
Field Catalyst Measurement, Learning, and Evaluation: Adapting Typical Nonprofit Approaches to the Field Catalyst Context

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Date: **February 2025**

SERN found measurement a significant challenge given the unusual type of work in which we engaged and the complexity, nonlinear progress, and longer timelines inherent in systems change. We were not alone. Nearly half of the roughly 100 field catalyst leaders in a 2022 [survey](#) by The Bridgespan Group reported measurement was difficult for their organizations. This piece focuses on what we learned about measurement, learning, and evaluation (MLE) that was unique to—and aided—SERN's functioning as a field catalyst.

SERN's MLE continued to evolve as our organization grew and developed. Our MLE efforts—and the refinement of them over time—were driven both by a desire to improve the quality and impact of our work and the sustainability of our team's activities, as well as our need to report on our progress and impact to our funders.

Broadly speaking, there were three phases to our MLE efforts. The accompanying table summarizes these phases, including the purposes behind our MLE work in each phase, what we measured and how, and how we used the data.

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THREE LESSONS LEARNED

- 1. A codified theory of change tailored to the unique type of work conducted by field catalysts lays the foundation for strong measurement, learning, and evaluation (MLE).**
- 2. Understanding and monitoring the internal capabilities required to contribute to field-level and systems-change outcomes is a critical component of field catalyst MLE.**
- 3. Relationships are central to field catalysts' work and they are thus core to their MLE.**

PURPOSE OF THIS BRIEF

Student Experience Research Network (SERN; formerly Mindset Scholars Network) worked from 2015 to 2023 to cultivate understanding and awareness of how structures in education shape students' experience of respect as valued people and thinkers in school in ways that meaningfully impact their learning and well-being. In partnership with a community of 42 researcher members ("SERN scholars") and over 500 actors across research, practice, policy, and philanthropy, SERN bridged long-standing silos to build and mobilize practically relevant research knowledge.

[SERN served as a field-building intermediary](#), performing a [behind-the-scenes function essential to advancing systems change](#) that has been conceptualized as a "field catalyst,"

although it also goes by other names. Such field-building efforts are often overlooked and under-resourced by funders because they do not fit the mental model of a typical nonprofit. This type of work brings with it a unique set of strategic and organizational needs. This piece is part of a series developed following SERN's strategic sunset in 2023 with the intention of documenting some of SERN's core strategic and organizational practices and lessons learned as a field catalyst. Our hope is that these pieces will contribute to the emergent knowledge base about field catalysts and be of value to others serving in field catalyst roles and those who partner with them.

EXAMPLES AND RESOURCES LINKED IN THIS BRIEF

- [What Philanthropists Can Learn from Field Catalysts About Measuring Progress on Systems Change](#); an article by The Bridgespan Group on understanding field catalyst measurement for funders as part of Bridgespan's broader initiative on [field building for equitable systems change](#)
- [Field Building for Population-Level Change](#); a report by The Bridgespan Group defining key terms about fields and field building and illustrating how fields tend to progress
- [Field Catalyst Origin Stories: Lessons for Systems-Change Leaders](#); a report featuring research by The Bridgespan Group on how field catalysts originate
- [Due-Diligence Guide to Support Systems-Change Leaders](#); a tool by The Bridgespan Group to help organizational leaders and funders understand and assess the four key assets or "superpowers" of field catalysts
- [Contribution Analysis in Policy Work: Assessing Advocacy's Influence](#); a brief by ORS Impact on contribution analysis methodology
- [Sample participant feedback survey](#) from one of SERN's annual funder briefings
- [Example from SERN's annual funder briefing resource suite](#) illustrating how SERN reflected on and learned from participant feedback
- [SERN's Story and Impact](#); a series of articles summarizing results from an independent impact assessment
- [Briefs and internal resources documenting SERN's lessons learned](#) as part of its strategic sunset
- [Priorities for the Student Experience Field](#); an example of how SERN synthesized field-level priorities based on input from a wide range of field actors
- [An Inside Look at the Partnership Between Funders and Field Catalysts](#); an article illustrating how field catalysts and funders can partner together effectively to advance systems change
- SERN's [tool for tracking and managing organizational relationships and assessing progress on leading indicators](#) toward SERN's impact goals
- [Becoming a Field Catalyst](#); an article on how SERN became a field catalyst and findings from an impact assessment about the core assets it brought to this work
- [Measurement, Evaluation, and Learning: A Guide for Field Catalysts](#); a resource by The Bridgespan Group on developing theories of change and MLE approaches for field catalysts and communicating about them with funders

Summary of SERN's measurement, learning, and evaluation efforts, by phase

PURPOSE	WHAT WE MEASURED AND HOW	HOW WE USED THE DATA
PHASE 1. 2015-2023*: MLE to improve programming and understand field and partner needs		
<p>1. Improve our programming and learn how to better serve our community</p> <p>2. Advance initial strategic focus on agenda setting, broadening awareness of the field, and connecting more people to it</p>	<p>Quality of SERN participants' experience via feedback surveys and interviews</p> <p>Engagement with SERN via various forms of tracking (e.g., participation in activities, people's responses to our inquiries and invitations, metrics on online content); we also tracked the people and organizations that engaged with us across relevant sectors as we sought to grow and diversify the group of actors connected to the field</p>	<p>We used these data in debriefing programming and identifying areas for improvement.</p> <p>We shared analyses of participants' experience and the engagement tracking data in our early funder reporting.</p> <p>As we began to co-construct programming with our partners, we relied on more intensive data gathering and analysis to inform program design.</p>
PHASE 2. 2020-2022: MLE to refine strategy and track progress toward SERN's impact goals		
<p>1. Continue to refine our theory of change and strategy as a field catalyst</p> <p>2. Better understand and address the organizational capabilities required to execute our field-building work</p>	<p>Information on leading indicators of progress toward our impact goals (see below) via documenting examples we observed in the field and stories shared with us by field actors (either of their own accord or in response to our queries)</p> <p>Information about the state of the field via tracking what we heard and observed in the field</p> <p>Staff utilization via tracking individual staff hours; staff experience via feedback on performance reviews and surveys; staff development via performance review data and conversations held by the executive director and chief of staff with people managers</p>	<p>We periodically gathered and discussed data on the leading indicators and field-level information as a team (e.g., in annual pull ups to reflect on progress toward our impact goals; in weekly check-ins and team spaces) to inform strategy and tactics.</p> <p>Our funders increasingly accepted reporting on a shared set of metrics and we reported progress on our leading indicators to them as a group.</p> <p>We used staff hours to inform decisions about how to adjust project load and staffing.</p> <p>We assessed data from performance reviews and manager conversations to determine organizational and staff development priorities.</p>

PURPOSE	WHAT WE MEASURED AND HOW	HOW WE USED THE DATA
PHASE 3. 2022-2025: MLE to sustain field-building momentum through a transitional period and contribute to broader case making and capacity building		
<p>1. Support the field's momentum through a period of transition as the field's needs shifted and SERN sunset: a) understand, document, and share SERN's lessons learned to expand the field's capacity; b) surface forward-looking priorities for the field as a whole and draw in new funding for them; and c) celebrate what we learned and accomplished together</p> <p>2. Contribute to the broader domain of "field building" by adding to the body of practical knowledge on field catalysts and contributing evidence and collateral that could support case-making for other field catalysts</p>	<p>Partnered with a third-party firm to conduct an assessment of SERN's impact on the field; assessment included analysis of interviews and survey responses as well as data from scholarly participants' curriculum vitae and analysis of publicly available data</p> <p>Identified SERN's lessons learned via gathering input from field partners on SERN's unique strengths and contributions and engaging in internal reflection and document review</p> <p>Identified field priorities via gathering input from field partners through surveys, conversations, and data from our final request for proposals (RFP)</p>	<p>We shared results of the impact assessment in public reporting and in individual meetings with our funders as part of encouraging future investment in priority areas for the field.</p> <p>We engaged in team reflection and document review to produce lessons learned briefs aimed at audiences both within and beyond our field. We engaged in a thematic analysis of data from surveys, conversations, and applications to our final RFP to yield field priorities.</p> <p>In winter 2025, we will release a synthesis of key findings and reflections on the impact of our final major field-building investment.</p> <p>To encourage greater funder investment in field catalysts, we partnered with The Bridgespan Group to publish an article on how SERN's funder partnerships unlocked field-level impact, as well as a suite of communications collateral about field catalysts.</p>

* We concluded our programmatic work in May 2023 and will wrap up our internal, operational sunset in March 2025 when all of our sunset-related grants have finished and our reporting obligations to our own funders are complete.

This piece features three lessons learned about engaging in MLE as a field catalyst; these lessons chiefly center MLE that can benefit the field catalyst organization and contribute to its impact.¹ It is important to acknowledge up front that Bridgespan's work on [field building for equitable systems change](#) and its team's thinking on how

to understand and measure field catalysts' impact was highly influential to us at SERN. All the lessons shared below are informed by a long-standing dialogue with leaders at Bridgespan and their ongoing research on this topic (see this Bridgespan [resource guide](#) for more information).

¹ For a discussion of how funders can engage productively with field catalysts on measurement, read this [publication](#) by The Bridgespan Group, which includes a conversation starter resource.

Lesson 1

A codified theory of change tailored to the unique type of work conducted by field catalysts lays the foundation for strong MLE.

In contrast to organizations that primarily provide direct services or engage in advocacy, field catalysts are different. They exist to provide vital infrastructure and organizing that enhances the collective impact of entire ecosystems of actors who are working to shift the systemic conditions that hold population-level inequities in place. These conditions include policies, practices, resource flows², relationships and connections, power dynamics, and mental models. Equitable systems change is the process of addressing root causes of social issues by changing such conditions in order to achieve equitable outcomes. It requires capacity, coordinated activities, relationships, and investments at multiple levels in the system to unlock progress on these conditions.

This process takes many years and often decades to achieve the goal of durable population-level change. Field building supports the work of systems change and is often led by field catalysts. These organizations play a behind-the-scenes role amplifying and harmonizing the efforts of the field that make such systems change possible. Thus, field catalysts need to be focused on—and monitoring—both the state of the field itself and progress toward systems change goals. This “dual lens” (as Bridgespan refers to it) is unique to this type of organization and informs evolutions in the field catalyst’s theory of change and strategy over time. As such, a [field catalyst’s theory of change](#) focuses on how its efforts will advance the field’s

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[overall development](#) (i.e., knowledge base, actors, field-level agenda, connective tissue among actors, resources, public sector system involvement) by engaging in the following roles: diagnosing and assessing the core problem and ecosystem of actors focused on it, connecting actors around a shared goal, and shining a spotlight on the issue. Field catalysts also often fill specific critical gaps in the field by engaging in direct service, regranteeing, and policy and advocacy in ways that will contribute to shifts in the underlying systemic conditions over time.

SERN'S THEORY OF CHANGE

At SERN, our theory of change aligned with our positioning as an organization founded to focus on research and working in an [earlier-stage, issue-based field](#). We brought together diverse bodies of research to diagnose and shine a light on the problem of inequitable student experience of school and its contribution to broader issues of educational inequity in the United States. We connected researchers, practitioners, policymakers, and funders working on solutions to this issue and helped them grow the knowledge base and its application in practice and policy. To do so, we made field-building investments to synthesize and disseminate the existing knowledge base,

² “Resource flows” includes but extends beyond funding; it [refers](#) to how money, people, knowledge, information, and other assets such as infrastructure are allocated and distributed.



connect actors across long-standing silos, cultivate alignment on a field-level agenda, and draw in more financial resources to the field. The accompanying figure shows a version of our theory of change from 2020 along with examples of the types of activities we engaged in between 2020-2023 aligned to that theory of change.

We also used regranting to fill a specific, critical gap we observed in systems change efforts: namely, that practitioners and policymakers needed practically relevant research on how to change structures in

education in ways that would equitably improve student experience. However, the structures of the academy do not incentivize such scholarship and philanthropic and public funding was not flowing to a diverse group of researchers with the relevant expertise and experience to conduct such work. Moreover, the knowledge that was produced was not accessible or usable by the people who informed decision-making by system- and institutional-level leaders. SERN deployed its funds via grantmaking, fellowships, and cohorts designed to fill these gaps.

SERN's Vision and Purpose, and Theory of Change (version from 2020)

Vision and Purpose: SERN advances research, relationships, and capacity to create a better education system: one that supports every student's learning and well-being by respecting them as a valued person and thinker.

Barriers to this vision that SERN is uniquely poised to address:

Practitioners, policymakers, and funders need to understand what research across multiple disciplinary silos tells us about the importance of student experience to student learning and well-being and how structures shape that experience—**and how this research can inform practice and policy decisions**

Practitioners, policymakers, and funders are **barraged with myriad competing priorities**—especially in the context of transformative crises—and **need information that is directly applicable and complementary** (vs. additive) to their work and decisions

Few natural connections exist between researchers, practitioners, and policymakers to enable feedback loops and collaborations that can inform research and make sense of its implications; structures in the academy do not incentivize work that is cross-disciplinary or authentically responsive to the needs of students, families, and educators



Examples of activities SERN engaged in between 2020-2023 aligned with the four priorities in our theory of change from 2020

Synthesize, translate, and disseminate key research insights that can inform decision-making	Serve as a trusted thought partner and provide advice to entities that influence leaders' decision-making	Broker connections among research, practice, and policy	Enable practically relevant interdisciplinary research
<p>Identified relevant scholarship and published syntheses on topics surfaced from engagement with practitioners, policymakers, and funders; disseminated via influential nodes in education</p> <p>Created scaffolded opportunities (e.g., cohorts, events) for target organizations to make sense of translated research and develop applications to their work, as well as identify practically relevant gaps in the research knowledge to inform new knowledge building</p>	<p>Advised target organizations on practical implications of the research (e.g., responding to queries; providing feedback on reports, strategies, messaging; participating on advisory committees)</p> <p>Participated in events hosted by target organizations that convened wider groups on topical issues in education</p> <p>Brokered connections between interested researchers and these organizations to advise where interests and expertise were aligned</p>	<p>Engaged in regranting that encouraged cross-sector collaborations between research, practice, and policy (e.g., RFPs, fellowships)</p> <p>Hosted events that provided scaffolded opportunities to build relationships, knowledge, and alignment between researchers, practitioners, policymakers, and funders (e.g., SERN's annual funder briefing)</p> <p>Created opportunities that elevated and invested in the leadership and development of scholars seeking to bridge student experience research with practice / policy (e.g., fellowships; convening sessions)</p>	<p>Engaged in regranting that encouraged practically relevant knowledge building (e.g., RFPs)</p> <p>Utilized our prior investments in research infrastructure to encourage and elevate practically relevant scholarship (e.g., data and working paper repository)</p> <p>Hosted scholarly convenings designed to foster relationships and capacity building that could advance practically relevant, interdisciplinary scholarship</p>

THE OUTCOMES AND OUTPUTS SERN TRACKED THROUGH ITS MLE EFFORTS

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had fully embraced our field catalyst role, our MLE efforts focused on gathering quantitative and qualitative data on measures of systems-change outcomes and field-focused outcomes:

Systems-change outcomes: The extent to which a targeted set of leading education intermediary organizations, funders, and other education actors with significant influence within the United States integrated research insights on students' experience of school into their strategies, investments, programming, products, advising, agendas, and messaging. We selected these entities for their outsized role and extensive reach nationally in shaping decision-making by system- and institutional-level leaders. When we honed in on these outcomes in 2020, this focus was a strategic choice given how we and our allies were positioned, the capacity of our team, and the broader transformative crises in American society that were profoundly shaping the education system.

Leading indicators of progress toward these systems-change outcomes: We used our knowledge of these types of organizations and how they functioned, our past observations of them metabolizing and integrating research knowledge, and scholarship on the use of research evidence to articulate a set of leading indicators of progress toward these systems-change goals (see the list of leading indicators at the end of this [organizational review document](#), which we used periodically as a team to track progress with target organizations). These indicators focused on brokering new collaborations between researchers and these types of practice and policy actors, and supporting their creation and application of practically relevant, equity-centered research knowledge.

Field-level outcomes: It was also critical to continuously monitor the state of the field as this is a key enabler of the systems change we and others

In assessing the impact of field catalysts on systems-change and field-level outcomes, the focus is primarily on contribution rather than attribution.

in the ecosystem were working toward. In our day-to-day work, this information gathering was regular but informal—pulling themes and new actors and field-level developments from conversations, convenings, conferences, and readings and discussing in team spaces to keep our finger on the pulse of the field. We also gathered data on multiple field-level outcome measures in the cumulative assessment of SERN's impact during our sunset. These measures focused on the state of knowledge and relationships in the field as well as who and what was being funded, and whether this had changed over time.

In addition to these outcomes, we also always measured and reported on key outputs of our work; indeed, as described in the table above, this is where our MLE journey started. In particular, we gathered information on who participated in our field-facing work and their experiences, the types of new partnerships and knowledge our investments generated, as well as how people used and shared the knowledge products we created. This information helped us build and refine our theory of change over time; it also contributed to conversations internally about what to prioritize.

TWO ADDITIONAL CONSIDERATIONS FOR CONCEPTUALIZING FIELD CATALYST MLE

First, in assessing the impact of field catalysts on systems-change and field-level outcomes, the



[focus is primarily on contribution rather than attribution](#). It is possible to assess what change has happened and whether it is likely that the field catalyst contributed to such change. Codification of a strong hypothesized theory of change and measures that help assess and refine that theory of change over time are vital because they lay the groundwork for rigorously [assessing contribution](#) to systems-change outcomes. This can represent a challenging but crucial mindset shift, especially given pervasive beliefs and biases about causal evidence from experimental or quasi-experimental studies as the be-all-end-all form of evidence; such methods would not be appropriate given the nature of field catalysts' work.

Second, as with any organization, MLE efforts should be undertaken that are appropriate to the stage of development of the organization and the intended purpose for gathering information. In SERN's case, our MLE work evolved significantly over time, as depicted in the first table in this piece.

Lesson 2

Understanding and monitoring the internal capabilities required to contribute to field-level and systems-change outcomes is a critical component of field catalyst MLE.

Field catalysts need to invest in unique capabilities to achieve their theories of change and deliver

Field catalysts need to invest in unique capabilities to achieve their theories of change and deliver on the field-level and systems-change outcomes they have identified. Keeping a pulse on these capabilities and learning how to develop them is essential to delivering on a field catalyst's impact goals.

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Bridgespan's research on field catalysts has identified [four key assets or "superpowers"](#) that are critical to advancing systems change work; effective field catalysts embody these assets in various forms:

1. **Deep understanding of the problem and ecosystem**
2. **Vision for equitable and durable population-level change**
3. **Trusting relationships and credibility with the actors required to achieve change**
4. **An organizer's mindset**

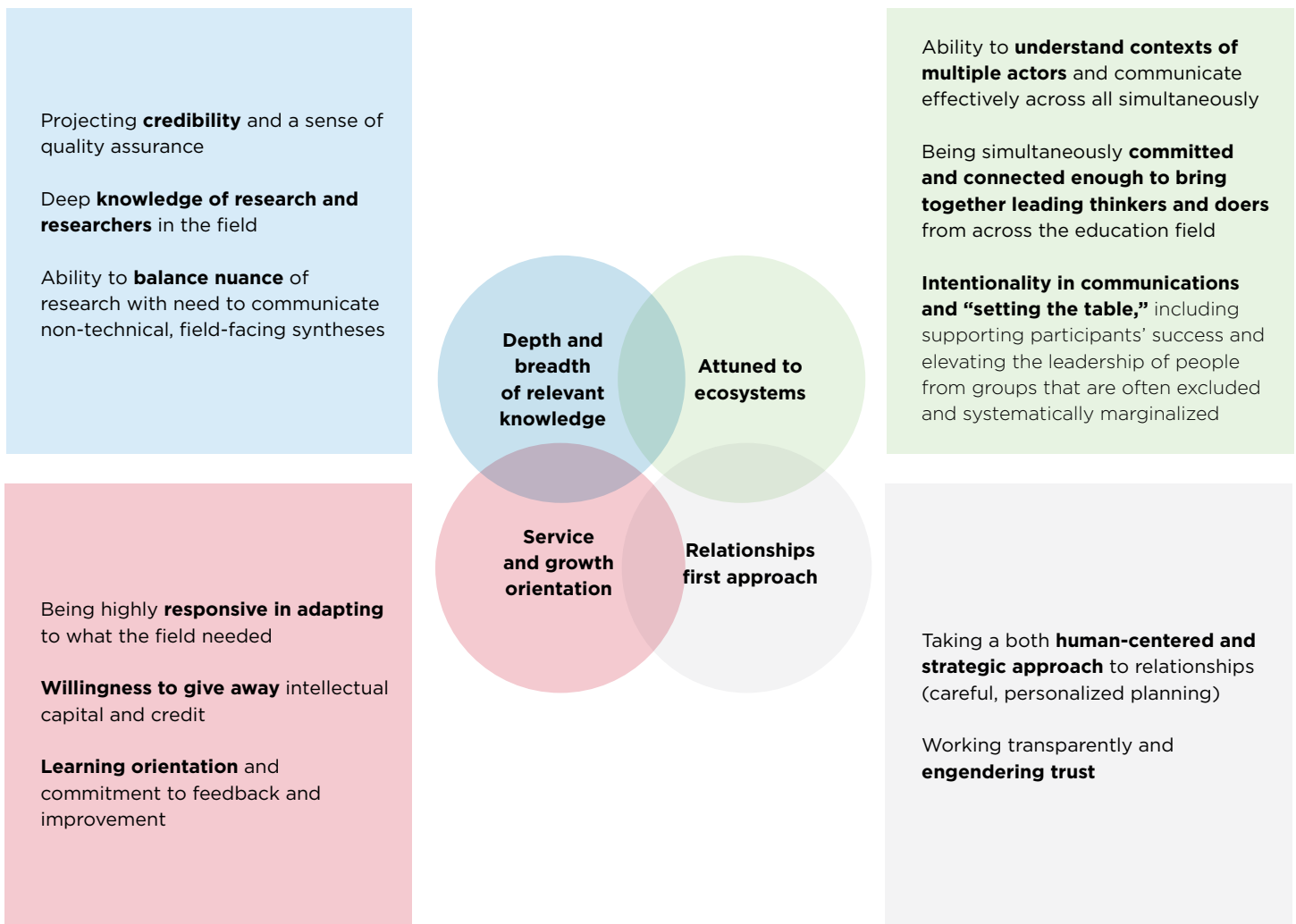
UNDERSTANDING AND GATHERING DATA ON SERN'S CORE SKILLS AND ASSETS

A key lesson from SERN's field-level impact assessment in 2023 was that while it took years to see some of the field-level shifts we were hoping for, there was an underlying approach to how we operated in the field that was consistent from the

beginning (even as we refined and evolved our work as we learned)-and this way of operating enabled these shifts.

The accompanying figure illustrates SERN's underlying skills and assets that unlocked the field-level impact we observed and enabled us to serve as an effective field catalyst. For more information, check out this article on [how SERN became a field catalyst](#).

Skills and assets that unlocked SERN's field-level impact as a field catalyst



We also learned that our approach was meaningful and measurable: it was clear, observable, and felt by the people SERN engaged. We saw evidence of it in the data in the third-party impact assessment. For example:

“SERN was committed and connected enough to bring people together. When you see presidents of major foundations and top public-school leaders in a room with scholars and students... I hadn't seen all those people put in conversation before.”

“SERN was always in touch with the latest and most novel ideas... It's difficult to identify another entity like SERN in that respect.”

“The magic of SERN [was] that they were our true partner, and they were the intermediary that was really thinking about, not just them as an organization, but how can we move the field forward.”

“Every time SERN asked us to do something, we said yes. We never declined an opportunity... maybe the reason we never said no was because of how opportunities were presented and the intentionality around the language used not only in written communication, but also in shared spaces.”

But it was also clear in the programming and community data we had been gathering for years; for example:

- 93% of SERN Midcareer Fellows Program participants reported that they could bring their authentic self to fellowship spaces—notable for scholarly spaces in particular.

- SERN Midcareer Fellows Program participants commented about SERN's holistic support for and responsiveness to the fellows and the joyful, collaborative tenor of the community that SERN cultivated. As one participant noted: “The level of responsiveness, whether it had to do with personal interactions, fellowship programming, or deliverables, really made me feel heard and seen.”
- Nearly 100% of participants in our annual funder briefing every year reported the event was worthwhile, with the vast majority (typically 80-90%) reporting it was “very worthwhile.”
- In annual funder briefing feedback surveys, attendees specifically named of their own accord multiple specific tactics that supported a positive experience of inclusion and belonging.
- Funder briefing speakers also reported feeling very well supported by SERN to succeed, which was notable in a high-stakes context presenting on work to a room full of dozens of current and potential funders.

While we did not include such organizational capabilities and assets in the theory of change we codified in our 2020 strategy, they featured prominently in the narrative that emerged from our impact assessment. As such, it may be worth considering how these organizational assets might be connected to field catalysts' theories of change more explicitly. This could be useful for their own purposes internally and also in communicating with funders and other partners.



COLLECTING INFORMATION ON SERN'S ORGANIZATIONAL HEALTH AND WELL-BEING

In addition to these assets, we increasingly learned the importance of gathering data on indicators of organizational health and well-being (e.g., funding, leadership and staff wellness, strategic clarity, board development, talent capabilities).

One of our earliest priorities on this front was getting accurate reporting of individual staff hours because we were struggling with excessive workload and burnout. We complemented these data with gathering regular feedback from staff as part of quarterly performance review processes. We took steps to shift workload, project scoping, and improve people and project management, which reduced hours for most staff.

As part of a larger talent development strategy, we also integrated reporting on field catalyst-aligned staff competencies in performance reviews (e.g., relationship management) and began gathering periodic survey data from staff on organizational culture and health; all of this information shaped decision-making about organizational and staff development priorities.

We discussed aspects of organizational health and well-being with our funders, which led to candid and fruitful discussions about the future of SERN and the field.

Field catalysts are only as effective as their ability to build, sustain, and mobilize trusting relationships in the ecosystems in which they work. At SERN, we learned that relationships were thus central to our MLE, as well-both in what and how we measured.

Lesson 3

Relationships are central to field catalysts' work and they are thus core to their MLE.

Field catalysts are only as effective as their ability to build, sustain, and mobilize trusting relationships in the ecosystems in which they work. At SERN, we learned that relationships were thus central to our MLE, as well-both in what and how we measured.

First, it was important for us to understand relationships as a characteristic of field development. We asked questions like: Who saw themselves as connected to the field (and who did not / why)? Who collaborated with whom (and who was not collaborating with whom) and why? Who could influence whom? What were the enablers and barriers to extending important relationships within the field?



Second, we needed to understand how actors felt about us and their relationship with SERN. As noted above, trusting relationships and credibility with the actors required to achieve change is one of field catalysts' foundational assets that make or break their ability to contribute to equitable systems change. We both listened between the lines (How did busy people respond to our requests? What did they tell others about us?) and also asked direct questions to understand people's perceptions of SERN and their relationship with us and others in the communities we cultivated in the field.

Third, we relied on sustained relationships with field actors to gather data on the field-level and systems-change outcomes we targeted. It took years and many touch points with people and organizations to realize the kinds of changes we were seeking; we had to be in regular communication with people

to observe such impact unfold over time. We gathered data on these outcomes over sidebars at meetings hosted by others, periodic check-in calls, texting threads about other topics, and catching up informally while at a conference. We had processes internally for documenting data from this relationship engagement and ensuring that we were coordinating outreach to people so that they received a coherent experience of SERN and were not receiving too many requests. These ongoing relationships built on mutual respect and trust also facilitated more formal data gathering via surveys and interviews; we had high response rates when we asked for such information because people knew we would take what they shared with us seriously and do our best to offer something of value to the field.