



Mapping the Financing Systemic Transformation Ecosystem

Introduction

This Concept Note responds to a call by and to the FEST community for proposals to greatly accelerate the development of the field of Financing Systemic Transformation (FST). The field consists of all those people and activities working to provide systems change and transformation financing at the scale and with the ease of access necessary to respond to today's polycrisis. These Notes can be considered a field "action planning" process to define 3-5 year field development pathways. For more on the field of FST, please [go here](#).

Goals of the Concept Note

To convene a Systemic Investing Summit to advance the field.

1. Project Leads:

Last name: Mayo
First name: Molly
Organization: Meridian Institute

Last name: Waddell
First name: **Steve**
Organization: **Bounce Beyond**

Last name: Balcazar Tellez
First name: Maria
Organization: Maria Balcazar Tellez Consulting

2. This proposal is in support of the FEST activities for:

Current reality analyses to identify and map those in the field, their roles and activities.

3. Describe the activities in 500 words or less, with explanation of how it advances the component.

This is a proposal to identify key actors and their activities in relationship to the field of Financing Systemic Transformation (FST) via mapping and analysis of the field. This work will combine datasets, enhance relationships, and build from work previously done independently, including:

- Refining the definition of the field by Working Group 11 · Development of the architecture (database and taxonomy) to organize ecosystem actors by the Meridian team.



- Data collection by Meridian with key players in the FST arena through active engagement with community partners and conducting desk research.
- Identification of actors in the FST field by Working Group 11 and convening of the actors for collective development, analysis and founding FEST.

From this baseline data and utilizing the Financing Ecosystem Systemic Transformation (FEST) initiative's four definitional characteristics and work by other FEST thought leaders, we will develop an integrated analytic framework that will guide our mapping efforts. This will provide the basis for:

- Webcrawl mapping: Through on-line software, hyperlinks between actors' websites will be analyzed to produce visual representation of their connections and a list of websites that are related to the field.
- Ecosystem and social network mapping: Develop a preliminary map of individual an organization actors in its current state and the relationships among them. Actors will be surveyed to identify their inter-personal and inter-organizational connections, to produce a visual representation of these relationships.
- Value network analysis: Websites, documents and a modest number of interviews will produce a visual analysis of the roles and exchanges in the field.

Through these mapping exercises, we will develop an analysis of the field which will identify key actors, their roles and exchanges, and structures of the field (relationships and ties, both existing and gaps). This will contribute critical information to FEST's field development strategy and provide the foundation for future development of a dynamic/living map to reflect and engage the growing field..

4. Knowledge about the Field by the applicants

Meridian serves as a trusted third party and advisor to a broad network of stakeholders around the globe and brings deep understanding of people, politics, and power to decision-making and systems change. Meridian is experienced in landscape mapping and analysis and has, over the course of the last year, built relationships with key players in the systems-based investment arena.

Over the last three years with Catalyst2030, Bounce Beyond has led Working Group 11's activities. This produced an analysis titled An Investigation into Financing Transformation that developed an initial database of field actors. This has grown over the subsequent two years with at least monthly convening of field practitioners and thought leaders to share information and undertake projects such as an analysis of the state of the field.

5. History of achievements of the applicants

Drawing on 25 years of experience in facilitating collaborate efforts to solve complex challenges and transform systems to enable solutions, Meridian Institute serves as a trusted third party and advisor to a broad network of stakeholders around the globe and brings deep understanding of people, politics, and power to decision-making and systems change. In the finance arena, Meridian facilitated the development of a philanthropic investment strategy for the Forests, People, Climate collaborative and has recently convened leading key partners who are driving the transformation of family private wealth systems for change.



Bounce Beyond draws on over 80 years of change transformational work by its Co-Lead Stewards as consultants, educators, researchers, and through personal leadership. In the finance arena, their experience includes co-leadership with the world's largest community credit union, co-founding what is now Canada's largest socially responsible investment fund, substantial work on US community banking relationships, and leadership of the Global Finance Initiative and Catalyst2030's Working Group on financing transformation.

6. Innovativeness of approach

By partnering and bringing together complementary data and skills, Meridian and Bounce Beyond aim to exemplify deep collaboration in practice and realize the benefits for the FEST community's development. They will create a partnership team with different approaches and backgrounds to provide insights.

The proposal to combine three types of mapping methodologies will bring an innovative trio of lenses to understand the field of FST. This will provide a valuable breadth and depth to guide its development.

7. Applicants' capacity to achieve proposed outcomes

The applicants each have a long track record of success. This is demonstrated by dozens of reports, journal articles, and a history of convening groups to align and advance co-created solutions. With respect to mapping, their expertise is reflected in development of methodologies that integrate mapping and an unparalleled compendium of 17 mapping methodologies compiled to guide selection of the appropriate one(s) for a set task. For example, Meridian developed a map of actors in the food systems space that is actively being used by foundations to support their decision-making.

If needed, the team will supplement their own skills by engaging an individual to support the analyses.

8. How you are responding to the diversity imperative

The team comprises four women and two men. One woman is Latina, the remainder of the project team is white. They reside in the US, Canada, and the UK. One is gay. One is in his 20s, two are above 65 years of age.

9. Are there any ways you plan to engage others in the field?

We will convene a group of 6-10 in the FST field to review the Value Network Analysis to refine and validate the description. We will also take advantage of convenings of FST actors to engage them with the map and collect and refine data.

10. Please provide a tentative budget.

- Integration of current databases and framework definition - \$5,000;
- Webcrawl Analysis - \$2,000;
- Ecosystem Social Network Mapping - \$3,000;
- Value Network Analysis - \$4,500; Final report - \$8,000;
- Overhead (10%) - \$2,500;



Total - \$25,000