

Measurement, Evaluation, and Learning: A Guide for Field Catalysts

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Context for This Guide

The best measurement approaches for direct service programs do not easily translate to systems change work. Thus, field catalysts require a learning orientation and new frameworks for effective measurement, evaluation, and learning (MEL).

This guide is a resource for field catalysts (or organizations taking on field catalyst roles) to support MEL approaches that assess progress against organization- and field-level outcomes and that communicate their impact to funders.

Funders and field catalysts need signals of progress—and a shared language to talk about them—to indicate whether the system is moving in the desired ways. We frequently hear from funders and field catalysts alike that there are multiple challenges to capturing and communicating these signals, including:

- **Unfamiliar measures of progress:** Field catalysts often have signposts that indicate progress toward systems change, but they are not the measures that funders are familiar or comfortable with.
- **Attribution versus contribution:** It is difficult to attribute impact solely to specific activities—funders and field catalysts may need to recognize contribution to an outcome rather than full attribution.
- **Field catalysts’ dual lens:** Field catalysts focus both on ecosystems working to drive change and on systemic barriers and “leverage points”: places in the system where a small shift could lead to large changes.

See the [Appendix](#) for more Bridgespan research and insights on field catalysts and systems change.

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Building an Effective Theory of Change

Measurement, Evaluation, and Learning: What to Measure

Lens 1: State of the field/ecosystem

Lens 2: Systemic barriers and leverage points

Communicating with Funders

Appendix

A clear **theory of change** grounds an effective measurement, evaluation, and learning approach

What is a theory of change? A theory of change explains HOW your organization will achieve impact—the approaches you will undertake and the other actors you will work with or alongside.

How does a theory of change relate to measurement, evaluation, and learning (MEL)? A theory of change provides a foundation for MEL. It defines what you believe will drive impact, while your MEL approach describes how you will measure progress against that hypothesis.

What is unique about theories of change for field catalysts? Field catalysts identify systemic barriers and leverage points to achieve collective goals *and* develop the field of actors working to transform the system. Field catalysts’ theories of change articulate hypotheses, learnings, and progress toward impact to field actors and funders. They are deeply informed by the field and often developed in consultation with the field, and they reflect choices on what activities the field catalyst will prioritize to support field-level impact.

What makes for an effective theory of change for a field catalyst? An effective theory of change provides short-, intermediate-, and long-term indicators

of progress in the context of a field catalyst’s overarching impact goal:

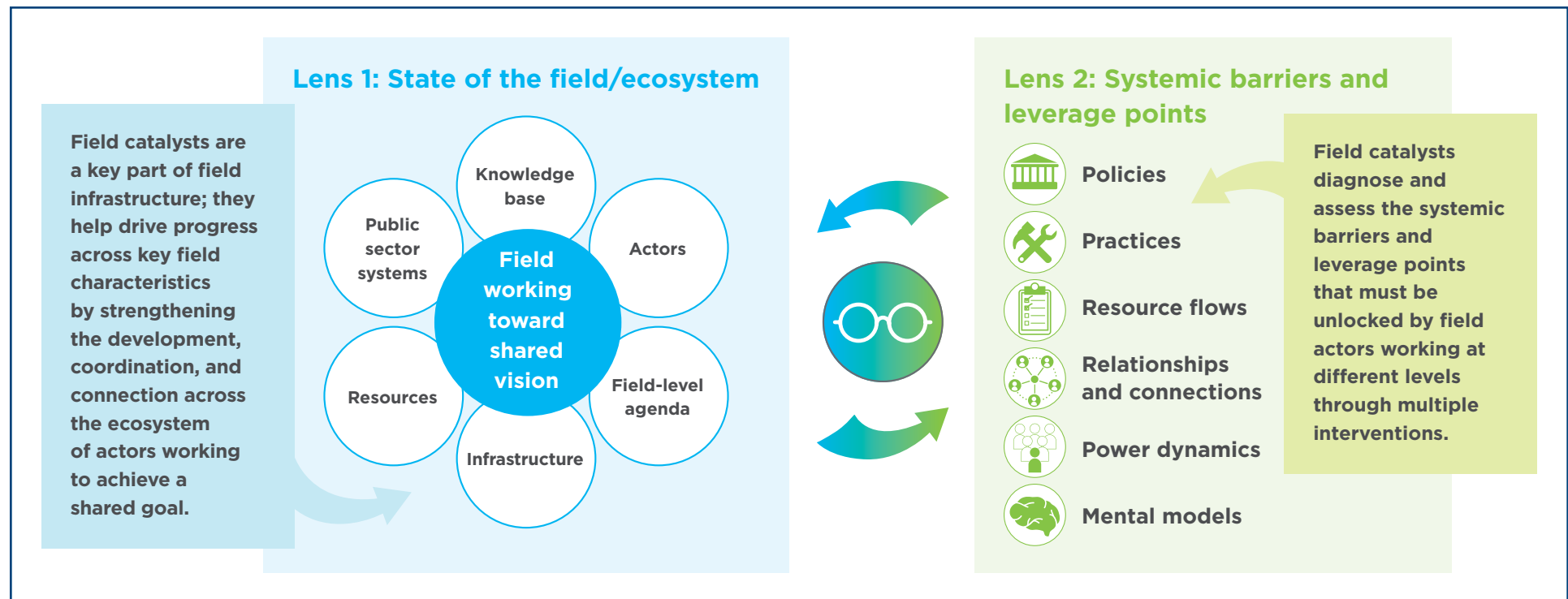
- In the short term, field catalysts can rely on the outputs as well as organizational actions and capabilities named by their theories of change, to signal whether their efforts are on the right track.
- In the intermediate term, outcomes for the field as a whole serve as milestones toward desired impact. These may include progress against the field-level characteristics as well as initial shifts in systemic conditions.
- In the long term, field catalysts track progress toward systemic conditions necessary for equitable population-level change.

How does a theory of change build funder confidence? An effective theory of change helps a field catalyst communicate its vision and articulate how its work contributes. An accompanying MEL approach gives language and structure for field catalysts and funders to learn together about whether these efforts are successful. Together, they make the “nonlinear” work of field building more tangible for funders, making funding field catalysts more approachable.

See the [Appendix](#) for more Bridgespan research and insights on field catalysts and systems change.

Field catalysts approach their work with a “dual lens”— their theories of change focus on **both field development and systems change**

Field catalysts apply a “dual lens”—focusing on the **state of the field/ecosystem** and on **systemic barriers and leverage points**. In field catalyst work, this dual lens is essential, though not always well understood.



The theory of change can help clarify and elevate the importance of the dual lens. The MEL approach can then articulate progress, even when it’s nonlinear, longer term, and the result of multiple contributions from a variety of actors.

Key questions for a field catalyst when building an effective theory of change

1. Define the outcomes you seek

- What is the vision for population-level impact your field aspires to?
- What does success look like?

2. Assess the development of the field and the systems change the field seeks to drive

- What are the systemic conditions that need to change to bring this vision to life (e.g., practices, policies, power dynamics, relationships and connections, resource flows, mental models, etc.)?
- What are the systemic barriers and leverage points?
- What is the state of the field considering key field characteristics (e.g., actors, knowledge, agenda, infrastructure, resources, public sector systems)?
- For each field characteristic, what will it take to accelerate progress?
- Specifically, who are the field actors whose partnership and/or alignment will be critical to achieve the field's vision?

3. Determine your role in contributing to field-level and systems-level progress

- What roles are most critical for you as a field catalyst to take on to enable the field to make progress (i.e., on key field characteristics that together drive shifts in system conditions)?
- What are the primary activities you will undertake to execute on these roles?
- On an ongoing basis, how will you ensure you are able to take stock of field progress, identify emergent needs, and fill critical gaps that are a barrier to the field's progress?

4. Determine what you will measure to track the effectiveness of your contributions and the field's overall progress toward the population-level outcomes you seek

5. Communicate your impact to funders

For a more in-depth primer on theory of change for nonprofits, which field catalysts can adapt for their use, see "[What Are Intended Impact and Theory of Change and How Can Nonprofits Use Them?](#)"

Building an effective theory of change

MEL: What to measure

Communicating with funders

Building an Effective Theory of Change

Measurement, Evaluation, and Learning: What to Measure

Lens 1: State of the field/ecosystem

Lens 2: Systemic barriers and leverage points

Communicating with Funders

Appendix

How a field catalyst can use **measurement, evaluation, and learning** to capture both the state of the field and progress toward systems change

1. **Define the outcomes you seek**
2. **Assess the development of the field and the systems change the field seeks to drive**
3. **Determine your role in contributing to field-level and systems-level progress**

4. **Determine what you will measure to track the effectiveness of your contributions and the field's overall progress toward the population-level outcomes you seek**

- What are the intermediate outputs and outcomes that would indicate the field is strengthening its collective capacity to achieve the population-level outcomes? How will you measure this progress?
- What are the changes in systemic conditions you are watching out for that give you information about the field's progress toward its desired population-level outcomes? How will you measure these indicators?
- How might you iterate over time through consultation with and feedback from the field?

5. **Communicate your impact to funders**

Building an effective theory of change

Measurement,
Evaluation, and Learning:
What to measure

Communicating
with funders

Four established field catalysts and how they assess both progress in the field and systems change



The Campaign for Tobacco-Free Kids and its affiliated 501(c)(4), Tobacco-Free Kids Action Fund, are leading advocacy organizations working to reduce tobacco use and its deadly consequences in the United States and around the world. Through strategic communications and policy advocacy campaigns, the campaign works to change public attitudes about tobacco and promote proven policies that are most effective at reducing tobacco use and save the most lives.



Freedom to Marry was the campaign to win marriage for same-sex couples nationwide. Freedom to Marry's work in driving strategy, coalition-building, government adoption, media campaigns, and philanthropic funding largely contributed to the ultimate Supreme Court victory in 2015, securing the right for same-sex couples to marry.



The RBM (Roll Back Malaria) Partnership to End Malaria is the global platform for coordinated action against malaria. It mobilizes for action and resources, and forges consensus among more than 500 partners, including malaria-endemic countries, their bilateral and multilateral development partners, the private sector, nongovernmental and community-based organizations, foundations, and research and academic institutions. Recognizing country ownership and leadership as the bedrock to ending malaria, the RBM Partnership to End Malaria leads partners in keeping malaria high on the political and development agenda, supporting regional approaches to fight malaria, and advocating for sustainable financing at global and national levels.



Mosaic is a fund and field catalyst that invests in movement infrastructure to boost the collective power of climate, conservation, and environmental health and justice movements in the United States. Launched in 2020 after an 18-month ecosystem-wide design process, Mosaic emerged from the recognition that the pace and scale of environmental challenges are surpassing environmental field actors' collective efforts and that additional investment in movement infrastructure is necessary to bring the field closer to achieving goals of clean air and water, safe climate, and healthy and just communities. Over 100 movement leaders co-designed Mosaic's strategy, and now a diverse rotating leadership council of NGO and grassroots representatives along with funders oversee Mosaic's grant strategy.

These illustrative examples are based on secondary research and years of interviews with leaders from the organizations, including through some advisory engagements.

Each field catalyst has both intended goals (desired measurable impact on any given observable field characteristic or condition of systems change) and indicators of progress (intermediate outputs and outcomes indicating success in pursuit of a goal).

Building an Effective Theory of Change

Measurement, Evaluation, and Learning: What to Measure

Lens 1: State of the field/ecosystem

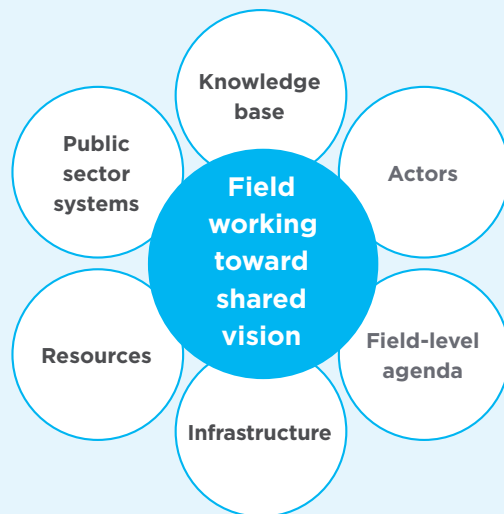
Lens 2: Systemic barriers and leverage points

Communicating with Funders

Appendix

Field catalysts use Lens 1 to explore six observable field characteristics for tracking field development

Lens 1: State of the field/ecosystem



Six observable field characteristics

Knowledge base

The body of academic and practical research that helps actors better understand the issues at hand, and identifies and analyzes shared barriers

Actors

The set of individuals and organizations that together help the field develop a sense of shared identity and common vision

Field-level agenda

The combination of approaches field actors will pursue to address barriers and develop solutions

Infrastructure

The “connective tissue” that enables greater innovation, collaboration, and improvement among a field’s actors over time

Resources

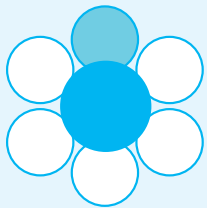
Financial and nonfinancial capital that supports the field’s actors and infrastructure

Public sector systems

The value proposition to and intersections with government actors, infrastructure, and resources

Knowledge base: Shining a light on how well field actors understand their field and the issues it's trying to solve

Observable field characteristics



The body of academic and practical research that helps actors better understand the issues at hand, and identifies and analyzes shared barriers

Sample measures drawn from field catalysts*

- Research is translated for—and used and referenced by—practice and policy audiences
- Publications center the experiences of those closest to the problem
- Examples/“proof points” contribute insights on what it will take to solve the problem at scale

Examples

Campaign for Tobacco-Free Kids

- **Intended goals:** Robust information and data on the state and impact of tobacco use, as well as the tobacco industry's harmful practices are available and inform the field's strategy
- **Indicators of progress:** Published state-specific, national, and global data on tobacco use, as well as US and global information resources on the tobacco industry

Freedom to Marry

- **Intended goals:** Research on marriage informs and supports messaging and campaigns for marriage equality; practical knowledge on effective approaches to drive the marriage movement is scaled nationwide
- **Indicators of progress:** Created the Marriage Research Consortium to share marriage research and knowledge; conducted research to create effective messaging resources

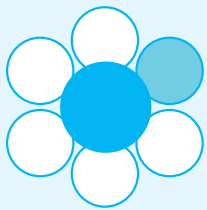
RBM Partnership to End Malaria

- **Intended goals:** Robust base of knowledge and data on malaria worldwide
- **Indicators of progress:** Published a Global Malaria Dashboard, tracking and mapping cases, deaths, risk, and access to treatment around the world

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#). Our original research highlighted five observable characteristics, and as we have continued and deepened our research and work over time, we have elevated a sixth—public sector systems—which we have found may be critical enough in some contexts to merit analyzing and tracking it independently.

Actors: Mapping those in or adjacent to the field to identify who is at and/or needs to be at the table

Observable field characteristics



The set of individuals and organizations that together help the field develop a sense of shared identity and common vision

Sample measures drawn from field catalysts*

- A coalition of actors representing different roles in the field convene and organize to make progress on key initiatives together
- Field actors include those with insight into the problem and potential solutions informed by personal and/or professional experience

Examples

Campaign for Tobacco-Free Kids

- **Intended goals:** Diverse actors, e.g., government, public health partners, corporations, funders, and grassroots and youth advocates working toward reducing tobacco use
- **Indicators of progress:** Partnered with diverse actors to end tobacco sales; ran trainings/programs to support and recognize youth advocates across the country

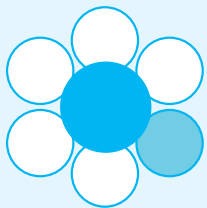
RBM Partnership to End Malaria

- **Intended goals:** Diverse actors mobilize to carry out an inclusive, multisectoral response to control, eliminate, and ultimately eradicate malaria
- **Indicators of progress:** Grew multilateral partnerships to include over 500 members with intentional recognition of malaria-endemic country ownership and leadership

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Field-level agenda: Aligning the field around a shared vision and strategy

Observable field characteristics



The combination of approaches field actors will pursue to address barriers and develop solutions

Sample measures drawn from field catalysts*

- Field has a defined and measurable vision for what it would look like to solve the problem
- Field actors are aligned on a common field-level vision and strategy

Examples

Campaign for Tobacco-Free Kids

- **Intended goals:** Actors nationwide and worldwide are aligned on a goal of/ strategies for reducing tobacco use
- **Indicators of progress:** Participated in negotiations resulting in the adoption of the World Health Organization Framework Convention on Tobacco Control, the first global tobacco control treaty obligating countries to implement evidence-based policies to reduce tobacco use (2003)

Freedom to Marry

- **Intended goals:** There is a clear, sustained strategy guiding the field's progress toward winning the freedom to marry nationwide
- **Indicators of progress:** Developed a clear, three-track strategy (win the freedom to marry in more states, build and grow majority support for marriage, end federal marriage discrimination) based on successful movements (e.g., the movement to win interracial marriage)

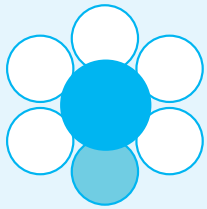
Mosaic

- **Intended goals:** Field actors elevate movement infrastructure as a priority and co-create a strategy to invest in it
- **Indicators of progress:** Engaged over 100+ academic experts and movement leaders to co-design Mosaic's strategy for funding the most critical types of movement infrastructure

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Infrastructure: Processes, structures, and other ways field actors connect, coordinate, and collaborate

Observable field characteristics



The “connective tissue” that enables greater innovation, collaboration, and improvement among a field’s actors over time

Sample measures drawn from field catalysts*

- New relationships are forming across silos (e.g., between researchers and practitioners)
- There are high-quality collaboration “containers” e.g., networks, coalitions, and conventions

The field catalyst itself is part of the infrastructure of the field. Field catalysts serve as a proxy for field development and health, and **four assets of a field catalyst** can help funders assess their development as a key infrastructure organization.

Examples

Campaign for Tobacco-Free Kids

- **Intended goals:** Platforms, coalitions, and convenings enable field actors to collectively work toward reducing tobacco use
- **Indicators of progress:** Operated platforms/coalitions/convenings for collaboration, such as the International Legal Consortium of lawyers and advocates, cultural conversations series as part of the Campaign for Culture, etc.

RBM Partnership to End Malaria

- **Intended goals:** Infrastructure provides venues for information-sharing and collaboration among actors on specialized topics intersecting with malaria, and to address bottlenecks or gaps in impact
- **Indicators of progress:** Operated six working groups for sharing of best practices and collaboration on specialized topics; convened and coordinated malaria-endemic countries, their development partners, the private sector, NGOs and CBOs, foundations, and research/academic institutions around a multiyear co-created Strategic Plan

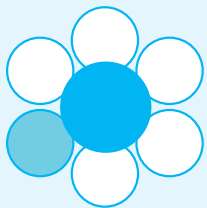
Mosaic

- **Intended goals:** Robust infrastructure for the environmental field that leaders have identified as critical to success—communications and narrative, leadership development, advocacy tools and training, and relationships and trust
- **Indicators of progress:** Invested several million dollars annually in projects to strengthen movement infrastructure; examples include networks of leadership and advocacy trainings, and a community-based online platform organizing data and information for climate, clean energy and a just transition

* For more on the five observable field characteristics, see Bridgespan’s [Field Diagnostic Tool: Assessing a Field’s Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Resources: Ensuring adequate resources for actors and infrastructure in the field

Observable field characteristics



Financial and nonfinancial capital that supports the field's actors and infrastructure

Sample measures drawn from field catalyts*

- A steady donor base is investing in the field's actors and infrastructure (number of donors, dollars granted)
- Key funders are serving as champions for the field's work and elevating the field's work with peers to draw in more resources

Examples

Campaign for Tobacco-Free Kids

- **Intended goals:** Leverage relationships with peers and other key funders to increase c4 funding to achieve advocacy goals
- **Indicators of progress:** Influenced funders and peers to fund c4 efforts and established the Tobacco-Free Kids Action Fund to meet the needs of the field

RBM Partnership to End Malaria

- **Intended goals:** International and domestic financial resources prioritized and optimized for malaria response; new financing channels opened (dollars secured)
- **Indicators of progress:** Advised the Global Fund on malaria and catalytic funding allocations, securing \$279 million for essential service coverage gaps in 2019

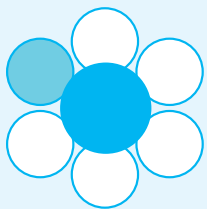
Mosaic

- **Intended goals:** Funding is mobilized and distributed to organizations and projects that strengthen movement infrastructure in the climate, conservation, and environmental health and justice fields
- **Indicators of progress:** Opened four national RFPs to date (annual); since 2020, has invested \$26 million in 357 uniquely collaborative grants that support more than 660 co-applicants and 5,700 benefiting organizations across the country; will distribute \$6 million for the 2025 RFP

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Public sector systems: In many contexts, change can only happen through engagement with government actors, infrastructure, and resources

Observable field characteristics



The value proposition to and intersections with government actors, infrastructure, and resources

Sample measures drawn from field catalysts*

- The field clearly understands the intersections with government programs and impact of those intersections
- There is a broad and deep set of relationships within relevant policy and administrative structures that share commitment

Examples

RBM Partnership to End Malaria

- **Intended goals:** Cultivate champions for ending malaria within malaria-affected country governments
- **Indicators of progress:** African government ministers sign commitment to end malaria

Freedom to Marry

- **Intended goals:** Unlock systems of financial support that had excluded same-sex partners
- **Indicators of progress:** Analysis of the economic burden of marriage discrimination

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Building an Effective Theory of Change

Measurement, Evaluation, and Learning: What to Measure

Lens 1: State of the field/ecosystem

Lens 2: Systemic barriers and leverage points

Communicating with Funders

Appendix

Field catalyts can also use Lens 2, the system lens, to capture longer-term indicators of progress toward systems change

Lens 2: Systemic barriers and leverage points



Policies



Practices



Resource flows



Relationships and connections



Power dynamics



Mental models

Conditions of systems change

Policies

Government, institutional, and organizational rules and priorities that guide the entity's and others' actions

Practices

Espoused activities of institutions, coalitions, networks, and other entities targeted to improve social progress, and the procedures, guidelines, or informal shared habits that comprise their work

Resource flows

How money, people, knowledge, information, and other assets 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 influence among individuals and organizations

Mental models

Habits of thought—deeply-held beliefs, assumptions and taken-for-granted ways of operating that influence how we think, act, and talk

Policies: Changing the rules that guide action to incentivize and enable the intended goals

Conditions of systems change



Government, institutional and organizational rules and priorities that guide the entity's and others' actions

Sample measures drawn from field catalyts*

- Policy cohorts, number of systems leaders/decision makers advised
- Key mentions and policies include and value issue area; all are informed by the field's work
- Policies adopted and/or undesired policies blocked or overturned

Examples

Campaign for Tobacco-Free Kids

- **Intended goals:** In the United States and globally, governments adopt tobacco control policies that reduce tobacco use and save lives (number of policies, lives impacted)
- **Indicators of progress:** In the United States, examples of major advocacy wins include: passage of the Tobacco Control Act (2009) granting FDA the authority to regulate tobacco products, Congress raising the tobacco age to 21 nationwide (2019), lawsuits against the tobacco industry/federal government (Master Settlement 1998, Big Tobacco Racketeers 2006)

RBM Partnership to End Malaria

- **Intended goals:** Countries/governments affected by malaria have and implement effective malaria responses/programs to eliminate and prevent the re-establishment of malaria (35 more countries eliminated by 2030, versus by 2015)
- **Indicators of progress:** Examples of progress include: supported countries in convening the private healthcare sector in existing platforms or bodies that govern/coordinate the design, implementation, and monitoring of malaria responses

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Practices: Identifying and implementing the activities that key actors need to contribute

Conditions of systems change



Espoused activities of institutions, coalitions, networks, and other entities targeted to improving social progress, and the procedures, guidelines, or informal shared habits that comprise their work

Sample measures drawn from field catalysts*

- Progress data released monthly by government (for accountability and to inform decisions)
- Key institutions (e.g., hospitals) implement new procedures to align with shifts in policy (e.g., to screen for social determinants/drivers of health)
- Practitioners in public systems (e.g., teachers) are trained and report being able to implement new tools and resources in their practice (e.g., new curriculum and instructional materials)

Examples

Mosaic

- **Intended goals:** Environmental policies move resources quickly to maximize climate, environmental, and community benefits, and no community bears disproportionate burdens during the roll-out of these policies
- **Indicators of progress:** \$16 million in grantmaking from 2023-2024—including aligned and pooled funding—equipping organizations with the tools needed to implement and leverage the benefits

of recent policies (e.g., the Inflation Reduction Act), and strengthen the movement for the long term; catalyzed and funded regional mobilizing and coordinating hubs in key regions with greenhouse gas reduction potential that are helping communities draw down public climate funding; shared a resource library to support groups in finding and accessing technical support and funding opportunities

Campaign for Tobacco-Free Kids

- **Intended goals:** Medical institutions and doctors change practices around tobacco cessation questions and counseling with patients
- **Indicators of progress:** Achieved standardization of questions around tobacco use and use of data-backed interventions to support cessation

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Resource flows: Ensuring all key actors and activities have the support they need

Conditions of systems change



How money, people, knowledge, information, and other assets are allocated and distributed

Sample measures drawn from field catalyts*

- Shifts in public funding flows (e.g., school funding formulas to enable resource equity)
- Funding to organizations serving historically marginalized groups
- Change in funder diligence and grantmaking practices

Examples

Campaign for Tobacco-Free Kids

- **Intended goals:** Funding is mobilized and distributed for advancement of tobacco control/reduction of tobacco use especially among children, young people, and other high-risk populations
- **Indicators of progress:** Health insurance funded and run by the federal government, which is more likely to cover higher risk populations, cover comprehensive tobacco cessation benefits

RBM Partnership to End Malaria

- **Intended goals:** Financial and technical resources and support are provided to countries with significant gaps in essential services for malaria (dollars mobilized)
- **Indicators of progress:** Provided assistance to high burden countries in mobilizing resources for their malaria programs, e.g., in 2019 RBM helped Nigeria develop proposals—\$200 million World Bank proposal and \$100 million Islamic Development Bank proposal approved in 2020

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Relationships and connections: Building the bridges among key actors, particularly across lines of difference, that enable action

Conditions of systems change



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

Sample measures drawn from field catalysts*

- Cross-sector partnerships or collaborations
- Global communities represented in convenings, coalitions, and networks
- Increased collaboration and communication across government, private sector, and civil society

Example

RBM Partnership to End Malaria

- **Intended goals:** Increase collaboration across government, private sector, and civil society to end malaria in malaria-endemic countries
 - **Indicators of progress:** The RBM Partnership to End Malaria includes over 500 partners across international NGOs, local governments, businesses, health organizations, researchers, etc.
- Many of these partners are a part of RBM's three Partner Committees and/or six Working Groups to collaborate on specific topics/issues within the effort to end malaria globally

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Power dynamics: Disrupting existing power and influence to enable representation and ownership by those least well served by the system today

Conditions of systems change



The distribution of decision-making power, authority, and influence among individuals and organizations

Sample measures drawn from field catalysts*

- Voter turnout/political engagement for (Native, Black, etc.) peoples
- Representation of historically marginalized groups in governance and leadership
- Civil rights cases won

Examples

Mosaic

- **Intended goals:** Participatory grantmaking empowers actors doing the work in the environmental movement to drive resource allocation

- **Indicators of progress:** Put in place a diverse rotating governance with a super-majority of NGO and grassroots representatives, working together with funder participants, to inform and approve grantmaking strategy

Freedom to Marry

- **Intended goals:** Legally end federal marriage discrimination
- **Indicators of progress:** Organized and coordinated court cases across multiple states alongside growing public support (culminating in Obergefell ruling in the Supreme Court)

* For more on the five observable field characteristics, see Bridgespan's [Field Diagnostic Tool: Assessing a Field's Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Mental models: Reframing what we imagine to be possible; changing beliefs and assumptions presenting barriers to change

Conditions of systems change



Habits of thought—deeply-held beliefs, assumptions, and taken-for-granted ways of operating that influence how we think, act, and talk

Sample measures drawn from field catalysts*

- Public engagement with movement, views/media mentions, and narrative change
- Reduced public stigma, e.g., by public opinion polls
- Demonstrations of support or increase in public support

Examples

Campaign for Tobacco-Free Kids

- **Intended goals:** Increase public awareness and support for the tobacco cessation movement (volume/quantity of engagement)
- **Indicators of progress:** One campaign (Why We Should Care) had 50,000 youth engagements and shared 171,000 conversation guides

Freedom to Marry

- **Intended goals:** Create narrative change to foster the climate necessary to enable state and national wins (% support for marriage equality in national polls vs benchmark 70% opposition at the time of the 1967 Loving Supreme Court case)
- **Indicators of progress:** Research-based media campaigns and public education efforts successfully influenced public opinion; by 2015, national polls found 63% of Americans in support of the freedom to marry, an increase from 27% in 1996 (the year of the first state win in Hawaii)

RBM Partnership to End Malaria

- **Intended goals:** Increase public awareness and advocacy for eradicating malaria; malaria remains high on the global health and development agendas
- **Indicators of progress:** Ultimately shifted the global mental model from “rolling back” malaria incidence to full eradication—a massive goalpost shift

* For more on the five observable field characteristics, see Bridgespan’s [Field Diagnostic Tool: Assessing a Field’s Progression](#) and insights from [Field Building for Equitable Systems Change](#).

Putting it all together: Continuous learning and iteration in partnership with other field actors

While the questions and examples on the previous pages are designed to serve as a guide for the development of field catalysts' theories of change and MEL approaches, our study and engagement with many leading field catalysts indicate that the process of doing so involves several decisions and ongoing learning and iteration with the field:

There are several key decisions in designing your theory of change and MEL approach, including:

- What to prioritize in the theory of change (e.g., what activities will be most important to drive near-term results? What will you take on as a field catalyst?)
- Which measures are best fit to assess progress against the theory of change, including what is an “output” vs “intermediate outcome” vs “long-term outcome” (or whatever language you decide to use for these measures of progress and impact)

These decisions should be informed by the state of the field, what the actors in the field believe will most drive impact, and which measures are valuable to the field.

Field catalysts are constantly assessing the progress the field is making, learning what is working and where the challenges are, and updating their perspectives about where further investment or activity is required to unlock impact (theory of change) and what measures are most appropriate to assess impact and inform the field's work going forward.

Many field catalysts have developed both formal and informal processes to do this. Some examples of formal processes include:

- Annual or quarterly convenings
- Regular calls with a variety of field leaders
- Monthly working group calls
- Surveys of field actors

These help them deepen relationships, assess progress toward indicators of success across Lens 1 and Lens 2, and re-prioritize activities.

Building an Effective Theory of Change

Measurement, Evaluation, and Learning: What to Measure

Lens 1: State of the field/ecosystem

Lens 2: Systemic barriers and leverage points

Communicating with Funders

Appendix

How to use your theory of change and MEL as tools for communicating impact and increasing funder confidence

1. **Define the outcomes you seek**
2. **Assess the development of the field and the systems change the field seeks to drive**
3. **Determine your role in contributing to field-level and systems-level progress**
4. **Determine what you will measure to track the effectiveness of your contributions and the field's overall progress toward the population-level outcomes you seek**

5. **Communicate your impact to funders**

- Challenges in communicating field catalysts' impact and theories of change to funders
- Emerging best practices and examples of field catalysts leveraging their theories of change as a tool for communicating impact and increasing funder confidence
- Examples:
 - Community Solutions
 - Liberation Ventures

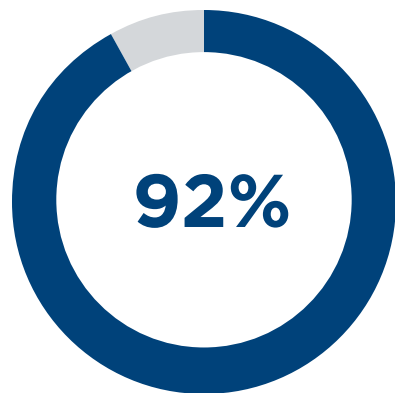
Building an effective
theory of change

MEL: What to measure

Communicating
with funders

Polling of field catalysts has revealed pain points in communicating impact and theories of change to funders

Field catalysts see value in using their theories of change as tools for communicating to funders, and there is a need for greater definition of what a strong theory of change looks like for field catalysts



92% of respondents felt that funders don't understand their theory of change or impact as a **field catalyst**, which may have led to funders not funding their work

However, many field catalysts feel unequipped to walk funders through their theories of change



Emerging practices that use theories of change to bring funders along

Theory of change: A foundation for communicating impact

A theory of change supports a field catalyst in communicating impact by laying out what system-level shifts are necessary to reach its ultimate goal, how the field's progress will influence these shifts, and how the field catalyst's work will contribute to the field



Create a compelling case for change

Engage funders to clearly articulate aspirations for population-level impact, including why this work is urgent and requires a different approach



Make it tangible

Help funders understand what this kind of work looks like and requires by connecting aspirations to tangible milestones; share examples of what this work looks like in practice



Educate and share rationale

Support funders' learning, sharing data, insights, and rationale for strategic approaches (and shifts) being taken



Engage and elevate

Meet funders where they are and elevate their experiences and influence to shift the broader field

Community Solutions, a field catalyst working to create a lasting end to homelessness, communicates its “Built for Zero” movement in a way that works for funders



Identifies a clear point of arrival to make the work tangible

Creating a shared definition of the right end state

The first step to solving homelessness is having a shared definition of what we are trying to achieve. Communities in Built for Zero use [functional zero](#), a milestone that indicates that homelessness is measurably rare and brief for a population. They often work to achieve functional zero for various target populations (veteran, chronic, family, youth, all singles) as steps on the way to making homelessness rare and brief for everyone. This dynamic milestone enables communities to continuously confirm whether they are driving homelessness toward zero.

LEARN MORE ABOUT FUNCTIONAL ZERO



Creates a compelling case for change, connecting back to their population-level north star: that “homelessness is rare over all and brief when it occurs”

THE PROBLEM



Funders evaluate success on the performance of individual housing programs, not on whether a community collectively reduces homelessness. But single programs don't get us to zero — whole communities do.

OUR SOLUTION



Community-level measurement. Success is measured by the total number of people experiencing homelessness, not by program outcomes. Data enables communities to rapidly test new ideas and understand if those efforts are working.



Meets funders where they are, acknowledging that funders in the homelessness space often do not have a line of sight into community-level change



Educates and shares rationale, making the case that their field-strengthening approach can measurably change the system

Liberation Ventures, aiming to realize racial repair in the United States, breaks down a complex movement into three clear pieces with proof points and data. Here is one.

Liberation Ventures accelerates the Black-led movement for racial repair.

Liberation Ventures is building a multiracial democracy that works for all of us – by making racial repair a reality in the United States. We are realizing a dream in our name, where reparations for Black people unlocks true belonging for us all.



Puts their north star front and center to create a compelling case for change



01 Mobilizing Abundant Resources

We invest in organizations that accelerate the reparations movement & co-create grantmaking strategies with practitioners in the field.

- Since 2021, we have moved \$6.5M to 40+ organizations. The organizations we fund are led by people of all races, and demonstrate accountability to Black communities.
- LV's approach to grantmaking is relational, streamlined, & designed to lift as much of the burden as possible – we opt for calls and collaborations instead of proposals and reports.
- Learn more about our [2022](#), [2023](#), and [2024](#) movement partners.



Makes the work tangible by naming clear milestones



Transparently shares insights and data to educate funders and supporters



Shares rationale for their strategic approach

Building an Effective Theory of Change

Measurement, Evaluation, and Learning: What to Measure

Lens 1: State of the field/ecosystem

Lens 2: Systemic barriers and leverage points

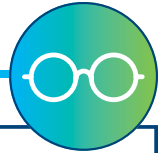
Communicating with Funders

Appendix

Bridgespan's research and insights on field catalysts and systems change

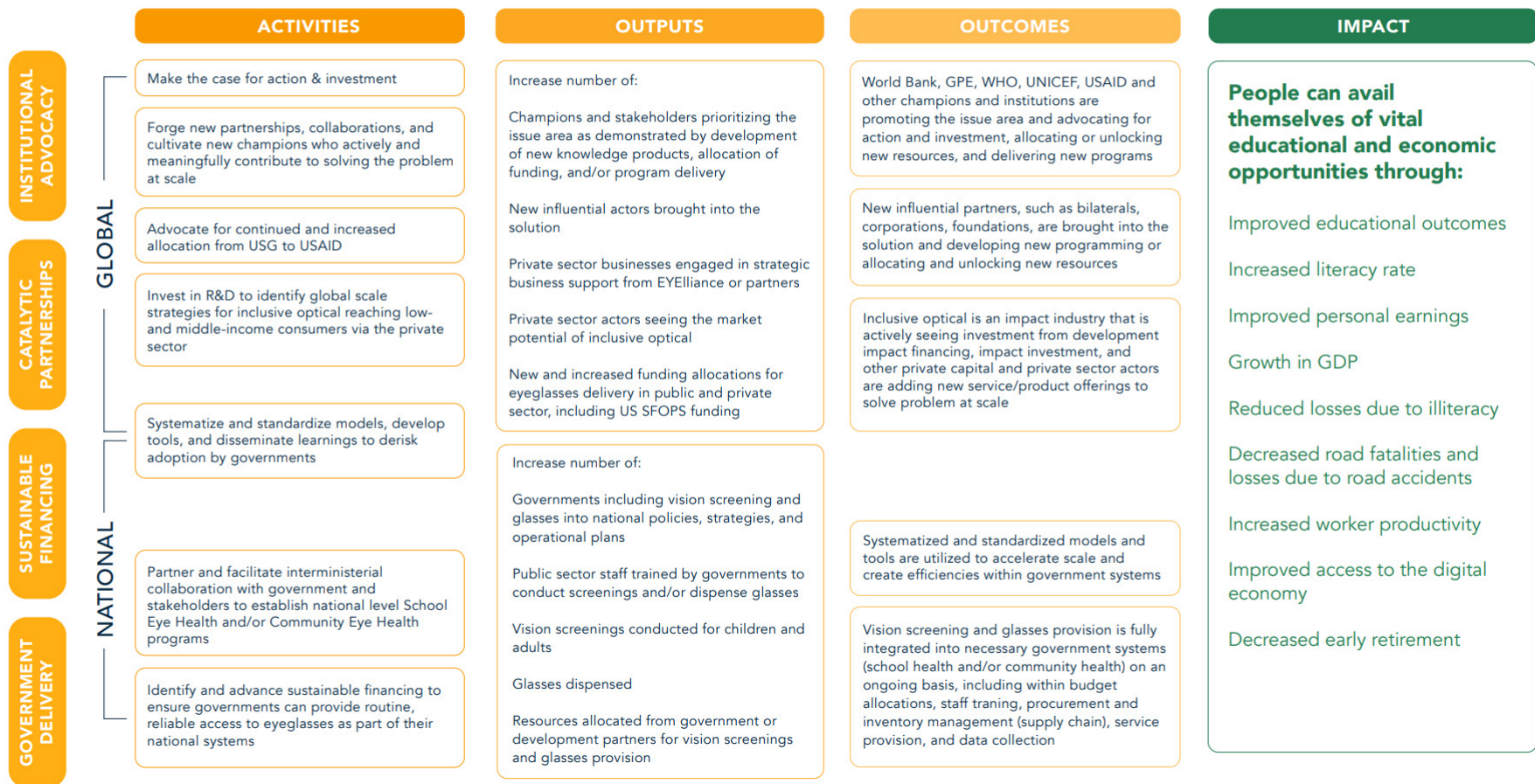
- Overview of field building as an approach to equitable systems change, including implications for philanthropy: [*Field Building for Population-Level Change*](#)
- [Field Diagnostic Tool](#) to help funders and field leaders analyze their own field and what it will take to unlock progress
- Early analysis of field catalysts as a nonprofit intermediary type: [How Field Catalysts Galvanize Social Change](#)
- Deeper dive into the distinctive assets that field catalysts bring to equitable systems change work and the roles they play in the field: [How Philanthropy can Support Systems-Change Leaders](#)
 - The accompanying [due diligence guide](#) suggests how funders can “see” more clearly the ways that distinctive field catalyst assets manifest in potential grantees
- Field catalyst origin stories, unique challenges they face, and implications for philanthropy: [*Funding Field Catalysts from Origins to Revolutionizing the World*](#)
- Impact measurement: [What Philanthropists Can Learn from Field Catalysts About Measuring Progress on Systems Change](#)

Example: EYElliance's theory of change shows how a field catalyst/systems orchestrator can apply a "dual lens"



Projected 10-year Impact: Routine, Reliable Access to Glasses For 260M Adults and 88M School Children Living in 22 Countries

THEORY OF CHANGE



Continued on the [next page](#) ▶

How EYElliance’s theory of change applies a “dual lens” in their work...

1 EYElliance works to strengthen the development, coordination, and connections of the **ecosystem** of actors, including businesses, governments, and NGOs, working to achieve a shared goal of routine, reliable access to glasses

2 EYElliance diagnoses and assesses the systemic barriers and leverage points that must be unlocked by field actors, such as streamlining government policies and practices for eye care and unlocking resource flows from private actors



3 This dual lens enables EYElliance to accelerate collective progress toward addressing the root causes of the lack of universal access to eyeglasses

4 Ultimately, EYElliance’s efforts support all actors to achieve its goal for equitable, population-level change—universal reliable access to eyeglasses, that implies further resulting impacts