
Funding a Field Catalyst: Engaging Funders to Build Durable Buy-In

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SERN had a privileged beginning: we were founded with a three-year, \$2 million grant by the Raikes Foundation in 2014. But the area we focused on—students' experience of respect as valued people and thinkers in school—was not a topic many education funders were focused on. And the type of field-building work we engaged in was not something that many funders understood or built into their strategies—a [common challenge](#) for field catalysts that persists a decade later.

As a field catalyst, we learned to engage differently with funders for two key reasons. First, we had to engage and educate funders to more equitably and effectively resource an emerging field. Second, we had to grow our own funding base to support the field's development.

The following background on SERN's funding situation is important context for our lessons learned on managing funder relations:

Funding sources. Over an eight year period, we raised nearly \$20M. These funds came from six traditional institutional philanthropies (prominent private foundations with national strategies to invest in education) plus an unrestricted gift from the philanthropist MacKenzie Scott in 2021.

THREE LESSONS LEARNED

- 1. Field catalysts can benefit their own organizations and the field by taking funders on a learning journey with them.**
- 2. Engage with and advise funders for the good of the whole field.**
- 3. Field catalysts should equip funders to talk about their organization with both their peers and their leadership (and living donors, as applicable).**

Most of our grant funding came from repeated, multi-year investments in SERN by a core set of funders who saw varying sources of strategic alignment with SERN. Shifts in strategy among some of these core funders, along with larger trends in education philanthropy, created a poor long-term financial picture that was one (of multiple) reasons why we decided in 2022 that a [strategic sunset](#) was the most prudent path to continue field-level progress toward our mission.

Funding type. Nearly 80 percent of our funding was unrestricted—an unusually high percentage and crucial to our ability to be nimble and strategic in supporting the field and responding to a dynamic

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

- [Field Catalysts: The Versatile, Essential Tool Missing from Philanthropy's Systems Change Toolbox](#); a Center for Effective Philanthropy blog post summarizing insights for funders about how and why to support field catalysts
- [Reflections from a Strategic Sunset](#); an article on why and how SERN engaged in a strategic sunset in 2023
- [The Evolution and Impact of Student Experience Research Network](#); an article summarizing SERN's evolution and the results of an independent impact assessment
- [Sharing Power in Philanthropic Relationships to Enhance Impact](#); a brief documenting SERN's lessons learned about engaging with our philanthropic partners and regrating funds
- [An Inside Look at the Partnership Between Funders and Field Catalysts](#); an article illustrating how field catalysts and funders can partner to effectively advance systems change
- [SERN's Annual Funder Briefing](#); sample agendas, sessions, and links to a [detailed resource suite](#) on how SERN designed and planned these events
- [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



societal context in the United States during this time. We primarily recruited funders to invest in our overall strategy and portfolio of work rather than individual programs.

Regranting. We regranting 40 percent of the funding we received. We strategically distributed these funds via grant portfolios and fellowship programs to accelerate knowledge building in high-priority areas and expand and diversify the field’s leadership. A third-party assessment of SERN’s field-level impact found that our distribution of these funds [disrupted long-standing patterns in who was funded](#) by both private and public sources, including the hyper-concentration of funding in a small number of recipients and funders disproportionately supporting white people (and especially white men) at elite institutions. Our regranting also prioritized investment in collaborations and knowledge building that were not naturally incentivized by the existing structures in research.

In addition to the dollars they invested in SERN, our funders also provided essential non-financial support. Specifically, SERN’s institutional funders:

- Worked collaboratively with SERN to build support for SERN within their organizations and broker meaningful connections with their peer funders;
- Streamlined administrative burdens (e.g., proposal materials; grant reports; shared set of metrics aligned to our overall impact goals);
- Engaged in vulnerable and generative thought partnership about both SERN’s and their own lessons learned on strategy, field-building, and process;
- Provided access to new connections and tables, including hosting events for SERN, which enhanced our convening power and credibility; and,
- Elevated student experience and SERN’s published resources in conversations with others in philanthropy and the broader education field.

Below are three key lessons from our experience engaging funders as a field catalyst. To learn more about how SERN collaborated with its funders, read this piece on [sharing power with philanthropic partners to enhance impact](#) that we released as part of our strategic sunset. To learn about our funders' experience of partnering with SERN, see this article on the [value proposition to funders of partnering with a field catalyst](#) that features SERN as a case study.

Lesson 1

Field catalysts can benefit their own organizations and the field by taking funders on a learning journey with them.

Beginning early on, we shared in-progress lessons learned with funders because it often takes years to get results from the kind of studies we were supporting in education. I held these group check-ins two to three times per year with all SERN's active funders in addition to periodic one-on-one check-ins held with our program officers.

These candid conversations were important to building understanding and trust. They also provided our funders with midstream, process-focused lessons from the work that might apply in their own contexts, too, since all of them engaged with or funded research in some form. Like in any grantee-funder relationship, this foundation of mutual understanding and trust made for a more productive, flexible, and enjoyable working partnership.

This field-focused discussion informed our funders' broader investments and positioned us to recruit new funding from them to address emergent opportunities and needs.

As we evolved into the field catalyst role, that partnership took on even greater importance. We continued to take funders on a learning journey with us in these periodic group meetings but the scope expanded to include not just process lessons from our programmatic work but also reflections on the field as a whole. We increasingly discussed field-level strategy together.

This field-focused discussion informed our funders' broader investments and positioned us to recruit new funding from them to address emergent opportunities and needs. We learned from our funders' reflections, connections, and insights on the education field as a whole—vital information that shaped our strategy and programmatic work.

An unexpected benefit of these meetings was that our funders were able to engage directly with each other in dialogue; the meetings thus provided valued additional opportunities to build shared understanding and expand their influence with each other and their respective grantmaking priorities.

Lesson 2

Engage with and advise funders for the good of the whole field.

Beyond our own funders, we took a broader community of education funders on a learning journey with us, too. Each year, we held a [funder briefing](#) on new developments in the student experience field. Representatives from nearly 50 foundations and philanthropic intermediaries attended this annual briefing over the years, and both funders and speakers reported that the event was a unique and extraordinarily valuable learning experience.

While our funder briefings helped us recruit a larger group of funders to support SERN, their greatest impact was helping many institutional funders working in education begin to see themselves as in the business of student experience, regardless of whether they invested in curriculum and instruction, student health and well-being, or educator preparation. It became a new lens on their work that they “couldn’t unsee.” As one funder reported in the third-party assessment of SERN’s impact, “[The foundation I worked for] never funded SERN, but they fund differently because they learned about student experience.”

To learn more about how we designed and implemented these funder briefings, see this [detailed resource suite](#) that our team put together as part of our sunset.

In addition to our annual funder briefing, we also advised funders individually, regardless of whether they funded SERN. They would bring questions from their colleagues and their grantees, seeking

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a trusted, accessible source of information and counsel. We provided them with digestible content and made connections to people and organizations with aligned interests, carefully laying the foundation for more productive dialogue across silos with asymmetrical power and information dynamics. We also participated in funder-hosted brain trusts and provided behind-the-scenes feedback on their investments while still in the design phase.

Collectively, these efforts paid off at a field level. 95% of the 20 funders surveyed as part of the third-party assessment of SERN’s impact reported that their engagement with SERN led to increased application of insights from research on student experience in their work.



Lesson 3

Field catalysts should equip funders to talk about their organization with both their peers and their leadership (and living donors, as applicable).

We learned that it was critical to partner closely with program officers to help them make the case internally for our work. This was vital since, as a field catalyst, our work looked different than a traditional foundation grantee and our work continually evolved in its scope as we learned and responded to the field dynamically.

What this partnership looked like depended on the funder and their needs and context. It ranged from working with program officers on talking points for investment decision meetings to creating materials that they could readily share internally about our theory of change, impact, and programmatic lessons learned—all of which served as valuable updates that helped steadily accrue broader understanding and buy-in within their authorizing environment. We also supported funders and their consultants in crafting learning sessions for living donors to help cultivate greater awareness of our field and the importance of entities like SERN.

As part of our sunset, we conducted a third-party assessment of SERN's impact as a field catalyst, publicly documented our [impact and evolution](#)

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and other [lessons learned](#), and synthesized a set of [forward-looking priorities for the field](#) in part to help our funders make the case for continued investment in the field. It was also important to clearly articulate why SERN sunset and demonstrate that our funders' investments in SERN had been worthwhile.

A point that undergirds all three lessons is how essential it was that our organization as a whole understood funders and knew how to engage them effectively. While I bore ultimate responsibility for these relationships in my role as executive director and thus spent the most time with them, funder engagement was an important part of staff development at all levels of SERN.

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