and making it a vector for improving the resilience of the social-ecological systems along it.

Complementary knowledge and multiple viewpoints. This work will require dealing with theoretical and practical aspects of management of land and natural resources in complex and dynamic social-ecological systems. For this, we recognize the need to synthesize scientific and local knowledge by guaranteeing respect of the knowledge and its carriers.

Engaging national actors to generate action. To improve the legitimacy of our approach and ensure relevant future results, we work with coalitions that include academic, government, and local actors.

An iterative process at the service of Senegalese actors. Due to the complex nature of the social-ecological systems that we work in, our approach requires an iterative process between field work

(through participatory workshops) and analysis with the coalitions. This allows: i) taking into account local and regional realities, (ii) scrutinizing new ideas and models, and iii) producing recommendations that are relevant for local actors and national decision-makers.

WORK CARD 3:

DEVELOPING SYSTEM LITERACY AND REFLEXIVE PRACTICE

Wayfinder, with its resilience focus, is rooted in systems thinking. It emphasizes the need for reflexive practice and learning as the only viable approach to management in contexts of complexity and deep uncertainty. Since this perspective and approach is quite different from many other approaches to sustainability, some initial capacity building among coalition members may be useful. This work card helps you get started.

WHY DO YOU NEED TO PRACTICE YOUR SYSTEMS THINKING SKILLS?

The capacity for systems thinking is critical to the rest of the Wayfinder process and the sooner a system 'lens' is adopted the better. Systems thinking is a new perspective for many people and may take some time to internalize. This capacity will grow throughout the process, and not everyone needs to become an expert, but it is important all coalition members at least have a basic systems literacy when starting your journey together. This includes realizing that the problems that you try to solve most likely will be cross-sectorial and have important scale dimensions. It also includes understanding that all interventions in complex systems will produce a range of outcomes, included unintended ones, common input-output or linear types of log-frames will not be enough to monitor whether or not you are moving in the right direction.

There are numerous tools and guides available to support this capacity building, starting a discussion around the iceberg model (see attached activity sheet) is usually fruitful. The attached case describes how they went about to start building capacity for systems thinking in a Wayfinder coalition in Senegal.

Click here to learn more about complex systems from Rika Preiser, Senior Researcher at the Centre for Complex Systems in Transition at Stellenbosch University

The complexity based perspective underpinning Wayfinder is different from many other approaches to development practice. Taking the time early on in the Wayfinder process to build capacity for systems thinking and reflexive practice within the Coalition will be a worthwhile investment as this will radically improve the outcomes of the process. Photo: iStock.

BECOMING A REFLEXIVE PRACTITIONER

The ability to critically reflect on one's own actions and mindset – what we call reflexive practice – is also a critical capacity to successfully run a Wayfinder process and should be a cornerstone among the principles for good practice (see work card 2).

Important leverage points for achieving systemic change lie in what is often referred to the "personal sphere" – our beliefs, values and worldviews – and changes in this sphere always start with the individual. Maintaining a flexible and open mindset is therefore a prerequisite to be able to drive deeper, more transformative change in your system.

Setting aside time for deeper reflection around the values that are guiding your actions in the coalition and challenging yourself to understand how problems and solutions are related, to distinguish real evidence from what in fact may be assumptions, and to try to reveal deeper beliefs around what you are doing and why, is essential. This is also called double and triple-loop learning, and we will come back to the importance of this kind of "deep learning" later on in this guide. The evaluation, reflection and sense-making questions at the end of each phase, are designed to help you do this. Meanwhile, use the attached discussion guide to start reflecting on your own expectations for the Wayfinder journey.

MODULE B

DESIGNING THE PROCESS

MODULE CONTENT

Work card 4: Tailoring the process

Work card 5: Deciding on principles for stakeholder participation

Work card 6: Setting up a system for information management and learning

TAILORING THE PROCESS

Without a good process for knowledge generation and decision-making it is difficult to achieve any lasting change. In particular, the more transformative change you strive for, the more focus you need to be put on process design. Wayfinder is designed to be applicable in a wide range of settings, but the specific process you run will need to be 'tuned' for your particular setting and for your goals. This work card describes a set of key issues to consider when tailoring your process.

CONSIDER THE 5 C'S

General advice for how you go about the five different phases are presented throughout the guide, however at this initial stage it is useful to think about the 5C's, listed in box 4.1 (context, culture, capacity, cognition and creativity), as a way to start tailoring the process design to the specificities of your context.

The 5 C's will influence for example how many workshops and meetings that are appropriate, what kinds of meetings that will be most useful, or what kind of data and information that needs to be collected. Identifying these issues up front will enable you to design a process that effectively meets the existing needs and challenges.

Discussion around these issues among coalition members will help you determine how different phases of the process should be carried out more precisely (see attached activity sheet).

A group of geology students gets a lecture on a beach in Dorset, southern England. Wayfinder is designed to be applicable in a wide range of settings, but the specific process you run will need to be 'tuned' for your particular setting, considering for example the local context and culture. Photo: M. Axelsson/Azote

BOX 4.1 PROMPTS FOR TAILORING THE PROCESS

Context – What is the general landscape like? Is it remote with low population or are there large urban areas? What is the climate like? Does the landscape or climate represent any challenges for engaging with stakeholders? What has been the history of interventions, and how have people tried to solve problems in the past? What are the important spatial and temporal scales in the system that might influence how you run the process? The context will influence, for instance, how often it is appropriate to bring stakeholders together in a workshop setting, or where meetings should be held.

Culture – This refers to both ethnic culture but also to the social culture. Generally, is it open to change? Have current ways of doing been fixed for long periods of time? Are stakeholders willing to come together? What are potential conflicting interests related to this process? Which specific religious or cultural norms need to be observed and respected during the process? How is gender inequality specifically addressed in the design of the process? The culture will influence, for instance, the timing and format of stakeholder meetings.

Capacity – Do the skills and resources exist to support the Wayfinder process? Where there are gaps, how will these be filled? Are there governance arrangements to support the Wayfinder process and to implement outputs? Who are the changemakers in the system? Who has power in what areas and who hasn't? The capacity in the system will influence, for instance, who is invited to participate, and in what way they are brought into the process.

Cognition – How do key stakeholders think about the problems the area faces? Do people engage with ideas of complexity and systems thinking, or are other explanatory models dominant? Is there a heavy reliance on external help to solve problems? How do people think about change, risk and unexpected events? Cognition will influence, for instance, what you do during stakeholder consultations, what kind of capacity building you might need to design into the process, and what expert input that might be needed at different phases of the process.

Creativity – Where do new ideas come from? Can you see signs of innovation in the system? Are there groups of people experimenting with different ways of doing things in the system? Where and how can other forms of creativity and expression be incorporated into the process? Is there a willingness to experiment? Creativity will influence, for instance, who you engage with in the process and how you ensure that solutions stemming from the Wayfinder process are truly innovative. You may need to stimulate innovation or connect to people outside the system to generate new ideas.

WORK CARD 5:

DECIDING ON PRINCIPLES FOR STAKEHOLDER PARTICIPATION

Wayfinder is a collaborative process that relies on the active involvement of people that are part of the system that you set out to change. Different stakeholders contribute different types of knowledge to the process, and participation also builds engagement and creates legitimacy. At the same time, engaging with many groups of people takes time, and having many people involved may

sometimes also prevent action. This work card provides some advice for what to think about when deciding on principles for stakeholder participation.

MAPPING STAKEHOLDERS IN THE SYSTEM

To identify relevant social groups and key actors in your context, it is useful to conduct an initial analysis of social structures and power dynamics. At this stage, the analysis should focus on the implications for process design, in terms of who to involve at what stage of the process, in what way, and to what depth. This is an important issue, since alternative process designs may empower or disempower different groups of people. There may also be trade-offs between broad participation, where many different groups of stakeholders are actively involved in the process, and effective decision-making. Thus, before engaging with a wider group of actors and stakeholders, issues around participation need to be thoroughly discussed in the coalition.

A group of women spend the afternoon together in the shade, Avaniya village, Gujarat, India. Wayfinder is a collaborative process that relies on the active involvement of people that are part of the system that you set out to change. Before getting started, it is important to think through principles for stakeholder participation, deciding on who should be involved in the process when and in what way. Photo: A. Löf/Azote.

DIFFERENT FORMS OF PARTICIPATION

There is a large body of literature on the subject of participation. The term is used in a range of contexts, ranging from what has been called "manipulative participation" (where "participation" occurs through a powerless representative of a wider group of people who only is put in place for show), to situations of self-mobilization, where people actively take the initiative to organize themselves and act for something they believe in. In between these two extremes, there is a

whole spectrum of shallower to deeper participation that may be more or less appropriate and justifiable depending on the situation and context. Here we will focus on some key issues related to participation to consider when you design your Wayfinder process.

BALANCING BROAD AND STRATEGIC PARTICIPATION

Wayfinder deals with highly complex sustainability issues. There is not one correct way to describe these types of problems, neither are there any straightforward simple solutions to them. Bringing different groups of people together, that have different and complementary knowledge, perspectives, and priorities will generate a more nuanced and multifaceted understanding of a system and how to engage with it. Thus, engaging broadly with different groups of people, in a consultative way, has some clear advantages in a Wayfinder process. Deeper participation of key stakeholder groups, where they are actively involved to shape and co-design the process, is also important. This type of participation builds engagement and enhances the legitimacy of the Wayfinder process, increasing the chances of successful implementation of any plans that come out of the process. At the same time, broad participation of

many different stakeholder groups often comes at a cost of what is perceived to be effective decision-making. Engaging with many different stakeholder groups takes time and resources. In some cases, it may also prevent action, for example if conflicts that cannot be managed arise. Therefore, in a Wayfinder process one also needs to be strategic about getting critical stakeholders around the table, at the right time.

IMPLICATIONS FOR THE WAYFINDER PROCESS

While it is difficult to give very specific advice here, a general recommendation is to seek broad participation in Phase 2 when joint aspirations are formulated and key dilemmas are identified, so that are large part of the community help frame the process and give it a relevant focus. In phase 3, when you explore system dynamics, you will likely need to involve both key stakeholder groups and some external experts, such as scientists. In Phase 4, it might be wise to be more strategic about who should participate, to ensure that people with innovative ideas and key decision makers, influencers and/or other changemakers in the system are actively involved. Phase 5, which is about implementation, will require that you engage more broadly again, with the larger community.

Regardless of how you go about involving people in your Wayfinder process, communicating well and managing expectations around the process is a key for success. The attached case from an ongoing Wayfinder pilot in Senegal, shows how they reasoned when deciding on principles for stakeholder involvement in their process.

SETTING UP A SYSTEM FOR INFORMATION MANAGEMENT AND LEARNING

Wayfinder is a learning process, that both collects large amounts of data and information, and generates many different types of outputs. It is essential to have structured way of dealing with all this material, so that you can make proper use of it throughout the process. This work cards describes how you can go about to set up a system for information management and learning.

A WHOLE LOT OF DATA

In each phase of Wayfinder data will be collected, and new knowledge will be generated. This information will span a wide range of quantitative and qualitative formats and cover many different topics, such as climate change patterns, land use data, human development indicators, consumer behaviors, preferences and perceptions, existing management plans and legislation, and so on and so forth. This information will need to be assembled, stored, synthesized and communicated to relevant stakeholder groups in appropriate ways.

Wayfinder is a learning process. Setting up a system for information management, will help you organize and store the large amounts of data collected and the information generated through the process, so that you can make proper use of it and learn. Photo: iStock.

MANAGING INFORMATION

At this stage, you therefore need to agree in the coalition on a system for information management. This will enable learning both in the coalition and among process participants more broadly. Importantly, this will also reduce the vulnerability to changes in the composition of the coalition. If information is not properly managed and stored, there is a high risk that important insights from the Wayfinder process are lost if key individuals for some reason no longer are involved. The activity sheets and checklists associated with some of the work cards will help you summarize the work that you have done, but they do not cover everything, so you will have to decide on a format to store important findings that are not captured there. You also need to think about how to set up the infrastructure around this. Consider for example if you would like to use some available project management tool, where you collectively can manage your Wayfinder project, upload data and materials, keep track of what to do next, and communicate with each other in the coalition.

PLANNING FOR HOW TO MAKE USE OF IT ALL

In addition to this, you also need to think about *how* you can learn as much as possible from your Wayfinder process and take stock of all the data that has been collected and knowledge that has been generated. The evaluation, reflection and sense-making questions that we provide at the end of each phase are intended to stimulate learning, and particularly deeper learning, but you also need to set a side time in the coalition to jointly debrief and discuss the progress continuously along the way, so that you can adjust your Wayfinder process accordingly. Decide on a format for this that works for your coalition. We will come back to the issue of learning in Phase 5 "Learning your way forward". There, we move from assessment and planning into action, and the Wayfinder shifts character substantially. In Phase 5 you will need to develop your information management system and your learning framework further so that it allows you to monitor how your implementation works, i.e. to what degree the strategies designed in the Wayfinder process have the capacity to create the change that was sought after.

MODULE C

INITIAL SYSTEM EXPLORATION

MODULE CONTENT

Work card 7: Mapping available data and information

Work card 8: Articulating assumptions about how to achieve systemic change

MAPPING AVAILABLE DATA AND INFORMATION

A common problem in the start-up of many new projects is that people often do not take the time to properly investigate what has already been done in related fields in that area. Spending a bit of time at this stage to map out available data and background information and compiling this in a scoping report is well worth the time, as the overview this gives you is likely to save you time in the end. This work card describes some key issues to consider when mapping out available data and information and compiling your scoping report.

SPENDING A BIT OF TIME NOW TO SAVE TIME LATER

People often have a tendency in these kinds of processes to want to jump right into the problem-solving phase. While this is understandable, it is not advisable. As with other activities in this phase, mapping out available information and compiling a scoping report, contributes to building a proper foundation for the remainder of the Wayfinder process. In the end, this will likely both save you time and some unnecessary frustration on behalf of stakeholders in the system that may have seen or been involved in other similar efforts in the past.

Starting up your Wayfinder process, it is important to realize that you never really start from zero. Mapping out available data and relevant pre-existing information and compiling this into a scoping report will save you time in the end. Photo: iStock.

IDENTIFYING RELATED PROJECTS AND AVAILABLE DATA

A good way to start is to map out previous efforts, projects, or interventions that have had similar

objectives as you have. Who initiated them, what did they lead to, and why were they successful or not? Are there legacies that you could build on, or even an ongoing initiative that it makes sense to team up with? Try to learn from what already is happening in your system, and make use of that in your Wayfinder process. It is important to realize that you never really start from zero, there are always change processes underway.

Also, try to foresee what kind of data that you will need in at various stages of your Wayfinder process. Have some of this data already been collected by someone else, and if so, can you access it? A scoping report should both contain information on the kind of data that is available as well as on knowledge gaps that you already know of. It is likely that this type of exercise will direct your attention to key actors and organizations in the area that you may want to consult with during the Wayfinder process, and maybe even those that should be involved in the coalition from the start.

ARTICULATING ASSUMPTIONS ABOUT HOW TO ACHIEVE SYSTEMIC CHANGE

Before moving into Phase 2 where you engage with a broader group of stakeholders beyond the coalition, it is important to reflect on the type of change that you hope to achieve through the Wayfinder process, and how you believe this change will happen. This work card guides you through that discussion.

CREATING A ' CHANGE NARRATIVE' RATHER THAN A 'THEORY OF CHANGE'

Before engaging the wider community in this work it is worth spending some time in the coalition to reflect on how you think the Wayfinder process will contribute to creating a more sustainable trajectory for your system.

This is the very first step in developing what we call a "Change Narrative". We use this term on purpose, and you should not see this as a "theory of change" (see box 8.1), but rather as a developing hypothesis. The Change Narrative is a synthesis of your current understanding of how systemic change may be achieved in your system. It takes the shape of a simplified story that considers the inherent complexity and uncertainty of social-ecological systems.

This story is central to Wayfinder. It will evolve greatly throughout the 5 phases, as new knowledge is generated and your collective understanding of the system dynamics deepens. In the end, the Change Narrative will be concrete and plausible enough to take the form of a strategic Action Plan that can be tested in reality.

Before engaging with a broader group of stakeholders, it is important to reflect on the type of change that you hope to achieve through the Wayfinder process, and how you believe this change will happen. Why will the Wayfinder process be different? This is the very first step in developing your Change Narrative. Photo: iStock.

CHANGE NARRATIVE COMPONENTS

Very briefly, the Change Narrative in Wayfinder has three key components (figure 8.1). The first component is *leverage points for systemic change*, which are locations in the system dynamics whereby a small intervention has the capacity to influence the system behavior substantially. The second component is *agency*, which refers to who has the capacity to influence those leverage points. The third component is the *overall opportunity context* for making change happen, which consists of existing social and institutional structures in which we, as actors, are

embedded, and which may hinder or facilitate different kinds of change.

Figure 8.1. The Wayfinder Change Narrative has three components: leverage points for systemic change, agency, and opportunity context. Leverage points refer to places in the system whereby a small change has a substantial influence on system behavior. Agency refers who has the capacity to influence those leverage points. Opportunity refers to the overall context of factors that may enable or hinder change in a system at any given point in time. The Change Narrative is a "storied" account of how change may happen in your system that considers these three issues. Illustration: E.Wikander/Azote

We will come back to this with a lot more detail later on in this guide, but at this stage it is useful to have a first discussion in the coalition (see attached discussion guide) about how you believe that change generally happens in your system, how you think the Wayfinder process may contribute in creating change, and reflect on how you in the coalition are positioned in relation to the system that you are trying to change, i.e. your sphere of influence (figure 8.2). Reflecting on these issues now informs the expectations on the process and enables you to be strategic about how to design the process. It also gives the process its very first, overarching framing.

Figure 8.2. The extent to which the Wayfinder process will be able to contribute to change in the targeted system, depends on where the Wayfinder process is situated in relation to that system. Reflecting on your own position and sphere of influence, in relation to where important decisions are made that shapes the system's future, is therefore important.

BOX 8.1 – CHANGE NARRATIVE VS THEORY OF CHANGE

In Wayfinder we work with a "Change Narrative" instead of the traditional "theory of change" concept that is commonly used to inform development programs and projects. The Wayfinder approach is not compatible with conventional theories of change for two main reasons.

First, in practice conventional theories of change tend to assume a linear cause and effect model of change, which does not match with the complexity perspective that underpins Wayfinder. Trying to create change in complex systems will produce both intended and unintended consequences. Small-scale experiments can help reduce uncertainty, but in these types of systems, some level of uncertainty will always remain. Therefore, the inputs, outputs, outcomes logic that are often reflected in conventional theories of change do not work when dealing with sustainability issues in social-ecological systems.

Second, "theory of change" often implies a single way forward in contrast to multiple future trajectories and the notion of strategically navigating within sustainable and just boundaries and improving option space over time, which is the focus of Wayfinder. As an alternative, we use the concept change narrative, which we see as a more dynamic representation of how you believe change might happen in your system, focusing on systemic leverage points for change, the agency to influence those leverage points, and the overall opportunity context for making change happen.

EVALUATION, REFLECTION AND SENSE-MAKING

EVALUATION

Before proceeding to the next phase, take some time to evaluate the quality of the process you have conducted so far, along with the quality of the data, information and content generated through this process. Use the list of conditions below to guide your evaluation. If you feel that you have not covered all points, we encourage that you revisit Phase 1 and see how to improve on the process or content before moving on to phase 2.

- You have a skilled, representative and influential coalition in place
- You have agreed on principles for good practice that will serve as a moral compass on your Wayfinder journey
- You have designed your Wayfinder process to suit the local context
- You have worked out principles for who, when and how different stakeholders should be involved in the process

- You have set up a system for managing data and information generated through the process, and you have decided on how you will use this to support learning
- You have mapped out and collected available data and information that is relevant for your process
- You have articulated your assumptions in the coalition about how change happens in your system, and reflected on the sphere of influence of the Wayfinder process
- You have enough resources, time and capacity to conduct a Wayfinder process

REFLECTION

Having evaluated your work, it is useful to reflect a bit more deeply on what you have learnt from the Wayfinder process so far. Use the questions below to guide this exploration. Make sure to capture your learnings, they will be important to guide you later on in the Wayfinder process.

- Reflect on the composition of the coalition. In what way is the coalition representative for the system that you set out to change? How were people selected for the coalition? How did you decide who would be there or not? Can you

anticipate any stakeholder groups that may feel under represented in the processs?

- Reflect on your own assumptions about the Wayfinder process. What can you learn from other attempts to address the issues you are interested in? In what ways do you expect this process to be different?
- Reflect on the system that you are trying to change. Is there a willingness to work for sustainable development in the system, beyond the coalition?

SENSE-MAKING

Finally, try to make sense of what all this means for your ambition to navigate the system you are interested in towards a more sustainable, safe and just future. This is crucial to make sure you keep moving in the right direction.

- Is Wayfinder the right process for you, your team, your project, right now? Or is there other things that need to be done first, before you are ready to embark on this journey?