CRITERION INSTITUTE

Guidance for Criterion’s Areas of Activity

Update 1.0
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Guidance for Criterion’s Areas of Activity

The purpose of Criterion Institute is to expand who sees themselves as able to use finance as a tool for social change. At the core, we are changing “how” social change happens. As a result, over the past 20 years, Criterion has had a significant focus on our “how.” Criterion’s six areas of activity reflect our assumptions about how we think change happens. They are also a reflection to the world that this kind of change is possible. Our activities are not only accomplishing our goals; they are modeling a way of doing things.
Criterion has three values that have been the core of the organization since our founding: grace, hospitality, and the power of invitation. These values shape our priorities in how we implement our work. They inform the practices that translate our values into the day-to-day implementation of activities. Our work fundamentally challenges norms and assumptions about how things get done. We are attentive to how our practices allow us to either navigate systems of power effectively or disrupt them elegantly. Our distinctive Criterion practices incorporate our values and our commitment to reimagining power in how we go about our work. We approach our work rooted in our mission, our values, our theory of change, and our overriding commitment to transforming power relations.
Over the last 20 years, we have experimented with how to advance system change work. The six areas of activity that we outline in this document represent Criterion’s theory of how change happens in the world. These areas of activity follow a consistent thread throughout our history. While the categories and names may have shifted, the underlying practices are consistent and have been built over the past two decades.
## Defining the Areas of Activity

### Scope and Scale of Audience

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<td></td>
<td>Encourage individuals or institutions to take specific actions</td>
<td>Shape a field of actors, activity, or ideas</td>
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**Quick tip:** DIFALT, is a useful pneumonic for remembering the six areas of activity. Criterion’s six areas of activity can be organized along two axes: the scope and scale of the audience and the intended result of the activity.

### By the scope or scale of the audience:

- Teaching, Design, and Influence are more targeted activities, focused on a specific individual, organization, or context. Teaching activities build capacity of a specific group of people. Influence targets individuals or institutions to use their power to shape or to take specific actions. Design activities focus on how specific processes, structures and analyses in finance could be used to create social change in a context.

- In Learning, amplification and Field Building, our target is not the individual or the institution, but the field of actors, activity, or ideas. Through Field Building, we highlight the collective nature of the work and create experiences where individuals see themselves as part of a community with a shared purpose. Learning activities foster shared interpretations of how systems change happens. Amplification broadcasts what is possible with increasing volume to a wide audience but does not have a specific target.

### By the intended result of the activity:

- Teaching and Learning both build understanding. Teaching focuses on building the capacity of individuals or institutions by providing them with training or tools to increase their understanding and therefore their confidence in using finance to create social change. Learning activities shape understanding of how to do systems change work and how that understanding would then inform the development of strategy.
• Design and Amplification foster imagination. Design does this through developing insights and demonstrations that show what is possible in using finance as a tool for social change. Amplification broadcasts stories, reframes ideas. It shifts whose voices are heard in order to spark a broader imagination of what is possible.

• Influence and Field Building cultivate an individual or collective will to act. Field-building shifts the norms and collective purpose within an audience. Influence increases the political will of an organization or the bravery and determination of an individual to use their power to shift power dynamics at a systems level.

Strategic Context
Criterion’s areas of activity sit within a broader set of organization frameworks: our values, the pillars of our strategic plan, and our programs. Our 10-year strategic plan has five pillars. These are the directional goals that will advance our mission.

1. **Invite Financial Imagination**: Social change organizations design and implement strategies that use investments and engage systems of finance into their work to increase social and gender equality.

2. **Finance the Reduction of GBV**: Social change organizations, governments and investors design and implement strategies that effectively use finance to reduce gender-based violence.

3. **Shift Narratives in Innovative Finance**: Actors working in innovative finance actively address power, privilege, and bias through investment process, structures, and analysis in order to advance gender equality and social justice.

4. **Unleash the Power of Policy**: Government agencies use their power to align their innovative finance programs with the boldest ambitions of their social and gender policies and, through that influence, increase what is expected of organizations using finance to increase gender equality and social justice.

5. **Value the Future of Equality**: Investors assign value in their investments today through a methodology that recognizes a future where social change organizations have achieved social justice and gender equality.

We advance these pillars through our programming as each program has outcomes tied to the strategic plan and targeted to impact specific audiences. We have three core audiences that we seek to change: organizations, investors, and governments. Our focus on these audiences shapes our assumptions and ongoing learning about what creates change within each audience.

Programs at Criterion are fluid. They define the short-term priorities of the organization and organize resources to respond to opportunities for systems change. Whatever the current priority, the “how” does not change. Each program is organized to implement through our six core areas of activity.

Criterion’s areas of activity organize how we get things done day-to-day. Each of our programs names outputs tied to these areas of activity, which lead in turn to outcomes tied to the pillars of our strategic plan. Programs produce outputs through the areas of activity leading to outcomes.

These distinct activities inform the Design of our work, our priorities both internally and with partners, and the roles of team members and partners. As an organization, we have developed cross-cutting processes, including events and knowledge management, that make the core activities operational.
Implementing the Areas of Activity

At the core, the six areas of activity at Criterion define what our work is (and what it is not) and how we implement it. As we continue to deepen our knowledge of our audiences and create stronger feedback loops between our actions and our ability to achieve our outputs, we will continue to hone our approaches across each area of activity. In the end, we will strengthen our ability to live out our values as we achieve our mission.

Areas of activity are intended to translate between the complexity of the systems in which we work and our ambitions to challenge power dynamics so that new, more equitable possibilities can emerge within systems of finance.

Each area of activity:
• determines how and when we do specific tasks,
• leads us to prioritize one task over another,
• enables teams to work efficiently within shared, standard Criterion processes and practices,
• defines the goal or the output of the task in the context of systems change goals.

We do not organize work plans, however, in line with the areas of activity. In day-to-day life, a task may contribute to multiple areas of activity. Criterion has made it our practice to get multiple things done in each of our actions. Different areas of activity overlap intentionally within a work plan.

For example, a program team decides to implement an event. The event itself is intended to teach. Naming the purpose is important so that the team can be authentic in their invitation and intentional in designing the content and facilitation approaches. In the case of this Teaching event, the personalized invitation to the event for an individual or organization may be a cultivation step in an Influence campaign that allows us to build relationships and trust which might lead to an opportunity to Influence attendees toward a specific action. If the event is open to any, broadcasting the invitation to the event may contribute to Amplification goals. A set of stories or quotes from the event may become content for other Amplification activities. Insights for a new vehicle design or an approach to an investment process might emerge from the discussions in the training event. Those insights can feed into a Design process. The participants in the training may take the confidence built in the training to become an important voice in a Field Building activity. In that moment, we are no longer seeking to build capacity as we did in the Teaching event, but to reinforce a collective ownership of possibilities. And finally, response and feedback from the audience may result in Learning as we discover something new about the topic, or about this audience, or about how we teach.

To manage these threads that run through the work, we have standardized processes around events, publishing, knowledge management, relationship management, communications, and brand management. These processes are managed by the Program Operations Team to ensure efficiency and consistency.

Within and among the areas of activity, we have developed what we call Criterion Practices. These are distinctive disciplines, approaches, or techniques that we regularly employ in our work of empowering people to use finance as a tool for change. Criterion Practices are ways of operating that we have repeated until they have become habitual for us. We keep doing them because they are both effective at advancing our mission and reflective of our deepest values and commitments. They have become emblematic of Criterion practice at its best. These practices will be described throughout the document.
Transforming Power Relations

Each area of activity reinforces Criterion’s commitment to transforming power relations, integrating that commitment into how we do our work every day. Transforming power relations requires a use of power. We are conscious of and responsible for the ways in which we exercise our own power as we seek to empower other people and transform how power operates within relationships and in broader systems of finance.

A few general principles for transforming power relations are relevant in all the areas of activity:

- Practice seeing and analyzing power structures and how they play out in the activity in which you are engaged. With these observations in hand, identify leverage points and explore interventions that challenge systems of power in different ways. What would shift the power dynamics? Would that result in a different outcome?

- Assess your own power in context and determine whether and how to use that power to disrupt systems of power. Few can challenge systems of power alone. It is too easy for the system to resist and disqualify the efforts. Collect funding, allies, vision, data, and stories from a range of actors and collaborate along the path. Sometimes, using our power may mean that we step aside, create space, or ‘hand the microphone’ over to others who we would like to have more power in the system (for example, women’s rights organizations in colonized countries).

- Disruptions require discernment and intentional choices, based on calculation of risk against potential impact, to determine the efficacy of a move. It is easy to go along with limited assumptions of the potential to challenge existing power structures. It is harder—but necessary—to make assumptions explicit so that they can be examined intentionally in theories of change.

- Systems change is a long process and therefore requires feedback loops to assess progress from a range of perspectives over time. Use process metrics and other indicators to track the capacity of partners to address power dynamics within a system and to provide benchmarks to measure against.

Unpacking the Areas of Activity

The sections that follow clarify and explore the implications of each of the six areas of activity. The purpose of going deeper into each activity is to lead our team and our partners to understanding, imagination, and the will to act, just as the activities themselves are designed to do.

Each section will include:

1. A summary and definition that outlines the why and how of the area of activity
2. Alignment with the three values of the organization
3. A description of how this activity leads to change within our three audiences.
4. Approaches to analyzing or addressing power dynamics in implementing this activity
5. An outline of the connections and dependencies with other activities
6. Naming practices that are important to this activity
7. A set of questions for discussion or reflection
These areas of activity are reinforced through the strategies and tactics that make up our work every day. They inform both in where we focus our attentions and where we choose to not expend resources. The give structure to how we invite people into our work, and where we draw boundaries.

Criterion’s work challenges systems of power. To do that, we do not do business as usual. This is our how.

For Discussion or Reflection
Throughout the document there are questions or simple activities that can further your thinking about each of the areas of activity and Criterion’s theory of change overall.

1. What are your assumptions about how change happens? Where have you been surprised?
2. How have you seen power dynamics at play in how you have worked to create change? How did you respond?

A Simple Start
Have a conversation with a friend to reflect on Criterion’s theory of change. Work to have the conversation focus on engaging rather than explaining.

• How did you frame the theory of change in a way that makes sense to someone not at Criterion?
• What stories did you tell?
• What worked in your framing? Where did you get stuck?
• What surprised them? What intrigued them?
• What new possibilities were created in the conversation?
• What did you discover?

Now, imagine the conversations you want to have next to build on what you discovered in this conversation.
Learning

Make sense of what creates systems change

Summary and Definition

The purpose of our organization is to expand who sees themselves as able to use finance as a tool for social change. We are continually engaged in Learning so that we can do that better. Learning drives our fundamental reason for being. We cannot succeed at our mission without the insights, reframes, and breakthroughs that come from sustained Learning.

Many organizations claim to be learning organizations. We are a think tank. We have built a culture and a set of practices that prioritize intentional processes of thinking and Learning in our day-to-day work.

Our synthesis calls are used in different ways, but fundamentally they create a space for Learning and processing. Not doing. Thinking. Learning drives how we develop, shift, or end programs. Each of our partnerships includes Learning together. We do not deliver our expertise to our partners, instead we invite them into process of Learning together. We include how we partner with others to learn as part of projects. This is a collaborative activity. We learn with others not just about others. We regularly reflect on systems change, audiences, and our theory of change with the Advisory Boards of each of the pillars of our strategic plan.

For Criterion, Learning is more about knowledge creation than knowledge consumption.

Learning is a complex process of coming to understand and make sense of things. Learning happens through study, experience, paying attention, listening, analyzing, synthesizing, discussing, thinking, ruminating, and much more. It requires concentration and discipline and lively partners. It includes careful collection of information, deep reflection, and flashes of insight. It is a process that is both interior and collaborative.

At Criterion, our Learning is directed toward understanding more and more how the world creates social change by using or shaping systems of finance. That involves investing significant time and resources in at least three areas of Learning: 1) making sense of how systems change, 2) understanding the audiences with whom we work, and 3) reflecting on the “how” of systems change work.

Learning about systems change

Our “go out of business model” is to have integrated the use of finance into how the world creates change. To do that, we need to shape how the world learns: what they measure, how they evaluate their efforts. Our approach challenges existing assumptions about how change happens. Two examples:

In process standards work, the prevailing assumption is that naming outcomes is the most important way to push finance to change. But we now know that we need to push to change the how, not just the intent.

Right now, most people measure success by the volume of capital that moves. To shift that indicator, we need to shape systems of measurement. What is measured matters, right? How do we value shifts in power dynamics that are not represented in how much money moves?

Learning about our own systems-level impact also enables us to track progress against the pillars of our strategic plan. Learning guides Criterion to tell the story of its impact. Sustained Learning creates feedback loops around systems-level change, supports reflection on systems change, and forms the basis for innovative program development.
Learning about audiences

We have three core audiences: governments, organizations, and investors. To shift their behavior and invite them to use their power we need to understand the political economies of institutions we are seeking to impact and what creates the conditions for impact. We collect and interpret data about our audiences, but we also engage them in reflecting on what we are learning about their context.

To learn with them, we need a deep understanding of their theories of change. We need to understand their assumptions about what creates change and the practices by which they test and measure those assumptions. One key piece of the puzzle is to shape and to re-shape theories of change, collaboratively.

Learning about how

As reflected in this document, Criterion has long focused on the “how” of systems change. Reflection on our actions will continue to deepen our knowledge of the six areas of activity that drive our work. The current documentation, including this paper, capture our understanding at a point of time, but that will continue to evolve.

We are building the organization around these activities. Therefore, we need to also learn what it takes to be an organization which does this kind of work. This is useful for our own management systems, but it is also useful for our partners who are working to build bridges into using finance to create social change in similar ways. What we learn about being an organization with our theory of change can be shared with other organizations working along similar lines.

Alignment with Values

Grace

When grace is a fundamental value, we trust that there is a pathway to a better future and that we are partners in discovering it. Learning is that ongoing, intentional, collaborative, surprising process of discovery that undergirds all the activities through which we accomplish our mission.

Hospitality

Radical hospitality creates an open, inviting environment for Learning by welcoming the contributions of strangers and friends with varied perspectives and expertise. Learning together, with everyone both giving and receiving, captures the essence of hospitality.

Power of Invitation

Invitation has the power to expand, strengthen, and deepen pathways to participation in the process of Learning. Such participation leads to richer discoveries, fuller understanding. Through our practice of invitation, we experience and model for others a mutuality in Learning that challenges the privilege commonly associated with certain kinds of knowledge or expertise.
How This Activity Leads to Change

Investors

At their best, investors are driven by Learning. Foresight drives their ability to make decisions, to process what worked, to adapt, to be able to watch and predict where change is happening. Unfortunately, the industry has become specialized and routinized, and machine learning dominates. The fundamental investors seeking to understand companies and economies are lost in a sea of quantitative analytics.

When investors encountered impact, many of them stepped into a new phase of Learning and questioned their assumptions. But another bunch simply pushed to translate how organizations learned about impact into a set of numbers, a return on investment, or a grand harmonized system of data that tells them how many people were affected by the change. This approach does not lead to Learning about how change happens. We invite investors to reflect on and to understand how their actions can lead to equitable change.

Organizations

Organizations seeking to create social change know the value of learning about how to create change. Measurement, evaluation, and learning are built into programming or strategy development for most organizations. It is a recognized strength.

Many of the ways organizations learn about impact, however, do not support understanding about what creates systems change. There is even less collective wisdom in organizations about how to create systems change tied to finance and investments.

When organizations begin to carve out time and develop practices to learn together about creating systems change using finance and investments, they are expanding what they already know about measurement, evaluation, and learning. Learning together how to do this well will reinforce their commitment to the work and their confidence in their role as players at the interface of finance and social change.

Governments

Wouldn’t we love it if our governments were learning organizations? The political economy of government makes it hard for them to learn in ways that lead to systemic change. Often their practices of learning are constrained by strategic positioning.

Governments commission big studies, and anyone who gets government money is required to reflect on what they learned within the process. That Learning can be powerful. When Criterion receives government grants, we can use the reports we submit on our Learning to influence the decisions that governments make.

Governments will pay for Learning because they know the value. Therefore, shaping what questions governments are asking as part of their Learning can determine what information organizations and agencies collect, as well as the decisions governments make.
Analyzing and Addressing Power Dynamics

Key power dynamics
We each have a desire to learn for our own enjoyment and to build our competence and confidence. The fact that some have more opportunity to learn than others reinforces a power dynamic around expert knowledge.

Space to think and learn is always a privilege.
Innovating in systems of finance is a relatively privileged activity, with finance experts taking the lead and those affected by the problem the innovation seeks to address seldom involved in designing the solution.

What gets funded is often driven by the agendas of foundations, governments, and other donors. The individuals who have the privilege to give the money away can shape and decide about proposals, but their agendas in turn are informed by the results of evaluation and systems of measurement. Power dynamics are also infused into who gets to decide which types of change and learning are valued and measured and how this valuation and measurement occurs.

Approaches to Addressing Power Dynamics
Learning together, internally and with our partners, should align with feminist practice: intentionally seek to understand other perspectives and experiences and unpack any unconscious biases, privilege or historical contexts that shape our interpretation of learning and success. This can surface different values and solutions in our understanding of change and transformation.

Naming Learning as a collective process deconstructs the expert status as the one who holds knowledge that others lack. Learning is a collective process of creating knowledge, wisdom, and understanding collectively.

- Question expert knowledge. Do not assume there is a set body of knowledge that we need to go out and learn to be able to perform expertise.
- Be aware of the barriers that others face in engaging in collective learning processes.
- Design processes of Learning that do not extract data without giving people the ability to participate in the Learning.
Connections with Other Activities

In Learning our target is not the individual or the institution, but the field of actors, activity, or ideas. Learning activities foster shared interpretations of how systems change happens. They also shape how the field defines success and how that understanding would then inform the development of strategy.

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Amplification

The process of Learning with others creates insights about what more is possible that can be broadcast through Amplification. As we get louder, we can also tell stories about our own impact and what we learned from it. What worked and why?

Field Building

Through standards we are seeking to shape how the field learns, evaluates, and measures programs and investments aimed at creating social change. Part of work of Field Building is about how we engage actors and get collective buy in. Another part is about capturing, synthesizing, and creating a system that shows an asset owner how to determine whether an investment is shaping power dynamics...and how what we learn from that evaluation shapes future strategy, in the world, not just here. We are changing how the world learns. The outcome of Learning is better strategy, because there are better indicators about what will lead to success. The measurement systems in impact investing need work.

Design

Learning informs what kinds of innovations in finance and investments are needed to create systems-level change. Design focuses on the specifics of the financial analysis, process, or tool. Learning focuses on the impact of those specific shifts.

Influence

Our learning about our audiences creates the basis for the political economy analysis that defines our approach to influence.

Learning at Criterion is not just about our Learning; it is about shaping the logic models of the world and shaping how the world learns. I said to Samira when I asked her to work on process standards... “imagine you are creating a logic model for the world and how they should think about change.” Learning activities can lead into Influence to be able to shape how organizations make choices and use their power.
Teaching

Insights from synthesis feed into our Teaching activities. They become the case studies that inform our Teaching about how using or shifting systems of finance can create systems change.

Learning helps us understand the audience we are teaching, and it also helps us teach what we have learned about our audiences. The knowledge we collect about investors and what drives them can be incorporated into training for systems change organizations. Or our learning about governments can inform our guidance for investors.

Relevant Practices

The following illustrate how we translate our values into day-to-day practices that support the implementation of these activities. These practices are relevant to many areas of activity and are not unique to Learning.

Documents where we think all the thoughts.

While we have frameworks that we use as starting places, we rarely begin a new set of work with a structure for analysis. The spreadsheet which tracks data against a set of examples requires that you know the categories of data to collect. Playing within a Thinking all the Thoughts document allows those categories to take shape. As the categories emerge the data can be transferred to spreadsheets for continued analysis or into a more formal outline of a document that captures what was learned.

As an example: In the process of creating this document, we created a “thinking all the thoughts” document where we could process the abundance of knowledge and frameworks collected over the past 20 years. Over the months of synthesizing this knowledge, we developed and refined taxonomies that were useful to understanding these areas of activity. Those became the sections of this document. For example, the section on “how this activity leads to change” came from wrestling with how to connect the areas of activity to audiences. But first we needed to have a place where we could bring together and synthesize the content.

While “thinking all the thoughts” documents are cumbersome and often overwhelming, they do two things: they allow for collective sensemaking so that teams do not divide and conquer their own piece of the elephant before seeing the whole, and they circumvent investments in structured analysis before we’re sure of the categories of analysis. They keep us from drafting an outline of a document before we have a clear framework in which we are making our argument or building our strategy.

Conversations that have No Particular Point.

Well…. the point is the relationship.

Criterion has always valued conversations that do not have a particular purpose. You don’t know where it is going but it may take you somewhere. These conversations go a long way toward relationship building. They are open ended. We are not trying to get something or impart something but are simply engaged to discover where we might go together.

The act of trust for the other to join the conversation is an invitation for us and from us to join without an agenda, reveling in the surprises the conversation may bring.
Three Conference Calls

Over the years, Criterion has often deployed what we call the “3 Conference Call” tactic. This is generally used when there is an open-ended question we are trying to sort through. For example, when we started our work on medical debt, we brought together a bunch of leaders in healthcare to help us reflect on whether there was a “there” there. We also used this practice to develop the denominational roadmap on GBV.

The practice is simple. You invite a set of leaders to a series of three conference calls, each 90 minutes long: first call to explore the issue, second to wrestle with some stuff, the third to determine what to do next. We do a set of synthesis between each call to be able to advance the conversation.

This practice allows people to say yes to an invitation that has a defined scope. It creates an easy structure for us to learn and process with others. We decide together whether it is worth more conversations.

For Discussion or Reflection

Included throughout the document are questions or simple activities that can guide your reflection and deepen understanding about each of the areas of activity, and Criterion’s theory of change, overall.

1. What have you read here that confirms or reinforces ways of working/doing things that you have learned and trust?
2. What have you read here that challenges your assumptions about how things should be done?
3. What in this section touches your heart or deeply held ethical beliefs?
4. What is one thing (and maybe more) that you will have to think about doing differently as part of the Criterion team?
5. What skills or attributes do you have that make you wicked good at these activities?
6. Where do you have questions or reservations about how Criterion approaches this activity?
7. What is a simple first step to practice this area of activity in your daily work?

A Simple Start

What are the systems that you use to do your thinking and synthesis? Review those systems and your own practices of Learning.

- How do your systems ensure sustained thinking?
- Do you carve out space and time to think and reflect?
- What are the pressure points that push your thinking to transition into concrete learning outputs?
- We often set goals to learn “about.” How do you learn “with?” How could your individual practices become collective practices?
Teaching

Build capacity through training and tools

Summary and Definition
Criterion trains and provides tools that support individuals and institutions to have the competence and confidence to use finance as a tool for social change.

Our Teaching begins with the reframe that finance is a system that people made up, and therefore people can change it. Our two signature training programs, 1K Churches and TOOLKIT, take apart how things work now to show that they could work in a new way. We are not teaching how things work but encouraging people to see how they could work. The tools we build in each program also provide the resources to experiment, to engage, and to imagine new possibilities.

We empower participants to identify areas where they want to make change, to think critically about the challenges involved, to discover new possibilities for approaching the issues, to imagine and take action toward change, and to learn from reflection on that experience as the basis for further action.

We teach by breaking apart the components of systems and explaining how the individual elements work. From this grounding, participants learn how they can put them together in different ways. We tend to teach not from case studies. Case studies are effective because they show what has been done. We are teaching to expand understanding, but the topics cannot be limited to understanding that which has already been proven. Our Blueprints, for example, intentionally, name few case studies, but rather describe the components necessary to build a strategy.

Our teaching is segmented into two audiences:

Teaching those who are fluent in finance to understand how to analyze or address power, bias, and structural inequities.

For people who work in finance, we provide guidance for how they can address power dynamics in their investment processes.

We do not try to convince them that they should learn. Without permission to challenge their thinking, Teaching about power dynamics can be dangerous. We only teach those who are asking to learn.

We once received feedback from a partner who conveyed that their investment managers said that in our training discussion about power dynamics, bias, and privilege was hard for them to hear. It was suggested that we could have found ways to make the discussion more palatable for them. Really? At the core, our Teaching will challenge their thinking.

We create spaces where they can be challenged. In part we do this by showing that we understand their world of finance. TOOLKIT is reassuring for people who work in finance because we are beginning with what they already know. The cards are about finance, and that is a base on which they can build.
Teaching those who are fluent in social context how to create change that leads to equity to be able to use finance as a tool for social change

We teach social change actors to use finance as a tool for social change. For most of them finance is alienating and opaque.

With those not fluent in finance, we teach in ways that are intentionally designed to help them feel comfortable, participate fully, and to contribute their wisdom and perspectives.

In that process, we may introduce them to some financial terms and concepts to facilitate their participation, but that is not our primary goal. We are not teaching financial literacy but inviting a financial imagination. Literacy teaches how to use the current system; we teach how to change the system.

Criterion’s training events are inviting, participatory, practical, and engaging. Our Teaching work lowers the risk for people who are trying out something new, walking into what is seen as dangerous territory.

Alignment with Values

Grace

We say grace is based in a fundamental sense of goodness beyond what we can see or do in the moment. Grace then is reflected in the activity of Teaching when we invest our energies to draw out the potential of others and build their capacity to do things that they cannot yet imagine themselves.

Hospitality

Hospitality is radical openness to the other to the extent that host and guest enjoy a mutuality in which both give, both receive, and each is changed by the encounter. So, it is with Teaching when the learner is welcomed as one with much to contribute, when the material is made accessible even to the most marginalized, and when the process results in new capacity and empowerment.

Power of Invitation

Invitation has the power to expand, strengthen, and deepen pathways to participation. Teaching activities lead to greater participation when they draw people in and create an environment where learners gain the knowledge, the understanding, the tools, and the confidence they need to take the first step in using finance as a tool for social change and the encouragement to go further and deeper.

How This Activity Leads to Change

Investors

In Teaching, the investor audience is the most straightforward. There is widespread agreement among investors that they want to have technical assistance to support the gaps in their knowledge about gender and social issues more broadly. Teaching in this case builds the capacity of investors to use their power to disrupt power dynamics in finance. Importantly, we are focused not on investors moving their capital but using their power.
**Organizations**

It is not obvious that social change organizations want to learn about finance. In fact, we spend a good amount of time cajoling leaders to engage.

To fund us, governments and philanthropists sometimes ask us to prove that there is demand. Organizations, particularly those working in social justice are under-resourced. They don’t have the space to engage. This is an area where they need to stretch and do not have the capacity.

Therefore, this work is slow going and we need to ask for the trust of our funders so that we have the space to invite people into this adventure with us.

**Governments**

Technical assistance is the mainstay of development efforts. Governments understand the need to pay for capacity building, as it is often the leverage that they have within a broader investment environment. They can use technical assistance as an incentive for other changes. Our work with governments pushes them to ask for more from technical assistance. This could be to ask investment managers to not just buy the business case but to live up to a set of process standards. Or this could be paying for support for local actors to do design. Too much TA goes to “fix the company” rather than to “fix the capital” to meet the needs in the economy.

**Analyzing and Addressing Power Dynamics within this Area of Activity**

**Key Power Dynamics**

Teaching is closely tied to expertise. Experts have the power to name what knowledge matters, what data is legitimate, what complexity is tolerated. Reliance on experts reinforces traditional privilege, unless we make an intentional effort to validate unorthodox expertise and bridge across disparate knowledge.

Our learning processes are intentionally designed to assist those with limited background in the subject to feel comfortable, participate fully, and contribute their wisdom and perspectives. We do not limit what information someone has access to. That means our training programs are sometimes overwhelming.

Much of the technical assistance in the field of gender lens investing focuses on making the case to pay attention to gender and power. We stay out of making the business case because that is an endless loop. People can continue to sit in their own bias to say we have not yet made the business case. There is almost always bias built into the demand for more data or more evidence. We have, for example, never had to prove that all male boards are effective, but we have spent several decades proving that adding a woman improves governance.

We can invite people to learn, but until they take up that invitation, we cannot effectively teach. There is resistance to learning about power dynamics if you did not agree to learn. And there are power dynamics when we try to teach finance to those who haven’t asked to learn. That’s just condescending.
**Approaches to Addressing Power Dynamics**

We pay attention to who does not have access. We seek to adapt our tools and training programs to be more accessible to those who are more marginalized from finance. This requires adaptations in language, reading level, or cultural style.

We are aware that funding creates barriers to participation. We often seek funding that can support broader participation.

Our role is not to ensure access. Our audience is limited. Not all organizations are able to engage. We invest in people and organizations who are early adopters, who are used to working at a systems level. Finally, we work with people who feel responsible for their own hope.

We keep the content and processes of Teaching open. We do not decide for those learning what knowledge they should have access to, what they are capable of learning. We make tools available for people to learn on their own terms and at their own pace.

**Connections to Other Areas of Activity**

Teaching, Design, and Influence are targeted activities focused on a specific individual, organization, or context.

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**Learning**

Teaching and Learning both build understanding. Teaching is about taking what we know and using it to build the capacity of others to use finance as a tool for social change. In Learning, we step out of the role of teacher so we can discover with others what is working and what is not so that we can improve.

Ultimately our Learning activities seek to shape how the field evaluates success or failure, so that the results of our Learning can shape better strategy. Such Learning should help us determine who needs to receive Teaching to do what, what capacity gaps are recognized, and therefore who is given resources. For example, if a landscape report names that there are not enough investors, then we might design technical assistance programs to be able to make the case to investors. But what if the real problem was with power dynamics in the relationships between investors and others? If our practices did not lead us to see the deeper problem and learn from it, then the problem goes unaddressed.
Amplification

Amplification helps prepare the way for effective Teaching. Often our Teaching takes more of our effort than it needs to be because we don’t yet have permission to teach. We move into a Teaching model before people are ready, before they have seen the possibilities. We need to broadcast possibilities longer before we shift into equipping people to act.

Sometimes it takes a whole set of Teaching around how finance works for folks to even get to the place where they can see something as possible. Too often, however, we invest in a whole learning or discovery journey, when it may have been more efficient to amplify the possibilities broadly first. We can reach people in many ways through Amplification and only take the time for Teaching when people are ready and willing to learn. Teaching, whether through developing a tool or organizing a training, takes significant effort. Teaching doesn’t have to be the starting place. Broadcasting messages may lay the groundwork more effectively.

Field Building

We see our role as building the capacity of the field to teach. We want to help the field build understanding and capacity through training and tools. We don’t want to be the technical assistance providers on gender lens investing. We want to equip organizations to serve that translation function. Therefore, if we are teaching an investor to use finance as a tool for social change, it is so that we can demonstrate the outcomes to spark the imagination of a wider circle of people to use finance as a tool for social change, and so build the field.

Design

We often use a Design process to teach, which means these two areas overlap. In TOOLKIT sessions, we work to balance Design and Teaching. People learn better when they are applying their work to something tangible and meaningful in their world. It is important, however, for us to name whether Design or Teaching is the primary focus so that we don’t fail at both!

Most often, trying to combine Teaching and Design in a one-off session doesn’t work well for either. This overlap has been most problematic when we are asked (or we offer) to do a single session that teaches and creates a new set of possibilities. Those sessions have produced some creative ideas, but they are usually quite early and not well developed. We need enough time to have sustained engagement where we can do both Design and Teaching and weave together in an intentional process.

Influence

Teaching tools are important on their own terms to build capacity of individuals and institutions who already have the will to act. Teaching can lead directly to action. Teaching tools may also be used as part of the Influence process. For example, on-ramps or blueprints may be required for institutions to see that they can take an action or implement a program. It is important to be clear that the first activity is Teaching; the second is Influence.

If they are not yet wanting to learn, then the work is Influence. While teaching is influential, it is too costly and too complicated unless they are ready to learn.
Relevant Practices

The following illustrate how we translate our values into day-to-day practices that support the implementation of these activities. These practices are relevant to many areas of activity and are not unique to Teaching.

Asking for Permission to Teach

Teaching is not something we do to someone; it is something we do for them. For that to work, they must invite us to teach. In asking permission, we appropriately constrain the value of our expertise. Our expertise is only valuable if someone else sees it as such. If they invite our expertise.

Breaking into Component Parts (and putting them on cards)

Participants in our TOOLKIT workshop are encouraged to choose a concrete social issue that they want to affect and to focus on that issue throughout the learning experience. These leaders and change makers are then able to design and execute social change strategies using finance within their own spheres of influence.

1K Churches is usually a congregational activity, and it would be even more powerful if it were embraced by a denomination or by many congregations working together. TOOLKIT is most effective when it is sponsored by an institution or a social change organization or an innovative finance consortium.

Designing a Facilitation Agenda

We create facilitation agendas for all events or meetings, not just for Teaching. Agendas often have a list of objectives but don’t name the plan for accomplishing the objectives.

It is not just what you want to teach that is important, but how. Teaching is about process as much as content. The facilitation agenda spells out the “how.” In the facilitation agenda, we work through the goals of the session, the dynamics that we expect to see in the room. For each step in the agenda, we design a process to teach, and then we sketch a second or even third process as a back up if the first one doesn’t work. We think through what materials need to be.

Criterion is not just about the content; we are about the pedagogy.

Framing and Reframing

This practice of framing and reframing crosses most areas of activity. Frames provide structure and focus through which things can be seen more clearly. Reframes start with how someone sees things and invites an alternative view. For example, most technical assistance in finance works to improve companies so they can take capital. What if we fixed the capital not the company?

We often teach through reframes.

1K Churches training is ground in the reframe that finance is not about money but about economic relationships. In 1K Churches the action/reflect model plays out as participants not only learn to think about economic issues in terms of their faith, but also put what they have learned into practice by making a small loan to a small business in their community. All the teaching materials, the detailed loan implementation guides and sample contracts, applications, and rituals for the blessing of loans, reinforce the importance of seeing the loan as about relationships not money.
For Discussion or Reflection

Included throughout the document are questions or simple activities that can guide your reflection and deepen understanding about each of the areas of activity, and Criterion’s theory of change, overall.

1. What have you read here that confirms or reinforces ways of working/doing things that you have learned and trust?
2. What have you read here that challenges your assumptions about how things should be done?
3. What in this section touches your heart or deeply held ethical beliefs?
4. What is one thing (and maybe more) that you will have to think about doing differently as part of the Criterion team?
5. What skills or attributes do you have that make you wicked good at these activities?
6. Where do you have questions or reservations about how Criterion approaches this activity?
7. What is a simple first step to practice this area of activity in your daily work?

A Simple Start

In the TOOLKIT box or on-line are a set of cards that play out different elements of finance.

Pull a set of them and imagine a process that could be incorporated into a Teaching tool or event where participants could play with cards and explore power dynamics in an element of finance.

What is the process? The design of process should enable a participant to jump in based on the instructions. What are the specific instructions? What do participants need to have learned for them to engage in this exercise? What are the risks in the execution? What are alternatives if it goes off the rails.
Amplification

Broadcast that more is possible

Summary and Definition
Amplification is the broad dissemination of our ideas and the ideas of our community in order to promote a wider sense of their resonance and legitimacy. Amplification both strengthens Criterion’s power to use finance to create social change and provides aircover for change makers making bold moves. The objective is to package our content effectively and publish frequently so it is noticed and demonstrated in the world.

Consistent and strategic Amplification of the possibilities of disrupting power dynamics and using finance to create social change brings attention to our activities and those of others in the field. Amplification provides all of us with the legitimacy needed to engage and influence others, to have our invitations accepted when we invite others into our work, and to be invited into the work of others.

In Amplification we are sowing seeds. We are broadcasting insights, stories, reflections, to spark imagination. We don’t know where they will land, and we don’t need to overengineer it. Rather than crafting a specific conversation, we are steadily increasing the volume.

We need to be loud. Loud enough to be heard through the noise. Being seen and heard is a goal in and of itself, not just a means to another end. If we think of Amplification simply as the distribution of invitations to or the results of other areas of activity, we miss what is possible to accomplish through Amplification. Our visibility, our voice, creates openings through which others can speak with more authority than they had previously.

Partnerships are integral to Amplification at Criterion. Our partners radically extend our ability to reach our audiences beyond our immediate network of relationships. They provide a context for the information and can enhance the credibility of the ideas. When we turn up the volume of our voice, we also amplify the voices of partners who may not have the same level of power.

Amplification is about possibilities, not about proof. Amplification uses the currency of our insights, the power of voice, a broad network, and multiple communication platforms to introduce change makers and the wider public to the power of using finance as a tool for social change. We package our content so that it will be noticed and spark imagination in the world. We want others see what is possible. It is about sharing information boldly and strategically.

A few principles inform our approach:
• **Frequency:** We need to be putting out ideas constantly. Not in big bursts.
• **Repetition:** We need to say the same thing over and over and over for it to have resonance.
• **Accessibility:** We need to say things in a way that they can be heard by our audiences.
• **Boldness:** We take risks in amplification. We say things before they are proven. We don’t hold back.
We aim to broadcast insights early to see where they might be useful. We package and repackage our resources to give broader access. We’re not waiting to get it all right. We are inviting people into a conversation already in progress.

Amplification is driven by generosity and gratitude. In Criterion, we have the privilege to be able to explore ideas and engage in conversations that few others have.

Alignment with Values

Grace
Amplification creates surprise. The insights we share, the demonstrations we highlight, and the stories we tell about using finance for social change catch strangers off guard and grab their attention. We don’t orchestrate where specific ideas will land. We put them out in the world and trust that some -- enough -- will find responsive audiences, open cracks in established norms, spark new ways of thinking, and ignite imaginations. Where it all ends, we cannot see.

Hospitality
Amplification is rooted in the assumption that we do our work in partnership with others. To expand who sees themselves as able to effect social change through finance, we depend on many partners bringing their gifts of wisdom, knowledge, experience, expertise, position, resources, and power. Most of the potential partners are still strangers to us. We use Amplification to catch their attention and help them see a new possibility which they might develop, maybe even in partnership with us.

Power of Invitation
Invitations draw others into the world of using finance for social change. Invitations have the power to expand, strengthen and deepen pathways to participation. Amplification of our insights far and wide to all kinds of people helps them recognize and trust a new way of thinking and prepares them to hear and respond to an invitation to participate when it comes.

How This Activity Leads to Change

Organizations
Social change organizations understand the power of voice. They know the importance of stories. They know the need to shape the narrative. But they don’t see that they have a voice in finance. Our Amplification activities can provide an opening for social change organizations to enter the world of innovative finance. We are more than willing to use the power of our brand to have them be louder.
Governments
Amplification activities build validity with governments. Before they act, decision-makers in government agencies will weigh the risks carefully. They want to see others picking up ideas and making them their own. They want to see ideas referenced and reinforced in the media. In their calculations, this reduces the risk that this is just a hare-brained idea without broad based support.

Investors
Amplification is fundamental to our power within the world of innovative finance. Our brand gives us a layer of ease and credibility in our work with investors, whether asset owners or asset managers. The more we are known, the more everyone associated with Criterion can walk into a room and speak to power with authority. The more established our voice is in the field of innovative finance, the more others can lean on our brand and our voice to be able to extend the reach and power of their voice.

Analyzing and Addressing Power Dynamics
The power dynamics around Amplification often diminish the sheer abundance of signals we could be sending into the world. They make us overthink, and not act. Amplification is an area where we take risks, where we name truths. This is not where we are scheming and maneuvering.

Key Power Dynamics
Criterion works in markets that are not yet formed. We are inviting people into possibilities for action that they had not previously seen as possible. We are positing ideas and insights that we are not yet sure of, that are newly formed, that are not yet regarded as valid. We need to resist the pressure to get the ideas right before we communicate. If we wait, we will silence ourselves.

We are amplifying ideas that explicitly challenge existing norms. What we are building will not benefit those with traditional power. Insights or reframes that challenge cultural norms need to be heard over and over before they can begin to compete with the strength of prevailing ideas. Finance has insanely powerful cultural norms that define what is valued. To break through those norms requires a loud, repetitive voice. Through Amplification we fill public and private airspace with new possibilities.

We also need to test different messages both to disrupt these norms and to determine what resonates. We need to learn from our partners how to couch messages in ways that can be heard. But we should not let those concerns over determine our message. We are bridging different fields of thought and need to be bold rather than too careful.

We are disrupting established voices and validating different signals of authority and influence. Fields need to develop feedback loops that reveal when established authorities, such as finance experts, are reflexively given deference. We will sometimes explicitly use the voices of leaders with authority to call individuals and institutions to address power dynamics. But we also need to disrupt that old power dynamic and amplify the voices of those who do not have traditional authority.

These power dynamics sometimes represent a challenge for our partners. We amplify through partnerships. We need to be aware of when it is best to push or step back from partners who are not willing to take risks to challenge power dynamics. Partners often want to control the message. They are

*Amplification: Broadcast that more is possible*
not willing to take risks with their brand. That’s okay. We find other partners. When messages are being overdefined by partners, step back and ask: Do we want to spend that time? Or is there another way to simply get the message out?

**Approaches to Addressing Power Dynamics**

- Steadily and consistently introduce reframes. Start with where they are and introduce an alternative position. For example, take our slogan, “fix the capital not the company,” and use it to underscore the irrationality of the current market. Reveal norms as such, so that they are not naturalized as an inevitable part of the system. Interrogate how norms operate and listen carefully and critically when cultural norms are restated as sacrosanct truths.

- Pay attention to how experts position their knowledge and how others respond to that performance. Be bold in questioning dominant expertise. Repeat the questions that were not answered or not answered adequately.

- Simply raise the volume. When we overthink what we might say, we stop talking. When you are too nervous to speak and don’t feel ready, remember that Criterion is privileged to be swimming in ideas.

- Dare to take risks with our power. Amplification is one place where we speak before we have thought it all out. As an ally of those on the margins, we can challenge norms with less risk to our standing. We have significant legitimacy. We can risk that to push the envelope. We can use our power to shift the dialogue.

- Amplify the ideas of others who are traditionally not given a platform within the world of finance. Pay attention to power dynamics when sharing the ideas of others and consider how and whether others want their ideas to be shared, in whose voice, and with credit given to whom.

**Connections to Other Areas of Activity**

In Amplification, Learning, and Field Building, the potential audience is broad, while in Design, Teaching, and Influence, the intended audience is quite specific and defined. Amplification broadcasts what is possible with increasing volume to a wide audience without having a specific individual or institution as its target.

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Amplification has its own goals. It is not marketing for the rest of our areas of activity. Amplification activities, however, do contribute significantly to the ease and effectiveness of other areas of activity.

**Field building**

Amplification creates an overall ambiance with the volume of possibilities. That ambiance is a powerful asset as part of Field Building.

Amplification can reinforce an invitation to come inside the field of using finance for social change, to become an active participant rather than external to the process or passive in the process. Amplification can break down boundaries that make people think the field is just for the elite insiders. It is a form of Amplification, when we tell stories out loud -- through whatever medium -- that demystify finance and connect finance to social issues that people care about. Amplification does not have to create community or ensure that people feel invited. Amplification broadcasts the invitation but isn’t the path to creating community.

**Design**

Design and Amplification both foster imagination of what is possible. Design does this by demonstrating how some new thing has been done or can be done. Amplification does it by broadcasting stories about new possibilities, reframing ideas, and shifting whose voices are heard.

Amplification should sit alongside Design, from the earliest conversation where an insight emerges through to demonstration of ideas, and not shuttled to the end of the Design process as part of disseminating the results of the work.

We amplify possibilities, not proof. We need to see the moments of insight and synthesis throughout Design as the core content of Amplification. Holding back thoughts until we work them all out is counterproductive to the purpose of Amplification.

**Learning**

Good Learning partners may also become good Amplification partners, putting out to wider audiences the new things we have discovered together. By Learning together, we often increase our confidence in our messages and reinforce our mutual commitments to be louder. Being loud together may give us discipline to stay loud. Our work with MEDA is a good example of this kind of partnership.

The results of our Learning are also fuel for Amplification, but we don’t want to get stuck in a dissemination mode that leaves the reporting to the end. We need to amplify our Learning moment to moment, not just when we’ve got it all figured out

**Influence**

Effective Amplification makes our Influence more efficient. Because of the reach and volume of Criterion’s voice, we have a starting place for conversation with individuals familiar with our work and our point of view.

Amplification makes it easier for the target audience to see their role or believe in their ability to use finance for social change. It supports other activity to create awareness and understanding when Criterion makes a call to action.

Amplification activities can have the effect of strengthening relationships with key players whom we
are seeking to influence or who actively use their power to influence others. But that is cultivation, not Amplification. As part of the “moves management” or cultivation plan for someone in an Influence campaign, we likely want to keep them informed and give them nuggets of language and insight that they can use to advance our shared goal.

Amplification may be a step in a cultivation process, but cultivation isn’t the goal of Amplification. We need to make sure that specific Influence goals do not cause us to overthink Amplification. Fears about how people will see the possibilities and doubts about whether they will be convinced cause us to hesitate. If we hesitate, then we stay quiet.

Amplification is about noise. The targeted messaging needed in Influence is something very different. Amplification makes it easier for the target audience to see their role or believe in their ability to use finance for social change. It supports other activity to create awareness and understanding when Criterion makes a call to action.

**Teaching**

Many of the stories, examples, and insights that fuel our Amplification can also be used to support Teaching, but the two are not the same. In our approach to Teaching, we get permission from a specific group of people to teach and then invest the time to make sure we’re supporting their capacity along a learning journey. Amplification throws seeds on the ground. Some will take root. We don’t need all of them to. We just need to keep scattering.

**Relevant Practices**

The following illustrate how we translate our values into day-to-day practices that support the implementation of these activities. These practices are relevant to many areas of activity and are not unique to Amplification.

The practices cited here focus on the grace required in Amplification. We try to not overthink, to not expect we have it all worked out before we broadcast more as possible.

**Rely on the currency of insights**

At Criterion, insights about how to disrupt power in finance come primarily from our Design process. They are the glimmer of an idea that can provide deeper understanding into using finance to create social change. For example, early on in our gender-based violence work, we created a portfolio of “insights” that painted a landscape of what is possible. Not proven. Not case studies. Possibilities. Several areas of activity rely on the currency of our insights to be able to spark and deepen an imagination.

**Anticipating three or more outcomes per action**

Criterion is almost always getting several outcomes from an action. We may sometimes have a focused Amplification effort. But Amplification is usually built into the process of doing other things. Giving a speech at a conference is Amplification. We are broadcasting ideas and insights. In that speech we may also be reframing the map of the field, and we might have one zinger that is targeted to influence someone we know is in the crowd. We have combined Amplification with Field Building and Influence and maybe a little Teaching. We are constantly and consciously multi-tasking.
**Sharing responsibility for the “cost of excitement”**

The number of times we have been asked to end a speech or a blog with three simple actions is legion. There is an assumption that if we get someone excited about a new idea that we are also responsible for helping them translate that excitement into action. We are not. We can broadcast an idea, even if we don’t have it all worked out. That can be someone else’s job.

**For Discussion or Reflection**

1. What have you read here that confirms or reinforces ways of working/doing things that you have learned and trust?
2. What have you read here that challenges your assumptions about how things should be done?
3. What in this section touches your heart or deeply held ethical beliefs?
4. What is one thing (and maybe more) that you will have to think about doing differently as part of the Criterion team?
5. What skills or attributes do you have that make you wicked good at these activities?
6. Where do you have questions or reservations about how Criterion approaches this activity?
7. What is a simple first step to practice this area of activity in your daily work?

**A Simple Start**

Set a daily practice for one week of living (or at least working) out loud.

Post each day on LinkedIn or Facebook about a new possibility you see, or an insight you discovered, or just something interesting you heard about what someone was doing that you think is bold.

- What changes for you as this becomes a daily practice?
- How do people respond?
- Does their response change over the course of the week?
Design

_Innovate approaches to using finance to create social change_

**Summary and Definition**

Design is a process of innovation that produces new insights and expands what is seen as possible in using finance to create social change. Design activities focus on how specific processes, structures and analyses in finance could be used to create social change in a context. The Design process may result in a tangible demonstration of the possibility, but it begins with many insights that move over time to demonstration.

Design is an inclusive process of discovery that thrives in a culture of curiosity and innovation at Criterion. Design is not only innovative in its findings and outcomes, but also collaborative in how the work gets done, drawing on the wisdom of our network. Design enables participants to take part in a process that changes who has power and influence in using finance as a tool for social change. The result is a tangible demonstration that shifts the imagination of what is possible.

Design at Criterion pushes against established norms and deconstructs commonly held assumptions. We take things apart, play with the components, and explore how they might fit together differently. This process leads us to see reality in new ways that open new possibilities. We call these transforming moments “reframes.”

This approach to research does not have as its aim determining one right answer, but rather opening unexpected possibilities and providing demonstrations of how they might work. It leaves to others the eventual application and implementation of the insights we discover. This approach un-does the authority of “how it’s always been done.”

The challenge and the beauty of Criterion’s Design process is that we are not setting out to solve a problem but to show how problems could be solved. We are not looking for anything in particular; therefore, many of the things we find are useful. We are looking for insight. Design processes create a journey to discover what more is possible.

It is enough that insights have the power to capture imagination, to show what is possible to an institution or the whole field. Insights are currency in Criterion’s world. Even if they are not designed beyond a phrase or a paragraph that sketches a possibility, they can spark imagination in a conversation, in a teaching tool, in the middle of cultivating a partner.
Insights sit in the center of five elements of our Design process:

- **Invite**: Engage strangers and friends in a discovery process that is often uncomfortable
- **Deconstruct**: Break existing tools, approaches, and models into their component parts
- **Reframe**: Shift what matters by creating a core compelling idea that answers the question: on behalf of what?
- **Model**: Bridge the disparate components and perspectives to enable new possibilities
- **Demonstrate**: Share the resulting design so institutions and individuals make different choices from a broader pool of possibilities

While they are not perfectly linear, there are dependencies between these steps. Without deconstructing the components of a system and stepping outside of the assumptions of the current model, it is hard to find the reframes. Without a reframe, models will largely imitate current approaches or solutions. These steps do not always move in a forward motion; often it is necessary to cycle back. If the reframe isn’t working or resonating, perhaps it becomes important to invite in a distinct set of players and again break apart their assumptions. If something is missing or not working, move to other steps in the process and see what could be done. Did you miss something?

In Design, more than in any other area of activity, we have developed methodologies and frameworks that undergird our process. The core framework is the five strategies for using finance as a tool for social change in TOOLKIT.

1. Channel resources to enterprises or investment opportunities that will contribute to the social change you seek
2. Influence the benchmarks against which the success of the investment is measured and introduce metrics that track the impact of the investment
3. Advocate for introducing new data or eliminating bias in how data is assessed in order to shift how value is assigned in finance

4. Shift the structure and terms of an investment to be able to change who holds what power in the relationship

5. Expand what expertise is trusted in investment decision-making and what processes are seen as valid approaches to making investments

In Design processes, TOOLKIT is useful both for exploring these five strategies and for understanding the logic of finance and the individual elements that are outlined. The cards of TOOLKIT can be a jumping off point to look for how to shift analysis, structures, and process.

Other frameworks, like the framework in Disrupting Fields or the power analysis within our process standards, can be used to break apart the component parts of a system to be able to see how they could be put together in new ways.

**Alignment with Values**

**Grace**

When grace is a fundamental value, we trust that there is a pathway to a better future. Grace frees us to believe that change is possible, and finance can work in new ways. We engage in the work of Design with the confidence that insights will come. Grace gives us courage that fuels our creativity.

In the end, we are always in the process of expanding the sense of what is possible. Therefore, we need to break free of the hold of existing ways of looking at things. But at the same time, we are respectful of the knowledge the world holds. We are not innovating from arrogance or a mindset that we know better, but from a place of grace to see where things are stuck.

**Hospitality**

Hospitality leads us to welcome strangers and partners in our network with the anticipation that they bring special gifts of perspective, expertise, and experience which will enrich us, change how we see, and allow us to imagine new solutions. Design is a collaborative process that depends on the generosity of guests and the capacity of hosts to attend, receive, integrate, synthesize, name fresh insights, and remain open to surprise.

**Power of Invitation**

Invitation is a power that opens a door that allows others to enter our creative Design process. It greatly enhances our power to reframe and reimagine how finance could work even as it empowers old friends in our network and new friends on the margins to play an important role in social change.
How This Activity Leads to Change

Organizations
In the end, our mission is to have social change organizations designing strategies to use finance as a tool for social change. In all the years of seeking to engage organizations, they have said, “you first.” We sought to accompany them in their Design processes, and they wanted us to demonstrate first. Therefore, while we invite social change organizations into Design processes, they are not influenced by the participation in the process as much as they are by the results.

We are more effective when we use insights or demonstrations to build stories that show social change organizations what is possible.

Governments
We invite governments to use their power to implement their own policies. For them to use their power to put their policies into practice, they need the insights that drive the design of new possibilities. We are not, however, outsourced agents of implementation for governments. That is the role of civil society organizations, managing contractors, or development finance institutions. We’re not even the technical assistance that supports them to influence those actors. We engage in just enough implementation to be able to show the systems of actors what is possible.

Investors
Many investors follow well-trodden paths in their gender lens investing approaches. One could even call them ruts. While finance as a sector is remarkably innovative, investment managers have not put significant resources to innovating in their gender lens investing practice. Therefore, our Design work often meets their demand for examples of what doing it differently means.

Analyzing and Addressing Power Dynamics

Key Power Dynamics
Our Design process challenges common assumptions about the role of expertise in research. A certain performance and a set of practices in standard research processes determine what is valid data and what constitutes valid experience. While we often can’t simply ignore the customary, trusted processes, we need to engage in a sustained conversation about power and privilege in the research process. Our purpose is to transform power in relationships, not simply to have our ideas recognized within sites of power.

1. The purpose of the Design process is to expand possibilities. We are not confirming something already known but rather opening possibilities.
2. New innovations and new possibilities are going to be found at the intersection between two fields of knowledge. In our case that usually means between finance and gender theory. Effective innovation at the point of contact requires that leaders can translate between those fields.
3. We work in areas such as theology, gender analysis, and finance, where belief systems are entrenched and people are quite committed to their perspectives.

4. The frames define what is considered possible and act as a powerful constraint.

5. Systems of power have a vested stake in maintaining the exiting frameworks and the assumptions that they use to inform Design.

Design begins with listening to what is going on out in the world, connecting diverse people and ideas, and engaging in conversations on the edge to discover something new. It crosses traditional disciplines. It privileges the voices of outsiders, believing they are the source of new perspectives and insights. It welcomes people into a place of comfort and gives them permission to contribute, even outside of their area of expertise. Distinctive methods of curation allow for diverse ideas to be captured and connected in creative ways. This approach upends traditional sources of authority and promotes innovation.

Design disrupts cultural norms and informs how value is assigned within systems of finance. Operating within those norms allows one to make the business case for investing in women or to claim that gender-based violence is a systemic risk. Analysis of those norms informs a choice to work within them or challenge them.

Experts have the power to name what knowledge matters, what data is legitimate, what complexity is tolerated. Without an intentional effort to validate unorthodox expertise and bridge across disparate knowledge, reliance on experts reinforces privilege.

Structures within fields solidify control by providing coordination, governance, standards, and incentives. The power dynamics at play in the field are informed by how these structures operate and who operates them.

**Approaches to Addressing Power Dynamics**

- Spur the development of structures and business models with incentives that disrupt patterns of privilege rather than reinforce them.
- Assert, consistently and clearly, evidence about the bias in how the existing data about marginalized experiences are assessed. Model alternative approaches to incorporating such data into the Design of financial vehicles and instruments and the analysis that drives their implementation.
- Model inclusive approaches to landscaping investment potential that honor contextual knowledge and challenge normative assumptions.
- Develop methodologies that jump past the lagging indicators of materiality and imagine trends that incorporate diverse experiences and draw on alternative pictures of the future.
Connections to Other Areas of Activity

Over the last years, we have privileged Design work. We created a line from Design into other activities which has put this activity and the skill associated with it in a central place in the organization. We are working to dismantle some of those assumptions.

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Like Teaching and Influence, Design is focused on a specific individual, organization, or context. Design focuses on financial structures, processes, or analyses and how they can be used to create social change. Design and Amplification both foster imagination. Design does this through developing insights and demonstrations that show what is possible in using finance as a tool for social change. Amplification broadcasts stories, reframes ideas, and shifts whose voices are heard to spark a broader imagination of what is possible.

Amplification

Design is a creative activity that produces insights and reframes, which should be amplified early and often so that they begin to become familiar to a very wide audience. Amplification increases the power of our brand and creates resonance for the new approaches we are proposing. Too often we postpone Amplification until the Design process results in a convincing demonstration. That is an important moment for Amplification, but not the only one.

Field building

Design is necessary for programs where we’ve committed to provide a demonstration of an idea. We engage in a Design process to discover how an idea could become actionable. But sometimes it is not so clear. In our relationship with MEDA, for example, we are working to demonstrate how a fund manager can address power dynamics. Here we need to distinguish between the Design work to demonstrate possible innovations that would address the problem and the Field Building work required to have those innovations shape how the field understands “fixing the capital not the company.”

Learning

We need to foster a broad understanding of the need for collaborative design processes, so that we continue Learning how to Design in a way that addresses the power dynamics.

In the process of designing a new financial instrument, we should consider knowledge about current
measures of success gained from Learning activity. How would those measures of success constrain how the new instrument is designed?

Learning processes can be critical to capturing insights from Design and making sense of them within a broader research agenda.

**Influence**

Influence sometimes requires a demonstration of what is possible. We like to talk about our early-stage insights as the currency. But our audiences often want more. Each wants to see a tangible demonstration before they step into the breach. It is important to keep these expectations in check. We can show what is possible through Design, without the demonstration being fully in place.

And other times Influence is required to move a Design process forward. If we don’t have investors who are willing to use their power, our demonstration processes can stall. For example, in the midst Designing the MH trade finance vehicle, we spent a year engaging with investors to ensure they were willing to step in once the Design was ready.

In the end, the lesson is not to get too caught up in Design without actively engaging those who have capital and power.

**Teaching**

There is a critical overlap in Design and Teaching. Too often, in the development of a Teaching tool, we start with an outline the “tool” we want to build and then go back and do the research and Design work needed to fill in the tool. This creates a challenge for us, because the results of the Design process are often not well documented, particularly the early insights.

**Relevant Practices**

The following illustrate how we translate our values into day-to-day practices that support the implementation of these activities. These practices are relevant to many areas of activity and are not unique to Design.

**Wandering around Looking for Nothing in Particular**

We don’t always know what we are looking for. In fact, we rarely know exactly what we are looking for. If we did, then it would already be found. For a humorous explanation of this conundrum, a short clip from a movie, the Zero Effect, starring Bill Pullman “Now, a few words on looking for things...” by Daryl Zero - YouTube

What do you do if you are not looking for anything in particular? How do you look? The primary element is a culture of curiosity.

1. Learn in each conversation.
2. Stay open to ideas, even if they do not solve the task directly in front of you.
3. Read about what is going on.
4. Read and search outside of our normal pathway. If we listen only to the feeds that we are getting, then we will only have our own perspective reinforced.

5. Create space in every conversation for surprising ideas to emerge.

6. Listen carefully to the perspective of others to inform reframes. What are the categories in which they operate?

7. Devise good questions that keep this curiosity moving.

8. Listen for connections and then name them out loud to see how others see them. Take the risk to say them before you are sure.

9. Listen for frameworks and assumptions with an empathic but somewhat distant perspective. Isn’t it interesting that they think that? I wonder how that assumption serves them? What power dynamics would be disrupted if they saw things in an alternative way?

10. Listen for patterns. Hear what is coming up repeatedly.

**Breaking into Component Pieces**

When problems seem too big to fix or systems seem too entrenched to change, Criterion’s distinctive approach is to break them into their component parts. We draw on the tools of process mapping to break complex things into individual steps or parts, so that we and our partners can manage them at smaller unit level and determine where the leverage points for change may be.

We tend to break things into components rather than create maps. Creating maps is an exercise of power to show “how things are” or “how things work.” We break systems into components so that actors can see the elements and imagine that they can bring those elements together in a different way.

**Synthesizing like an Accordion**

Accordions are odd instruments. To make sound, the musician pulls open the instrument and then pushes it closed. Our Design processes are similar. We will name that we need to “pull out the accordion as far as we can.” This means to stretch our thinking to include as much as possible. Then we synthesize the ideas as we “close the accordion.” And then it repeats. We open the range of ideas as far as we can tolerate, to see what else can be included, what is at the boundaries. We jump past the boundaries to look in different fields, mixing and matching things we are not sure belong together. This is a messy process. We push the process even further, beyond where we think we can tolerate the mess. We make sure the accordion has enough air. Then we close the accordion again. We synthesize the ideas, assign names, build frameworks, package insights.

It repeats over and over, until we land on the insights or models that invite a broader imagination of what is possible.
For Discussion or Reflection

1. What have you read here that confirms or reinforces ways of working/doing things that you have learned and trust?
2. What have you read here that challenges your assumptions about how things should be done?
3. What in this section touches your heart or deeply held ethical beliefs?
4. What is one thing (and maybe more) that you will have to think about doing differently as part of the Criterion team?
5. What skills or attributes do you have that make you wicked good at these activities?
6. Where do you have questions or reservations about how Criterion approaches this activity?
7. What is a simple first step to practice this area of activity in your daily work?
A Simple Start

One way to practice analyzing power dynamics in finance is to start with diagrams that depict capital structures. Arrows indicate power and control exercised by different actors in the structure in relation to one another.

Search the internet using the word “capital map” and any other type of finance. For example, trade finance. Then click on images, and many diagrams will show up. Below is a screen shot of a sample search.

Choose one or a few diagrams. Where is power illustrated within the graphic? How do the arrows define control? What are the boundaries of the illustration: who is included, who is not?

You want to focus on three things:

• Analysis: how value is assigned. Illustrations often depict what and who determines value in the investment
• Structure: how power is managed in relationships. While the specific terms may not be named, the maps often show how capital flows through intermediaries.
• Process: what is valid, who is expert. A process map names the function of different actors. What assumptions underpin those functions?

It’s just a random map, so you won’t know context or much background. That’s not the point. Just practice looking at a diagram and asking questions about power. Seeing power in existing systems is an important step in designing what will disrupt power.
Field Building

*Shape a field of actors, activity, or ideas*

**Summary and Definition**

Field Building frames the goals of the field and shapes how the collective thinks, acts, comes together. These activities create coherence or reframe understanding of the what, the who and the why behind the field. Our leadership in building fields creates coherence necessary for a set of actors to see themselves as part of a whole and to use the momentum and power of that whole to push toward systems change.

The State of the Field report in 2015 stated that fields could be understood in three ways:

- as a set of ideas organized into common language and frameworks,
- as a set of activities, including the supply of and demand for measurement of investment opportunities, and
- as a loosely organized set of people and institutions.

We often call out the difference between building the field and being the field. There are many organizations, investors or governments who wish there was a field in which they could participate. They have critiques of what is missing. Entrepreneurs want there to be channels of capital that meet their needs. Organizational leaders want to see more clearly what others are working on. These are requests for Field Building.

How fields develop is political. There is power in defining the boundaries, setting the standards, or mapping the participants in a field. These boundaries inform who is seen and who sees themselves as in or out. Our Field Building activities focus on these power dynamics. We engage the tactics of Field Building to shift power in the field.

Key activities within this area of activity include convening people and organizations so that they see themselves as part of a whole. In Field Building we bring people together: we connect actors to one another; we convene to shape collective identities; we show how their work is part of a whole. After experiencing Convergence, one participant said she finally found a home. This home wasn’t just about the practices but the nature of the conversation that was happening.

Field Building is also about ideas. In Field Building we seek to create coherence or to disrupt categories. We frame and reframe ideas. We draw and redraw maps. Fields create discursive frameworks, where certain terminology, catch phrases, buzz words, slogans, etc. come to dominate and frame the discussion. We generate the reframes that then shape ideas as they are adopted by the field more broadly.

Ever since we named the field of gender lens investing, we have been giving away the power to develop the field. We did not want to create an empire where all roads would lead to Criterion. Rather, we named over and over in Convergence and other settings that we were all the field, and we were all responsible...
for working to create the field. We build fields with other field-builders. When we are doing Field Building work, we need to be actively inviting others to do the work with us and to actively own the field.

**Historical Reflection**

Earlier in our history, Criterion was known primarily for our role in convening the field. At a Convergence, in 2016, one of our core partners pulled me aside and suggested that we may be overly focused on Criterion’s work and point of view in the gathering. She was right. As a Field Building event Convergence isn’t about our work; it is about showing the connections in the field.

We have a point of view.

That moment and others like it led us to step back from being a field-building organization. We stopped hosting Convergence for five years. We became more selective in the funding we took to support “landscape” analyses where we could not have a point of view. Other organizations, like Gender Smart, 2X and the GIIN, stepped into those roles in the field of gender lens investing.

Organizations who primarily focus on Field Building activities position themselves in service to the field. They don’t struggle to define a distinct point of view, but rather represent the breadth of the views in the field. Criterion is not in service to the field of gender lens investing.

Field Building activities are still part of what advances our mission. Just part, not the point.

**Alignment with Values**

**Grace**

Field Building is rooted in the confidence that there is a pathway to a better future and that we can be partners in creating it. It is audacious to challenge the assumptions of existing fields and imagine new and better ones. Such courage and boldness come from a fundamental sense that greater goodness is possible beyond what we can see in the moment. We call that grace.

**Hospitality**

Field building is a shared activity. It depends on many partners and potential partners joining an extended conversation, bringing their varied voices, perspectives, expertise, and wisdom. Radical hospitality leads us to welcome strangers with the anticipation that they bring special gifts and that we will be changed by a genuine encounter with them. True hospitality creates a necessary condition for Field Building to happen well.

**Power of Invitation**

A field is a set of shared relationships, ideas, and activities. Relationships begin with invitation and invitations have the power to expand, strengthen, and deepen pathways to participation. While Field Building includes setting boundaries, its first impulse is to reach out and draw others in. That is the power of invitation.
How This Activity Leads to Change

Our leadership in building fields creates the coherence necessary for a set of actors to see themselves as part of a whole and to use the momentum and power behind that whole to push toward systems change that we are seeking.

Investors

Investors see and measure the value of fields as fields of activity. They research and map how capital moves, how much capital moves, and how capital markets facilitate this activity. They are largely blind to the ideas and the social norms that shape how legitimacy is defined in and by a field. Criterion’s Field Building work either directly challenges the power dynamics in this framing or steps around them to invite investors into a different field of actors.

For investors to take actions that disrupt systems of power, they need to see the dynamics in how money moves, be able to name and challenge norms in capital markets and see how they can take these actions in concert with others. For example, we invite investors to see and experience a field of innovative finance that celebrates the expertise of people able to analyze context in intersectional ways.

Organizations

The field of gender lens investing and other fields in innovative finance have been created by and for people who work in finance. Social change actors do not see themselves as part of the field. Our Field Building work invites social change organizations to see themselves a part of innovative finance.

Social change organizations have their own fields. They are quite accustomed to communities of practice, collective action, and Field Building work overall. Foundations invest in fields because they realize they are investing in building the communities of practice, shaping the fields. Our Field Building work shapes the fields of social change.

While it is not necessarily the most accessible or tangible part of social change, organizations operate in and through fields. To many of the organizations we partner with, the activities of Field Building are understood and trusted as an approach to systems level change.

Governments

Governments are aware of their own limitations. Their ability to act is limited. They require private sector investors and civil society organizations to be able to implement. They can pass policies but are limited if the world is unable to implement them. Therefore, our friends in governments see the need for Field Building. Our funding from Global Affairs Canada is a direct result of their awareness that without a viable field of gender lens investing, they will not be able to implement their innovative finance programming aligned with their feminist international assistance policy. While governments struggle to fund and support Field Building activity because the outcomes are not tangible enough, they rely on Field Building to be able to advance their intent to act. They need to point to a field of activity, ideas, or organizations to demonstrate that there is a movement behind ideas.

In addition, conferences, joint actions, and collaborative challenges are familiar means of government action. They might do this kind of Field Building activity with more pomp and circumstance (thereby challenging power dynamics) than we would. We challenge the power dynamics in those contexts,
and they challenge our ability to manage those contexts. Our good friends in governments can help us navigate the political economy of those events. And, in turn, we can invite them into other, surprising, delightful Field Building activities, like Convergence, that give them hope.

Analyzing and Addressing Power Dynamics

“If leaders do not address the power dynamics in the process of how fields are built, in how norms are challenged, in how structures are designed, in how leaders position themselves, then the innovations in finance will not create the equitable outcomes sought.” Disrupting Fields. P. 4

Analyzing Power Dynamics

Within our Disrupting Fields paper, we analyze, in detail, the power dynamics in Field Building. Below is the core framework from that paper, which applies to our work, daily.

Cultural Norms Determining Value

Cultural norms are often hard to name because they are assumed to reflect what is and what should be; that is, what is the status quo. However, norms are constructed within a specific cultural context and therefore operate within social inequities and reflect or reinforce deep biases and privileges. The work of Field Building is the work of understanding and producing new cultural norms. Analyzing power dynamics helps us choose our battles: when to challenge norms and when to work within the system.

Leaders Signaling Authority

In emerging fields, the leadership of the field does not hold the authority that it does in established fields. Those who hold authority within the prevailing system can be invited to use their power to influence the perception of the new field and ascribe it legitimacy. Gender lens investing relied on high profile advocates to lend their names and sought out early adopters within finance who could provide the necessary validation. As we analyze the power dynamics, however, it is important to ask whether the borrowed authority is constraining the aspirations of the new field.

Experts Naming what Knowledge Matters

In merging of disparate fields like finance and feminist theory to create the new field of gender lens investing, power issues arise about how expertise is perceived and what knowledge is seen as neutral, relevant, or material. There is bias toward valuing financial expertise more highly, resulting in a power differential that must be acknowledged and addressed.

Connections Defining Inclusion

As fields organize new alignments of individuals and institutions, they also create new boundaries. Mapping who is in or out of the new field is part of creating definitions of the field. As it matures, the field draws clearer and clearer lines to mark its boundaries. Throughout the development of the field, choices and practices evolve that both helpfully define the scope of the field and actively exclude potential partners. We must keep asking what purposes the boundaries serve and where we need to expand participation and actively build trust with a broader set of communities. This compels us to keep looking out and inviting in.
Structures Solidifying Control

For long term durability and strength, fields build platforms and structures and embed functions into established institutions. To facilitate new patterns of moving capital, intermediaries are formed to fill gaps and bridge between people, ideas, and capital. This activity all needs to be funded through business models that support the Field Building role. As we build a new field, we need to keep asking how the structures of the field centralize power and where checks are needed to redress power dynamics that could calcify into structural inequities.

Resources Reinforcing Privilege

In any power analysis, access to resources factors into what knowledge is privileged, who governs the structures, and who sits at the table.

- Whose and what activities or theories of change are deemed legitimate?
- How does privilege play a role in these dynamics?

The ability to attract volunteer time also informs who has the privilege to step out and lead. Field-building activities are not easily funded, because it is about the connection between things, the ecosystem, and not about the activity itself. We need to keep analyzing the patterns of how funding flows to Field Building activities.

Approaches to Addressing Power Dynamics

- Notice where the volume of capital is assumed to be the measure of change. Is there an alternative approach to gain legitimacy? Are there allies who can voice the norms with less risk to their standing?
- Reveal norms as such, so that they are not naturalized as part of the system. Interrogate how norms operate in field building and listen carefully and critically to the restatements of cultural norms as sacrosanct truths.
- Pay attention to how experts position their knowledge and how others respond to that performance. Be bold in questioning dominant expertise. Repeat the questions that were not answered or not answered adequately.
- Learn to read maps carefully. Read landscape reports in gender lens investing and other fields for where bias or privilege have shaped the results.
- Say yes to invitations, but then use the power at the table to shift the dialogue. Question assumptions and practices of existing networks. Attend, sponsor, speak at conferences that are intentionally building trust across boundaries. If they are not, step in and shift the conversation.
- Fund the ability to stand in the face of power. Provide “air cover” for field building activities explicitly challenging norms.
- Be the first to challenge power dynamics in a context is an essential kind of leadership and models for others that speaking truth to power is possible. (This is Field Building because the person who challenges power dynamics is modeling for others to take a similar action, not a move to influence a specific organization.)
Connections to Other Areas of Activity

In Field Building, Learning, and Amplification, our target is not the individual or the institution but the field of actors, activity, or ideas. Through Field Building, we highlight the collective nature of the work and create experiences where individuals see themselves as part of a community with a shared purpose. Field-building shifts the norm and collective purpose within an audience and cultivates a collective will to act.

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Amplification

Field Building and Amplification both depend on communication, but of different kinds for different purposes. In Field Building, communications are focused on the ideas, activities, people, and organizations in the field in order to create common vocabulary, approaches, and connections within the field. In Amplification, communications broadcast a wide variety of new insights, reframes, or demonstrations widely to diverse audiences in order to plant seeds, spark interest, create resonance with new ideas, and ignite imagination about what is possible.

Reframing is an important practice in Field Building, Amplification, and Design, but in different ways. Reframing as an Amplification or Design activity sparks imagination and enables people to see possibilities differently. As a Field Building activity, reframing grounds the norms that shape how legitimacy is defined in and by a field.

Teaching

Some Teaching may be required before potential participants can fully participate in Field Building activities. This is especially true if they are crossing from another field and do not recognize or understand the logic in this field.

Design

While Field Building focuses on the collective, Design is targeted toward a specific financial instrument or sector. The purpose of Design is to demonstrate how finance can be used as a tool for social change. In Field Building, we take those demonstrations and make them relevant to a collective. Possibilities imagined with Design shape the narrative of the field.

Field Building involves developing a map and a set of standards for the field. Design activity creates the specific applications within system of finance that inform these tools for collective action.
Learning

Fields are structures that facilitate Learning. Once a field has been built, we can use the field to learn with others. But Field Building is a separate activity from Learning with others. In the process of mapping the field, we sometimes do sense making (Learning) to shape how the field is understood. Other times we specifically seek to shape how the field learns and therefore how it defines its success.

Influence

When engaged in Influence, one is shaping the actions of individuals and institutions. In Field Building, one is shaping how those individuals and institutions come together as a collective. Field-Building celebrates the activities of the field or collective; Influence targets an institution or individual to take a specific action.

To be able to Influence a specific development finance institution, it might be useful to do more Field Building work with the 2X Collaborative. Shaping the collective experience of the field could make specific blocking and tackling within an institution more effective. On the other hand, being able to do the Field Building work efficiently might require that we have individuals or organizations aligned, and such alignment often results from our exerting Influence. For example, IADB did not join into the 2X commitment as they saw it lowering the standards.

It is important to know if you are doing Field Building or Influence work when inviting to an event. Imagine you are hosting a party for your friends. You invite people with the promise that they will meet other interesting people and that the gathering will help them see themselves as part of a broader community. Imagine the sense of community that is created by a great party. They see the world differently because they have met. That’s a field-building party.

Now imagine, at the end of the party you stood up and asked them all to commit to take an action. You want them to give their money to support Criterion, or to invest in a company, or to commit their organization to a joint effort. Whatever the ask, it lands like a lead balloon. This ask may have undermined the Field Building part of the event. The broader gathering will be seen as a performance to get the ask, not a genuine community. In an Influence event, the ask needs to be explicit in the invitation. It is one of the reasons that hosting events is a risky way to do Influence.

Relevant Practices

The following illustrate how we translate our values into day-to-day practices that support the implementation of these activities. These practices are relevant to many areas of activity and are not unique to Field Building.

The practices in Field Building encourage an openness or responsiveness to other actors in the field.

Generosity in Introductions

Relationships are not owned, but they can and should be shared. Our relationships are one of the key sources of our power as an organization. We have power for the purpose of sharing with others. We make connections frequently and with an abundance of trust. We don’t seek to control or manage the introduction. But we make introductions grounded in generosity, not as a requirement or a fulfillment of an expectation.
Blowing Up and Creating New Taxonomies

Fields organize knowledge. Often our work requires taking apart the taxonomies that make sense of knowledge to be able to build new frameworks that are more inclusive. We must recognize and be attentive to the patterns of how things are categorized.

For example, any effort to map the field of gender lens investing requires an awareness of how the categories can reinforce problematic power dynamics. If the field sees movement of capital as the core leverage point, the measurement systems will respond to track capital moving. If women entrepreneurs are the center of the field, then the taxonomies will be limited to finding women who are or could be entrepreneurs.

What are the taxonomies that need to be created to shift what actions, ideas, people, and organizations count in the field?

Designing the Agenda Based on Who is Attending

This practice is embodied in Convergence, but we incorporate the practice into all our events, particularly Field Building events.

A Criterion event (meeting, conversation, workshop, or design session) is custom designed for the people we expect to be in the room and is adjusted in real time for those who show up. Part of our preparation for any event is to pay attention to the needs of the assumed attendees. What are their interests, background, experience, motivations, burning issues and likely questions? We familiarize ourselves with the data we have about those who have registered. While we generally have content that we are prepared to cover, that content can be approached in different ways and presented at different levels depending on who is there.

Criterion events are not “canned.” We don’t try to find people to fit the event we’ve designed. We design it for them.

For Discussion or Reflection

1. What have you read here that confirms or reinforces ways of working/doing things that you have learned and trust?
2. What have you read here that challenges your assumptions about how things should be done?
3. What in this section touches your heart or deeply held ethical beliefs?
4. What is one thing (and maybe more) that you will have to think about doing differently as part of the Criterion team?
5. What skills or attributes do you have that make you wicked good at these activities?
6. Where do you have questions or reservations about how Criterion approaches this activity?
7. What is a simple first step to practice this area of activity in your daily work?
A Simple Start

Fields are constantly shifting. Name one field you have been part of and break apart how it developed and how it is evolving.

- What is the origin story of that field? What was the field responding to through its development?
- What are the ideological tensions in the field?
- What are the boundaries of the field? How do you know what is inside or outside of the field? Is that definition contested?
- Who are the leaders in the field? Where does their authority come from?

Reflect on the analysis. What does this tell you about how change could happen in the field? What other questions need to be asked to understand the field?
Influence

Encourage individuals or institutions to take specific actions

Summary and Definition

Influence is the process of Criterion inviting institutions and individuals to use their power to advance the field of using finance as a tool for social change.

Ultimately, we depend on powerful individuals and organizations to put our ideas into action and get them out in the world where they can do some good. We are not in the business of operationalizing the new ways of doing finance that we can imagine, design, and demonstrate. We cultivate relations with organizations and individuals who are aligned with our mission, and we partner with those who can implement and scale what we have helped them to see.

Their success at using our ideas increases our credibility and the power of our brand. It also puts pressure on other organizations to think in new ways, to adapt and change. Eventually this moves the field in the direction in which we are moving. Criterion’s Influence on one institution to try something out can lead to wider Influence and have a ripple effect on the field.

Sometimes, we influence directly.

Influence is an activity that results in an individual or institution taking an action we have encouraged them to take. Like much of Criterion’s work, Influence requires relationship. It is a process that includes identification, cultivation, persuasion, invitation, trust-building and follow-through -- usually, but not necessarily, in that order.

We begin by identifying the individuals or institutions we seek to Influence toward a certain end. We become aware of connectors within the field we hope will use their power to Influence others. We stay connected to these potential partners through regular Criterion communications and updates. We invite them to events and consult with them on matters of mutual interest. We make sure they receive publications and new tools that are relevant to their concerns. We read and respond to their reports and publications. We make it a point to connect with them at conferences. As appropriate, we schedule occasional personal notes or phone calls.

And of course, we don’t always know who may turn out to be helpful. So, we stay connected and are always on the lookout for allies.

Cultivation prepares the way, but Influence itself requires an ask, a concrete invitation. We don’t assume the institutions and individuals who are aligned with our mission and value our work know what we need or how they can help. When we are engaged in Influence, we invite our allies to use their power in specific
ways to advance the cause of using finance to effect social change through Criterion or more broadly in the field.

Criterion is not afraid to ask. Nor are we coy or manipulative in the way we ask. We are clear with people up front that we respect their position and power, and we invite them to use it for good in specific ways. We are prepared to make a persuasive case for the distinctive value they bring, the strategic importance of the action we are inviting, the difference they can make. Sometimes an idea is hatched spontaneously during a conversation, and you might say, “You could help us with that;” “We’d like you to talk to so-and-so;” or “It would be great if you could get us on the agenda.” Then it is important to follow up with a more formal written request based on the informal conversation.

Usually, however, when we want an individual or institution to do something, we are intentional about it. We signal to them in advance that we have something important we want to ask of them. We set a time to meet or talk. We offer the invitation and make our case for the importance of the action we are proposing and why we think they are the best ones to do this. We welcome their questions. We might have prepared a written proposal to leave with them. We give them time to think about it. We let them know we will follow up within a certain time frame. And then we follow-up. In that follow-up conversations, we find ways to continue the relationship whether they can accept this invitation or not.

*Sometimes, we ask others to use their influence.*

We regularly ask powerful institutions and individuals to use their Influence and resources in specific ways. We invite them to:

- Name that they have adopted new approaches and processes
- Participate and lend their strategic support to a specific event
- Invest time and intellectual capital in thinking with us about an important issue
- Make public and private endorsements
- Provide strategic introductions
- Give financial support

When they agree -- as they often do -- they enhance our power as an organization, add credibility to our work, and enhance the stature of the field.

When we ask our friends and allies to use their Influence, we should be aware of what we are asking and what might be at stake for them. Saying yes to us might require a person to stick their neck out or challenge accepted norms. It might divert time and energy from other priorities. It might involve using some of their power chips that they are not ready to let go of. It might violate their corporate culture or job security in ways we have no way of knowing. It will usually require some courage and dedicated energy on their part. They may feel that they have to say no to an invitation from us, even though they really believe in what we are trying to do. We all must choose our battles. We remain allies. The invitation itself is powerful, even if it is not accepted.

Influence requires a constant test of readiness. Influence can feel like pushing against a brick wall. In that case, we don’t have the ability to move the wall without blowing it up. We continue to cultivate that relationship and build trust until the timing is right for a specific ask and our ally has the courage to act.

*Influence: Encourage individuals or institutions to take specific actions*
Alignment with Values

**Grace**
Grace is based on a sense of the fundamental goodness in the world that leads us to assume the best of others. So, we look for allies among the powerful, trust that together we can find a path to a better future, and boldly invite them to take actions that will help us all succeed at change.

**Hospitality**
True hospitality transforms power relations so that the host serves more than dominates and the guest contributes as well as receives value. This kind of role reversal happens when we use our Influence to invite powerful individuals and institutions to use their often much greater Influence to advance the cause of empowering those on the margins to participate in social change through finance.

**Power of Invitation**
Invitation is powerful. A simple invitation begins relationships, changes things, makes a difference. Invitation is a power that is available to everyone. It is a form of power that does not coerce but opens doors. As we use our power of invitation, we empower others to invite more people to come in and join us in the cause of using finance for social change.

How This Activity Leads to Change

**Governments**
Governments set up their day-to-day lives expecting someone will try to influence them. Criterion can’t compete with the lobbying firms in the world, nor do we need to. We are invited by actors inside the government to help shape the implementation of their innovative or blended finance program.

The purpose of blended finance is to influence private sector investors. Our government partners are seeking to use the power of their capital to shift investments to be aligned with their policy. We are not seeking to shape their policy, but to support the implementation of innovative finance programs to be aligned with their policy goals. Most often, we are not convincing them that they should do this but helping them imagine that they could.

**Investors**
The core project of impact investing is to influence investors to move their capital aligned with core social impact. Investors in impact investing understand the importance of influencing and are accustomed to activists seeking to influence. There are pathways set up within the various fields innovating in finance, including gender lens investing. Networks of investors like TONIIC seek to shape the behaviors of their investors. A key difference from previous practices is that Criterion is not measuring our success by the volume of capital moved.

In general, we are only working with investors who have some aspiration for impact. We are influencing them to do more, inviting them to use their power to disrupt power dynamics in their investments. Most
of the existing pathways are designed to move capital. Our approach to asking them to use their power is both refreshing and foreign.

Organizations

Advocacy is a known strategy within social change organizations. Their advocacy is focused on influencing governments. We are inviting organizations to use their power to influence systems of finance and practices of investments. This makes sense to them.

We also seek to influence social change organizations. Unlike investors and governments, organizations fundamentally resist the idea of being influenced. They often question the intent behind our Influence. Therefore, influencing organizations comes after other activities have been exhausted.

Analyzing and Addressing Power Dynamics

Key Power Dynamics

Power dynamics are perhaps most obvious in Influence.

When engaged in Influence, we work with people who have substantial power. That means that in this area of activity the power dynamics are explicit. That makes them both entrenched and more transparent. Leaders with power have gatekeepers and other systems to manage access to this power. There are many structures set up around investors to make sure they are not pitched. Since we are not seeking to move capital, these barriers do not hinder our work. Nonetheless, they reflect a broader culture of distrust that is always present.

Membership organizations that organize investors, philanthropist, or governments represent a concentration of individual power. They are membership organization of philanthropists or investors who have come together both to leverage and often to protect their power. Starting with these groups often sets up another layer of gatekeepers.

We actively work with philanthropists to invite them to use their power to disrupt power. Ironically, women with wealth often first need to work on understanding their own power. Networks such as Women Moving Millions are set up to support the voice of these actors. For them to use their influence to disrupt power, they first must see their own influence.

Power is always relative. Many leaders see the barriers and constraints more than they see their ability to act. Our role is to navigate to new possibilities.

Approaches to Addressing Power Dynamics

- Work to map the power in context so that we can navigate the patterns within that political economy. Understanding power dynamics starts with analysis.
- Start with trusted relationships. Influence requires trust and that trust takes time to build.
- Actively and transparently borrow power from others. It is not only about what power we have. We invite them to use their power to disrupt power. We are not doing this work alone, but rather working through allies.
- Start with asset holders who care about equality in intersectional ways and have them demand solutions that begin with how the problem is understood in context.
In Disrupting Fields, the final chapter is written for individuals assessing their willingness to use their power. It names five steps:

1. Practice seeing and analyzing power
2. Assess power in context
3. Discern the will to act
4. Act
5. Create feedback loops

As we assess our own approach to Influence, the same steps apply.

**Connection with Other Activities**

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<tr>
<th>Scope and Scale of Audience</th>
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Like Teaching and Design, Influence is a targeted activity. Influence targets individuals or institutions to use their power to shape or to take specific actions. Influence and Field Building both cultivate a will to act. Field Building motivates a collective action. Influence increases the political will of an organization or the bravery and determination of an individual to use their power to disrupt power dynamics.

**Amplification**

Sometimes Amplification is the desired outcome of Influence. We Influence individuals and institutions to use their power to amplify our ideas, our approaches, and our brand with their audiences.

Amplification also helps prepare the way for Influence by gaining attention and brand recognition from those we want to influence. When potential allies see scattered references to Criterion in publications, social media, podcasts, news reports, etc., they become familiar with the new ideas from Criterion, reassured of our credibility, and emboldened to stick their necks out with us or for us.

**Field building**

Field building and Influence both cultivate the will to act.

Some Field Building events might be more productive if we took time before the event to invite and secure commitments to action from participating individuals and institutions. If people come into the Field Building event already willing to use their Influence and feeling empowered to do so, there is a much greater likelihood that something can really move forward. Otherwise, we might just have a lot of conversation, and then everybody goes away.
A few questions to help us get the most out of follow-through after an event:

- Who do you want to write to about an event after an event? Tell people if you were thinking about them. It is genuine and people like knowing they are in your thoughts. Imagine who would want to be hearing something that is happening. One of our core practices is to focus as much attention on who didn’t attend the event as much as who did.

- What are the artefacts of the event that can be shared? It is great if you have a recording or document immediately available to share. Too often, however, we wait for a processed version of an event, and then the moment is lost. What else can be an artefact of the event?

- What is the personalized way to frame the follow up? It might be a comment about an outstanding performance by someone on their team or a new insight that you know would be of interest to them. Generic forwarding of summaries of events is also good, because it doesn’t require the personalization that often holds up any communication getting out. But it doesn’t necessarily create a connection, a hook for them to go in deeper.

**Design**

In our Design processes, we engage with institutions and individuals who are willing to use their power to disrupt systems of power. We begin engagement in the early stage of insight development so that our partners catch the excitement of the new idea or approach and will be ready and willing later when they are asked to use their Influence to demonstrate the value of the innovation.

**Learning**

Data and insight about systems change, our audiences, and our theory of change that we gain through Learning feed into influence processes. Having a deeper understanding of the individual or institution we are trying to influence will help us make the case that they are the best possible ones to do what we are asking of them. Making new sense of how change happens can help our potential ally see new possibilities and be willing to take risks.

**Teaching**

Teaching activities build the capacity of a specific group of people to see themselves as able to use finance as a tool for social change. Before individuals and institutions can respond to an invitation to act, they must first come to the realization that social change through finance is possible and that they could be part of such a process. Teaching can bring about that realization.

**Relevant Practices**

The following illustrate how we translate our values into day-to-day practices that support the implementation of these activities. These practices are relevant to many areas of activity and are not unique to Influence.
Asking for Open-Ended Things

Advice on networking often encourages people to ask for something specific. Overall, that’s good advice because people like to be helpful and if you give them something specific, they will try to find it for you. The specificity, however, puts us in a silo. Sometimes what we really want is a far-ranging conversation that will open up new possibilities. If you ask to speak to the person in the organization who has expertise on gender, you will be connected to the junior staff person working on a gender project. If you extend an invitation to an intriguing open-ended conversation, you are more likely to attract more senior leaders who see their place as navigating those conversations.

Triage

Triage is a practice at Criterion that allows us to personalize an invitation or outreach at scale. While it is relevant to other areas of activity, when used specifically in Influence, it makes our cultivation more efficient with leaders who are unlikely to respond to broadcast messages. Triage allows us to reach many more of those who respond only to a personal email that recognizes and builds on our relationship with them.

Triage starts with a list of names and one or several invitations. We review the names one at a time and determine what invitations will connect to them, determine how to frame the invitation, and then draft an email that builds on our last interaction with them. We use a set of standard language as the basis for creating a significant volume of emails with key connectors or individuals we’re seeking to influence.

Using an Interview Process to Influence

Interviews are expected to have a formal structure. They follow a pattern of standard questions that do not reveal bias in the interviewer. We use structured interviews to both learn and influence. We typically introduce reframes or illustrative examples to expand what people see as possible before we ask them what they think is viable. Otherwise, we would simply confirm bias or limited imagination in interviews.

For Discussion or Reflection

1. What have you read here that confirms or reinforces ways of working/doing things that you have learned and trust?
2. What have you read here that challenges your assumptions about how things should be done?
3. What in this section touches your heart or deeply held ethical beliefs?
4. What is one thing (and maybe more) that you will have to think about doing differently as part of the Criterion team?
5. What skills or attributes do you have that make you wicked good at these activities?
6. Where do you have questions or reservations about how Criterion approaches this activity?
7. What is a simple first step to practice this area of activity in your daily work?
A Simple Start

The place to start with influence is not to make the ask, but to think through how to cultivate an individual in a path to an ask.

Think of a person and a specific action you would like them to take. The action needs to be worth it. How would you like them to use their power differently than they do now? What do you know about that person’s readiness and motivation to take the action? What are their perceived barriers to taking that action?

Identify 5 cultivation steps that would influence their readiness and willingness to take the action. It could be an invitation to a Teaching event or a tool that could support their capacity. It might be an invitation to a Field Building event where they would connect with peers who had taken similar actions. It might be a conversation with them where you introduce a set of insights from a related Design process.

Whether these cultivation steps take place over 3 months or 2 years, the starting place is to imagine a series of cultivation steps that you anticipate will shift their willingness to use their power.
Conclusion

Criterion’s approach to systems change is both challenging and common sense. Criterion’s approach disrupts many of the ways that we have learned to operate. Sometimes our activities cut through traditional patterns of change to find more inclusive approaches. Sometimes our unique role and the scale of our activities affect how we make choices about implementation.

We seek to be intentional and explicit about our assumptions and way of working -- things that may not even be talked about in some organizations. We are seeking to build a distinctive organization with a strong culture and transparent way of approaching things so that however long folks are here, they can be learning how to disrupt systems of power, particularly our financial systems.

This guidance document is one effort to bring people working together at Criterion on board and give them a sense of how it is that we do the amazing work that we do. We invest in a range of tools that can help deepen understanding and increase the effectiveness of implementing these activities.

• Our approach to evaluation and measurement reinforces these activities, aligning outputs that contribute to outcomes with the six areas of activity.
• We have built our knowledge management system (SharePoint) and our relationship management system (Salesforce) to reinforce these ways of working.
• Our history provides a rich base of case studies where we have learned about each of these areas of activity. We work to document lessons from those case studies.
• Our values inform a set of practices, beyond the samples named in this document, that create patterns and shortcuts in our approach to work
• We have standard processes of events management, publishing, and relationship management that cut across the areas of activity to ensure efficiency

While these additional resources are in constant development, the documentation can be found in the areas of activity site of SharePoint.

We welcome reflections about how to best support the team and our partners in delivering against these areas of activity. And, finally, we invite you to continue learn with us.