
Field Catalyst Strategy: Designing Strategies and Organizations that Can Adapt and Evolve

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[Like many nonprofit organizations](#), SERN had a strategy that guided decisions about how to deploy our resources (time, talent, voice, knowledge, and funding) in service of advancing our mission. It also helped us signal our priorities to our staff and partners—both what we would and would *not* do. Our strategy included a theory of change and impact goals, specific strategic priorities, and implementation plans and measurement practices to manage and monitor progress.

However, as we [grew into the field catalyst role](#), *what* these common strategy components looked like began to evolve from more traditional models and we started to use them differently. We also shifted from a strategy that we planned out in detail and then implemented over a period of years to more of an “adaptive” strategy. An adaptive strategy is tight on goals and loose on how to achieve them. This allowed us to evolve our approach and activities as the larger context for our work changed and we learned more. It had significant implications for how we communicated and planned the implementation of our strategy.

SERN'S STRATEGY JOURNEY AS A FIELD CATALYST

As a field catalyst, our theory of change evolved to emphasize [developing the overall field](#) (i.e., knowledge base, actors, field-level agenda,

THREE LESSONS LEARNED

- 1. Learning, adaptation, and evolution are core to being a field catalyst and thus must be foundational to how field catalysts design their strategies and organizations.**
- 2. It is critical to use moments of opportunity to advance the field; field catalysts' ability to do so is predicated on their strong relationships with and deep knowledge of the field.**
- 3. Field catalysts need to serve the field as a whole (rather than individuals or subgroups within it) and to continuously adapt their work; this can create tensions externally and internally and requires difficult balancing acts.**

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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

- [How Nonprofits and NGOs Can Get Real Value from Strategic Planning](#) and [What Are Intended Impact and Theory of Change and How Can Nonprofits Use Them?](#); resources by The Bridgespan Group about strategic planning for nonprofits
- [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
- [Building a Field](#); a brief by ORS Impact that describes field building and illustrates the types of outcomes to expect
- [Field Catalyst Origin Stories: Lessons for Systems-Change Leaders](#); a report featuring research by The Bridgespan Group on how field catalysts originate
- [Field Catalyst Measurement, Learning, and Evaluation: Adapting Typical Nonprofit Approaches to the Field Catalyst Context](#); a brief on SERN's lessons learned about measurement, learning, and evaluation for field catalyst organizations
- [I2L2: Impact, Influence, Leverage, and Learning](#); a brief by ORS Impact that defines systems change and explains the I2L2 model in considering systems change
- Communications collateral for SERN [scholar members](#) and [partners](#) explaining the evolution in our 2020 strategic plan
- [Public messaging of SERN's new strategy and name](#)
- [Letter](#) from SERN's executive director to the SERN community about the decision to pursue a strategic sunset; [public announcement](#)
- [Briefs and internal resources documenting SERN's lessons learned](#) as part of our strategic sunset
- [SERN's sunset grantmaking portfolio](#) to help seed a next generation of work in the student experience field as it 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
- [The Evolution and Impact of Student Experience Research Network](#); an article summarizing SERN's evolution and the results of an independent impact assessment
- [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
- [Field Catalyst Staffing: Building and Sustaining a Team of Bridgers and Organizers](#); a brief on SERN's lessons learned about staffing a field catalyst organization
- [SERN's Midcareer Fellows Program](#) and the [Education Scholars Training Program](#) by Scholars Strategy Network that is carrying on its legacy
- [Reflections from a Strategic Sunset](#); an article on why and how SERN engaged in a strategic sunset in 2023



connective tissue among actors, resources, public sector system involvement) and [filling critical gaps in the field](#) (for SERN: using regranting and programming to advance knowledge building and its application in shifting education practice and policy) as a means of making progress toward systems-change outcomes to which we aspired. This theory of change [looked different than that of many nonprofits](#), whose theories of change often focus on populations, places, and outcomes tied to programmatic or advocacy work. (To learn more about SERN's theory of change as a field catalyst, check out the piece in this series on [field catalyst measurement, learning, and evaluation](#).)

ARTICULATING NEW IMPACT GOALS AND STRATEGIC PRIORITIES

In our 2020 strategy refresh, when we more formally embraced the field catalyst work we had been growing into, we set impact goals aimed at achieving research-informed shifts in the strategy, programming, and investments made by influential practice and policy intermediaries and funders who shaped decision-making by leaders in education systems and institutions in the United States. These impact goals aimed at [systems change](#) and were grounded in our lens as an organization founded with a focus on research.

We articulated strategic priorities that sought to accomplish critical steps toward these impact goals, including:

- Synthesizing and translating key research insights that could inform this decision-making;
- Serving as a trusted thought partner and providing advice to these influential intermediary organizations and funders;
- Brokering connections between research, practice, policy, and funding actors that could build relevant knowledge and advance its application to this decision-making; and,
- Enabling practically relevant research on students' experience of school and how structures in education shape it.

This strategy was informed by dozens of interviews and surveys and a round of feedback from members of our community as well as a series of internal discussions with SERN staff. The final version looked different from past strategies. Previously, we delineated a specific set of activities underneath our priorities, which guided detailed implementation planning. But in this new approach, we adopted

an “adaptive” strategy as we embraced the field catalyst role into which we had been growing for several years. It was June 2020, the United States faced multiple transformative societal crises impacting our education system, and our field was at an inflection point—beginning to shift from a greater emphasis on case-making to more applied work. Our funders’ appetite for funding basic research—a core aspect of our first five years—had also waned given the need to respond to these societal crises. SERN needed a strategy that we could adapt as we learned and the field and our society continued to change.

In addition to the strategic priorities, we incorporated a learning agenda: a set of questions on which we would gather information and revisit annually to refine our strategy and theory of change over time. These questions focused on understanding shifts in the broader field landscape and priorities, specific lessons learned about how to advance our impact goals, where we could be of greatest service in the upcoming year, and the extent to which our internal structures and processes were supporting us in being nimble and adaptive.

BEGINNING IMPLEMENTATION OF A FIELD CATALYST STRATEGY

Following the strategy refresh, our team engaged in a three-month planning process to design pilots that would help us “learn into” various aspects of our strategy over the first 12 months. These pilots were designed to help us learn more about what the field would respond to and also how our organization needed to evolve and expand our capabilities and capacity to deliver on this strategy. They also provided an opportunity for our team to practice some new internal processes that would help us deliver on the strategy, including a new decision-making framework designed to help clarify

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and distribute decision-making within the organization, as well as meeting structures intended to improve cross-functional visibility and collaboration.

During this time, we also rolled out our strategy to the members of our scholar network as well as our other partners and allies. Although in many ways this strategy formalized an evolution we had been making for the past couple of years, it also represented a major shift in what we would—and would no longer—do. In addition to the community engagement during the strategy building process itself, these carefully framed communications to roll out the final strategy explained what would be staying constant and what would be evolving and why. We produced one version for our [scholar members](#) and another for our [other partners and allies](#). Following the conclusion of our pilot process, we also shared with our community examples from the set of projects we had begun as part of rolling out a new name for our organization that reflected our evolution; this allowed us to [“show” our strategy—not just “tell.”](#)

CONTINUING TO REFLECT ON STRATEGY THROUGH THE LENS OF THE FIELD’S NEEDS AND EVOLUTION ULTIMATELY LED TO THE DECISION TO SUNSET

As a field catalyst, it is our responsibility to continuously assess our work against field needs to

ensure there is alignment and growth. SERN was halfway through our 2020-2023 strategy when we received a generous gift from the philanthropist MacKenzie Scott. While we continuously kept a pulse on the field in our day-to-day work and internal processes, these combined factors made it an appropriate time to step back and systemically take stock of what the field needed in light of its continued evolution and the multiple dramatic shifts we were grappling with in education and society.

I held conversations with nearly 40 leaders across research, practice, policy, and philanthropy. Our staff and board reflected on lessons learned from our work over the previous two years and our broader engagement with the field. Our chief of staff and I also conducted detailed organizational and financial modeling. The goal for this process was to understand what the field was seeking, learn from our experience implementing the first two years of our current strategy, and determine how we could leverage these resources to maximize our impact moving forward given the field needs and the larger context for our work.

As I shared in a [communication to our staff and community](#) and a [public blog post](#), my key takeaway was that the work by SERN staff and scholar members, along with everyone we had partnered with and learned from over the years, had helped to advance the field in such a way as to require something different than what SERN was poised to do. This led me, in consultation with the SERN board, to make the decision to strategically sunset SERN.

In doing so, we would use our resources to [document and share key lessons](#) from SERN's experience and [help seed research-focused capacity](#) in the field to continue movement toward an education system that consistently and

equitably centers student experience. We would also synthesize a set of [forward-looking priorities for the field](#). Our goal was to accelerate the transition to the next stage of the field and elevate leaders taking on the work the field was demanding.

Our strategy journey at SERN included many lessons about designing, managing, and communicating strategy as a field catalyst. Below are three key lessons that came to the fore repeatedly over the years.

Lesson 1

Learning, adaptation, and evolution are at the core of serving as a field catalyst and thus must be foundational to how field catalysts design their strategies and organizations.

When I presented on SERN's impact to our founding funders as part of completing our strategic sunset, my first slide highlighted just how much we had [evolved](#) over the eight years of our existence.

In 2015, SERN (then “Mindset Scholars Network”) was founded by a group of leading psychologists who wanted to collaborate with other social scientists to assess how the effects of interventions to change students' mindsets varied and might be maximized. They sought to use an innovative, cross-disciplinary approach to better understand where, for whom, and under what conditions these interventions improved academic outcomes and how this science of mindsets might be applied more broadly and with fidelity.

By 2023, we had evolved into a “big tent” hub of relationship-building, knowledge generation, and

research mobilization that engaged a more heterogeneous group of hundreds of influential education actors across research, practice, policy, and philanthropy. Our purpose had become: How can we use research to help transform an education system that was designed to stratify, segregate, and reproduce inequality into one that supports every student's learning and well-being by respecting them as a valued person and thinker—and thus affirming their humanity?

This was a major evolution consisting of both smaller and larger shifts over a several year period. We evolved because we listened to—and positioned ourselves to respond to—what the field needed.

An [orientation toward learning, evolution, and adaptation is foundational](#) for all field catalysts, regardless of the social or environmental area in which they work. At SERN, it was critical that we take stock of the field's development and needs repeatedly. From there, we assessed how we could adapt what we were doing to support the field in taking next steps. This required our team to be in relationship with a diverse range of actors and showing up in spaces both within and adjacent to our field. We also spent a lot of time reading, watching, and listening to content across long-standing silos (e.g., methodology, sector) to create a holistic picture of knowledge directions, relevant actors, and collaborations. We used a variety of organizational spaces—in individual check-ins, discussions within specific teams, and structured reflection sessions as a leadership team and as an entire organization—to share and make sense of what we were learning and reflect on its implications for our work.

This need to adapt and evolve had significant implications not just for our strategy but also our

Repeatedly taking stock of the field and making shifts required certain orientations and skills on our team. It meant we had to build measurement and learning systems that allowed us to monitor both the state of development of the field and progress toward our systems-change outcome goals. It was also essential that we regularly reflect on and learn from the actions we took in the field.

underlying organizational systems. Repeatedly taking stock of the field and making shifts required certain orientations and skills on our team, which we had to acquire and develop via hiring, staffing (including our use of consultants in addition to full-time staff), talent development, and organizational culture practices. It meant we had to build measurement and learning systems that allowed us to monitor both the state of development of the field and progress toward our systems-change outcome goals. It was also essential that we regularly reflect on and learn from the actions we took in the field. These measurement and learning systems are vital to refining a field catalyst's strategy and theory of change over time. To learn more, check out the pieces in this series on [field catalyst staffing](#) and [field catalyst measurement, learning, and evaluation](#).

Lesson 2

It is critical to use moments of opportunity to advance the field; field catalysts' ability to do so is predicated on their strong relationships with and deep knowledge of the field.

As an organization dedicated to advancing the field's development and making progress toward systems-change outcomes, SERN learned to take advantage of moments of opportunity that would allow us to accelerate progress toward these larger goals.

As one example, the funding landscape in 2020 was challenging for SERN. Based on our close relationships with funders, we learned that many of the institutional funders we engaged were going to increasingly prioritize responding to the multiple crises in the United States. This would reduce SERN's capacity to continue funding scholars to conduct basic research. This funding trend extended into 2021 as the right-wing in the United States intentionally stoked a backlash against efforts to advance racial equity. Through repeated conversations with the field and other field monitoring practices, we knew that funders and scholars were increasingly mobilized around issues of education policy in this broader societal context. Those of our funders who remained interested in funding work with researchers also signaled interest in supporting a more racially and ethnically diverse group of scholars than they had [typically funded](#).

Against this backdrop, one of the pilot projects our team developed out of the 2020 adaptive strategy was a [fellowship](#) in 2021-2022 that supported the leadership of midcareer scholars from minoritized groups within the academy to bridge between

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research and policy. In addition to providing a great opportunity for one of our existing funders to renew their multi-year funding of SERN, the program was part of what piqued the interest of a new funder who came in with core support, as well. And once SERN's sunset had been announced in fall 2022, we capitalized on the success of that fellowship and used a relatively small amount of SERN's funds to draw in other funders to provide multi-year support to our partner, Scholars Strategy Network, to host a [new version of the fellowship](#) following SERN's sunset that would extend the program's reach and enhance its legacy.

We used a window of opportunity we saw in the field—an appetite among funders to invest in racial equity and more practically relevant work by scholars, combined with interest among scholars to use their expertise in engaging in public policy—to accelerate our broader impact goals of bridging between equity-centered research on student experience and policy decision-making. Our strategic clarity combined with our close field relationships and keeping our ear to the ground made it possible to make this move.

Lesson 3

Field catalysts need to serve the field as a whole (rather than individuals or subgroups within it) and to continuously adapt their work; this can create tensions externally and internally and requires difficult balancing acts.

Research has shown that field catalysts struggle with [balance](#) on multiple fronts given how their organizations are situated in fields and the type of work they do.

Field catalysts must serve the field as a whole. This entails acting with humility and care in supporting, amplifying, and harmonizing the work of a diverse ecosystem of individuals and organizations rather than serving the interests of individual actors or subgroups within the field—some of whom have a greater interest in advancing their specific perspective and bottom line.

SERN encountered multiple challenges on this front as we served the interests and needs of an increasingly heterogeneous and cross-sector community that involved researchers, practitioners, policymakers, and funders. As our work evolved in response to field demands, we made larger investments in activities focused on research use and a broader group of researchers and types of scholarship.

Many SERN scholar members understood and saw the value in these shifts; however, it also contributed to dissatisfaction and disengagement among some members, including as it shifted power and resources within the community. The balance between serving education actors operating on faster timelines with the longer timelines

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in conducting research and creating rigorous translational content also created tensions. And as we engaged a wider set of field actors across sectors, some in our community felt research and researchers were being minimized, while others saw SERN as remaining too focused on research. As one funder reported in an interview as part of the third-party impact assessment conducted on SERN, “While SERN was a scholars’ network at its heart, they understood that meeting the needs of the [non-researcher] stakeholders was essential... But attending to [the field’s] needs creates all kinds of tensions.”

Tensions also arose for SERN in balancing the needs of the field and those of the organization. As Bridgespan’s [research](#) on field catalysts has documented, field catalysts’ efforts to harmonize and amplify the work of heterogeneous ecosystems of actors to advance equitable systems change—often in the face of external roadblocks and threats—is inherently complex and challenging. And field catalysts are often doing the work with limited resources given their systemic underfunding.

These dynamics can increase the difficulty of supporting retention and sustainability for field catalyst staff and leaders. SERN had a talented and committed team and we increasingly invested in the



development of skills specific to our field catalyst work as well as in generous financial compensation. However, SERN's continual responsiveness to the field and opportunities that arose left our staff stretched thin. This was one of [multiple factors](#) that contributed to the decision to strategically sunset SERN.

While we attempted to navigate these external and internal tensions the best we could with the skills and resources at our disposal at the time, we did not successfully resolve them. These challenges had significant, long-term implications for us strategically and organizationally.

In considering what we might have done differently, there may have been alternative ways we might have approached staffing and organizational development, as noted in the piece in this series on [field catalyst staffing](#). We also could have potentially offered respectful and more direct off-ramps to members of our community who no longer saw the organization as well aligned with their interests. Such off-ramps would have enabled us to honor these members' contributions while allowing us to focus limited staff capacity and financial resources on a more strategically coherent set of activities.