



May 2023

SERN'S STORY

Reflections from a Strategic Sunset

This piece was authored by Molly Watkins and draws on documentation provided by Student Experience Research Network (SERN), conversations with SERN staff and partners, and a third-party assessment of SERN's impact.

When Student Experience Research Network announced in September 2022 that it was beginning a strategic sunset, many of its partners were both surprised and disappointed. SERN had become a valuable field-builder and a go-to resource for the growing body of evidence showing that how students make meaning of their experiences in school – and whether they feel respected as valued people and thinkers – influences their learning and well-being.

SERN invested in the leadership of researchers doing practically relevant, interdisciplinary, and equity-centered scholarship and along with its partners, put the concept of student experience “on the map,” in that a wider set of influential education leaders, funders, and researchers now see student experience as connected to their work and feel responsible for stewarding it forward. It also built capacity among practitioners, policymakers, and funders to apply insights from this research to their work. And it facilitated new relationship-building among these education sector actors and researchers. But it was SERN's commitment to being informed by the field and consistently evolving to advance it – one of the key traits of a field catalyst – that contained the seeds of both its outsized impact and its eventual sunset.

Catalyzing a Field

SERN didn't set out to be a field catalyst when it was launched in 2015. The designation hadn't been identified yet. The early focus of the organization was to facilitate large-scale interdisciplinary studies of mindset interventions. But SERN's field-informed evolution and the particularity of its journey demonstrates how it became a field catalyst over time and how that approach impacted how it changed the field, and when, why, and how it decided to conclude its operations.

According to The Bridgespan Group's [research on field catalysts](#), “equitable systems change requires a diverse set of actors playing distinct and complementary roles across a field or ecosystem.” Field catalysts like SERN “harmonize and drive that multifaceted work, serving as a kind of nerve center for the matrix of activity needed to transform our inequitably designed systems.”¹ Unlike traditional direct service or advocacy organizations, field catalysts are not interested in scaling programs or organizations. Instead, they focus on large-scale impact by brokering relationships, coordinating learning and information-sharing, and facilitating shared strategies and goals across actors throughout the ecosystem.

The Bridgespan Group finds that “most field catalysts use adaptive strategies and often learn their way toward equitable systems change.” To measure impact, these organizations rarely use traditional metrics, instead “[relying] on a varying set of indicators to gauge if the conditions holding inequities in place have shifted.” These indicators

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— THE BRIDGESPAN GROUP

include “changes in policy and institutional practices, the strengthening of relationships and networks among stakeholders across the field, or the changing of narratives and shifting of mindsets.”²

Like many field catalysts, SERN evolved throughout its lifespan, starting in its first year, but this constant evolution came with challenges, including funding its growing programmatic work, all while holding an increasingly large and diverse coalition together in service of educational equity. SERN effectively managed these tensions over the years of its existence, but because much of what it takes behind-the-scenes to advance this kind of work was not entirely visible to its community, SERN's decision to sunset in the wake of receiving the largest grant in its history took many in its community by surprise.

^{1,2} Farnham, L., Nothmann, E., Crouch, K., & Daniels, C. (2023). Equitable Systems Change: Funding Field Catalysts from Origins to Revolutionizing the World. The Bridgespan Group. <https://www.bridgespan.org/insights/funding-field-catalysts>

The Decision to Sunset

Some clouds had appeared on the horizon by mid-2020, as SERN was finalizing its new strategy. A global pandemic created urgent challenges for schools alongside a massive racial justice uprising in the United States that shined a light on just how far education systems needed to go to address long-standing inequities and effectively serve an increasingly diverse student body. And philanthropy's priorities changed to meet these challenges more directly. Many funders moved outside their dedicated strategies to make emergency response grants to attend to immediate needs among students and families, and the schools and organizations supporting them. Some also funded grassroots organizing and other community-level work to contend with the politicized backlash to schools' efforts to create more equitable learning environments.

SERN's 2020-2023 strategy responded to this broader context. The strategy placed increased emphasis on synthesizing and disseminating research on student experience to support decision-making by institutional and system leaders. It also focused on relationship-building and engagement between researchers and education intermediaries to build and apply practically relevant knowledge. Given pandemic-induced shifts in funding priorities, SERN focused on less financially intensive ways it could support new academic research.

By late 2021 and early 2022, SERN had learned more about what it would take to do the work it set out to do in response to field demands in 2020, and it was going to be challenging. SERN was staffed for a different time. And the challenges of meeting the interests of an increasingly heterogeneous researcher community got more difficult as SERN's work evolved. It was during this time when SERN

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received its largest gift to date, \$4 million from the philanthropist MacKenzie Scott. And while the grant was undoubtedly good news, it didn't make up for the fact that some of SERN's current and potential funders in education philanthropy anticipated a drop off in funding for academic scholars and their research given strategic shifts and the broader financial climate. Because of this, SERN was losing the important tool of strategic re-granting that it used to cultivate a larger and more diverse community of scholars conducting practically relevant research on student experience and to connect those scholars with other education actors.

SERN's executive director, Lisa Quay, illuminated some of these concerns with SERN's board and funders in early March 2022. It had been two years since SERN had last engaged in a systematic process of gathering input from the field as part of its 2020 strategy development and she felt it was time to do so again. The Scott grant only underlined her desire to connect with field actors and understand their needs to determine how SERN could make the changes necessary to meet them. A sunset of the organization was not being contemplated as these conversations began.

SERN conducted this round of field engagement with research, practice, policy, and philanthropic actors in the spring of 2022. It quickly became clear, thanks to the work of SERN and others, how the field had shifted. The student experience lens was firmly in place for SERN's partners, including funders, and many were moving their strategies further downstream to integrate that lens into their work in schools. The pandemic and the racial justice uprising only accelerated this trend.

In short, the field was asking for more from SERN: more of the valued work it had done to date, as well as new and evolved streams of work that were needed as the field increasingly sought to implement student experience-focused shifts in practice and policy. As a result, SERN would need to restructure itself and expand its staffing and organizational capabilities, and to do so would require significantly more funding at a time when the long-term funding prospects for its work were weaker than they had been historically. While the Scott grant could have enabled some of the necessary changes in the short term, it would not address long-term financial sustainability as it was a one-time gift.

SERN was also grappling with organizational capacity issues that are common among field catalysts given the complex and dynamic nature of field-building work.³ The pandemic and shifts in the education sector had ratcheted up this complexity. Growing the organization would have entailed major new investments in hiring, talent development, organizational infrastructure, new

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programming, and fundraising for a team that was already stretched and had evolved significantly in recent years.

SERN evaluated various scenarios for continuing and modeled the organizational and financial implications of each and concluded that it was not poised to successfully carry out the growth and evolution being demanded by the field, including relative to others in the sector. But rather than just close its doors, SERN wanted to be a field catalyst until the end – disbursing its assets in a targeted and strategic way in order to help seed the work the field was demanding, elevate the leadership of those who would lead the work in the years to come, and share takeaways from its work in ways that others could learn from.

³ Farnham, L., Nothmann, E., Crouch, K., & Daniels, C. (2023). Field Catalyst Origin Stories: Lessons for Systems-Change Leaders. The Bridgespan Group. <https://www.bridgespan.org/insights/field-catalyst-lessons-for-systems-change-leaders>



How SERN Conducted its Sunset

SERN'S STORY

The staff, other than the executive director and chief of staff, were not aware that a sunset was being contemplated and they were told of the decision nearly two weeks before the public announcement was made. The goal was to give staff time to absorb the news privately and decide what role they wanted to play, if any, in the sunset work before the news was public. Regardless of what they decided, staff were provided generous financial assistance and career support for their transitions.

GUIDING PRINCIPLES AND PRIORITIES

Once the decision to sunset had been made in June 2022, the board and SERN leadership agreed on guiding principles for the process. Their overarching goal was to seed capacity in the field to continue to push the education system to center student experience. In doing so, they wanted to lead with generosity and clarity. They wanted to be as clear as possible with staff and SERN's partners in the field about why this was happening and what was to come. And they wanted to honor the SERN team and their contributions by celebrating them and supporting their ability to make meaningful career transitions.

The priorities SERN put to itself as it sunset included:

1. Investing SERN's assets to support and elevate others well-poised to lead work on the field's priorities and draw more people and organizations into the field.
2. Using SERN's positioning and financial assets to draw in new and/or additional funding to support work on field priorities.
3. Collecting and disseminating SERN's knowledge to share transferrable lessons learned with the broader field.
4. Celebrating the SERN team, scholars, and partners, and inspiring people to continue to expand upon what SERN started and take up the next phase of work demanded by the field.

Based on these goals and lessons from other organizations that had sunset, SERN determined it would sunset its operations by the end of May 2023 – allowing roughly nine months from publicly announcing the sunset in early September 2022 to design and carry out its final phase of work.

GATHERING INPUT AND OPERATIONALIZING A PLAN

SERN's executive director and chief of staff drew on input from the spring 2022 field conversations, as well as what the SERN team had learned from its field engagement over the past year, to inform the selection of a set of projects it would conduct during the sunset period. Project selection also factored in the need to completely spend down SERN's financial assets within a set of constraints about how and when those funds could be used, and the fact that staff may not choose to stay on during a sunset context. The SERN team subsequently gathered input after the sunset was announced to inform the design of these projects, from sources including an October 2022 survey of SERN scholars, additional input from policy and practice experts, and informal conversations at research conferences during fall 2022.

As part of announcing the sunset internally in late August, the executive director shared with the team a document that outlined high-level visions and staffing for all current and new sunset projects. These were preliminary and designed to help staff decide between two or three different options for when they would depart SERN. In mid-September 2022, after everyone had chosen their departure date, the executive director built out the plan with revised staffing, high-level objectives, decision-making roles, and major milestones. The design of each project was then informed by the team's experience and input gathered from touch points with SERN partners during September and October.

The team held a working session in October 2022 to share how each person was envisioning the pieces of work they were leading, gather input from their

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colleagues, and coordinate external communications and engagement across the projects to ensure that partners continued to have a coherent and intentional experience of their engagement with SERN throughout the sunset. From there, each project lead developed their workplan and budget. So, while the volume of work was large and the timeline finite, many of the foundational processes SERN had developed to design, execute, and incorporate input on projects and manage external relationships in the past enabled the team to move quickly and with confidence from the announcement of the sunset to implementation.

SUNSET PROGRAMMING

SERN carried out the following programming in line with its priorities for the sunset.

Priorities 1+2

Investing SERN's assets to support and elevate others well-poised to lead work on the field's priorities and using SERN's positioning and financial assets to draw in new and/or additional funding to support this work.

SERN provided \$3.1 million through a request for proposals (RFP) for 12-month projects to advance research-focused knowledge-building, relationship-building, and action initiated by research, practice, and policy actors in education committed to supporting students' experience of respect as valued people and thinkers in schools. One of the goals for this portfolio was to help seed earlier stage work that could be refined and built out over time and could draw in funding by others later. SERN opened the program to its past partners across research, practice, and policy to continue to invest in their leadership of the work going forward and their ability to cultivate new partnerships in the field. SERN received a large, high-quality pool of proposals that were diverse along multiple dimensions, featured numerous partnerships across research and practice/policy, and far outstripped the funds it had to disburse, indicating a strong demand for opportunities of this kind and providing another indication of how the field shifted during SERN's existence.

In many ways, the portfolio is a fitting culmination of SERN's work. The organization approached the development of the RFP in much the same way that it approached its other recent initiatives, which focused on co-construction and responsiveness to

participants, as well as bridging and field-building toward equitable systems change. The vast majority of proposals focused on shifting practices, policies, and norms, not individual students' mindsets, in line with the evolution in SERN's focus over the years. The proposals had breadth across the three strands of work identified in the RFP: policy-focused research knowledge-building; resource development for policy and practice audiences; and agenda-setting, alignment, and documentation. The reviewers were heartened that the funded proposals touched on all the priorities SERN outlined for the portfolio based on future field needs. A number of the proposed projects took up similar types of functions that SERN served in the field.

The portfolio also demonstrates the value of field-level intermediaries strategically re-granting philanthropic funds. The project leads in both the overall proposal pool and the group of awarded projects were highly diverse in terms of race and ethnicity and gender, due to SERN's multiyear relationship-building with a diverse pool of partners, and SERN was able to use its content knowledge to recruit a strong group of external reviewers and re-grant in targeted ways that encouraged earlier-stage work that might not be funded in many typical funding processes. (See the following pages for a list of project titles and project leads.)

Additionally, SERN partnered with the Spencer Foundation and the Chan Zuckerberg Initiative on a convening that the Spencer Foundation hosted in May 2023 focused on student experience and measurement in K-12 education – a high-priority topic among the various audiences SERN engaged. This partnership is intended to connect a larger group of actors in the field across research, practice, policy, and philanthropy, and draw in additional funding to contribute to the next generation of practically relevant research on the topic.

PROJECTS IN THE SERN SUNSET GRANT PORTFOLIO

A Participatory Approach to Developing a Healing Justice Framework and Assessment Tools for Schools and Youth Programs

Ben Kirshner, Project Lead

Alexis Hunter, Co-Lead

Solicia López, Co-Lead

Organizational affiliation(s):

University of Colorado

Agenda-Setting for Systems Transformation: Applying Lessons Learned from the Handbook of Research on Teachers of Color and Indigenous Teachers in Policy and Practice

Conra D. Gist, Project Lead

Travis J. Bristol, Co-Lead

Justin Coles, Co-Lead

Cherise McBride, Co-Lead

Organizational affiliation(s):

University of Houston, National Center for Research on Educator Diversity; University of California, Berkeley; University of Massachusetts, Amherst

Back to the Future: Recentering Positive Youth Development and Youth Thriving

Karen Pittman, Project Lead

Organizational affiliation(s):

Knowledge to Power Catalysts

Building Capacity for Research and Policy on Servingness: A Student-Centered Research Agenda

Rebecca Covarrubias, Project Lead

Organizational affiliation(s):

University of California, Santa Cruz

Centering Civil Rights Protections to Support Equitable Student Experiences: An Agenda-Setting and Research Prioritization Proposal to Advance Equity-Focused Student Experiences in the United States

Maithreyi Gopalan, Project Lead

Erica Frankenberg, Co-Lead

Organizational affiliation(s):

The Pennsylvania State University

Conceptualizing and Cultivating the Hispanic-Serving Institution Research Colectiva

Marcela G. Cuellar, Project Lead

Rebecca Covarrubias, Co-Lead

Gina A. Garcia, Co-Lead

Organizational affiliation(s):

University of California, Davis; University of California, Santa Cruz; University of Pittsburgh

Connecting Assessments and Best Practices for Improving Student Experiences

Nancy Duchesneau, Project Lead

Organizational affiliation(s):

The Education Trust

Designed for Equity: A New Inclusive Model for Institutional Transformation Centering the Student Experience and Postsecondary Outcomes

Mary C. Murphy, Project Lead

Sara Woodruff, Co-Lead

Organizational affiliation(s):

Equity Accelerator, National Center for Civic Innovation

(Continued)

PROJECTS IN THE SERN SUNSET GRANT PORTFOLIO

(Continued)

Effects of Historically Black Colleges and Universities on Academic Outcomes Using Quasi-Experimental Design

Dominique Baker, Project Lead

Thomas Dee, Project Lead

Organizational affiliation(s):

Southern Methodist University; Stanford University

Examining Anti-Racist Restorative Justice as a Site of Black Education Transformation: A Possibilities Project Case Study

Chezare Warren, Project Lead

Carla Wellborn, Co-Lead

Organizational affiliation(s):

Vanderbilt University

Institutional Opportunities to Belong: A Playbook for Putting Middle Schoolers' Policy Insights into Motion

DeLeon Gray, Project Lead

Shiyan Jiang, Co-Lead

Organizational affiliation(s):

North Carolina State University

Research to Practice and Policy Collaborations: Leveraging Evidence in Pursuit of Equity in Education

Francesca López, Project Lead

Lorén Cox, Co-Lead

Ross Wiener, Co-Lead

Organizational affiliation(s):

The Pennsylvania State University; Aspen Institute

Resources for Educators Engaged in Continuous Improvement to Create Equitable Learning Experiences

Sarah Gripshover, Project Lead

David Paunesku, Co-Lead

Organizational affiliation(s):

PERTS (Project for Education Research That Scales)

School Disciplinary and Mental Health Practices and Suicide: Informing Equitable School-Based Upstream Strategies for Preventing Black Youth Suicide

Constance A. Lindsay, Project Lead

Organizational affiliation(s):

The University of North Carolina at Chapel Hill

Supporting Educators to Hold High Instructional Expectations

Bailey Cato Czupryk, Project Lead

Jason Okonofua, Co-Lead

Organizational affiliation(s):

TNTP; University of California, Berkeley

Systems and Structures for Community School Implementation

Heather Hough, Project Lead

Organizational affiliation(s):

Policy Analysis for California Education (PACE)

Translating Research on Inclusive Family Engagement into Actionable Tools and Resources to Impact Educator Practice

Cassandra Herring, Project Lead

Patricia Alvarez McHatton, Co-Lead

Organizational affiliation(s):

Branch Alliance for Educator Diversity (BranchEd)

Priority 3

Collecting and disseminating SERN's knowledge to share transferrable lessons learned with the broader field.

SERN's work involved connecting people and ideas across long-standing silos, equipping individuals and organizations with resources that amplified their effectiveness, and addressing power dynamics and structures that stand in the way of building and mobilizing practically relevant research. Because much of this work happened behind the scenes, a priority for the sunset was illuminating approaches and processes that could be used by others to support the continued progress of the student experience field – and inform the work of other fields with related needs and demands. To this end, SERN documented its organizational knowledge and lessons learned – including specific strategies and examples – in four key areas, which were selected based on interest expressed by SERN's community:

- [Accelerating the Leadership and Growth of Early Career Scholars](#)
- [Designing Inclusive Scholarly Events that Foster Relationships and Engagement Across Silos](#)
- [Empowering Practitioners, Policymakers, and Funders to Apply Insights from Research](#)
- [Sharing Power in Philanthropic Relationships to Enhance Impact](#)

SERN documented additional learnings from the SERN Midcareer Fellows Program, which serves as a case study in building and measuring the impact of a co-constructed, catalytic program that is

responsive to its participants, bridges across silos, and plants seeds for long-term structural change. The program also generated insights about how academic institutions and policy intermediary organizations can systematically support research-policy bridging by scholars from minoritized groups and how funders can support this type of work. These insights are captured in a forthcoming academic publication and [this slide deck](#) which complements the academic article.

Finally, in order to extend the impact of SERN's annual funder briefing – which was attended by representatives from more than 45 foundations and philanthropic intermediaries over the years – SERN developed a [suite of resources](#) that detail the planning and execution of the event, which can build capacity for other events that enable dialogue and learning across research, practice, policy, and philanthropy.

Priority 4

Celebrating the SERN team, scholars, and partners, and inspiring people to continue to expand upon what SERN started and take up the next phase of work demanded by the field.

An outside consultant assessed SERN's impact on the field. The assessment included a synthesis of SERN's impact informed by interviews with SERN staff and constituents across research, practice, policy, and philanthropy; survey data from additional individuals across these domains; an analysis of funding in the field and documents and data gathered by SERN from its programming over the years; and insights from a survey conducted by SERN of its scholar membership and other

participants in its past research initiatives, as well as analysis of data gathered from these researchers' CVs. The major findings from this assessment are captured in the [story of SERN's evolution and impact](#).

As it sunset, SERN wanted to create opportunities for partners to connect and hosted receptions at two research conferences in spring 2023 to celebrate the researchers who engaged in SERN's initiatives over the years and provide space to reflect on their work together.

SERN produced a [memo that captures priorities for collective progress](#) by the community of actors focused on student experience in their work. The priorities, surfaced through SERN's field engagement leading up to and throughout the sunset, include both continuations of work that SERN began, as well as new directions for the field. Along with these field-generated priorities, the

memo offers calls to action that aim to inform and inspire collective action by actors across research, practice, policy, and funding in support of the next phase of work supporting student experience.

The sunset also includes sharing the story of SERN's evolution and impact – through documents like this one – in part because other organizations who had sunset without doing this saw it as a missed opportunity to share insights with the field. This documentation also acts as a celebration of all that the SERN staff, scholars, and partners accomplished together and serves as a case study for what is possible.

One overarching lesson SERN has taken from the experience of winding down an organization that many had come to rely on is the importance of being transparent about the needs, challenges, and lessons learned in doing this kind of work to help normalize an open discussion about them and the choice points that many organizations have faced and will face, especially in an uncertain climate for funding and as changes in society impact organizations and staff. It's tempting when faced with clouds on the horizon to consider hunkering down and continuing the work for as long as possible. But SERN's executive director, Lisa Quay, said it's important to consider multiple

scenarios and paths to impact when it becomes clear that major changes might be needed to achieve your mission. Where that conversation leads may not be a sunset, but it could mean spinning off a body of work and downsizing so an organization can focus on core priorities. Or it could be merging with another organization. But if it ultimately leads to a sunset, an organization has then given itself time to transfer and seed capacity with others in the field, elevate a next generation of leadership and body of work, and take care of its team.