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**Staying Together While Learning:
Relational Work & the Construction of
Collective Institutional Agency**

Research Thesis

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Abstract

Due to the complex nature of Grand Challenges (GCs), the literature is consistent that organizations must work collectively to address them (Berrone et al., 2016; Dorado, 2005). However, because these challenges are also uncertain and evaluative, there is often little agreement about what constitutes desirable change, or what path to take to get there. In complex, uncertain, and evaluative contexts (Ferraro et al., 2015), therefore, it may be the case that a plurality of views and lack of consensus about approach are important elements to be maintained rather than minimized. Despite the possible advantages of maintaining a plurality of solutions and views in collective approaches to GCs (Verweij et al., 2006), we still understand very little about how heterogeneous organizations in collectives may work to preserve this multiplicity while simultaneously constructing collective agency.

This qualitative, inductive, and exploratory study draws upon the single case of Catalyst 2030, a large, global network of nearly 3,000 organizational actors addressing the Sustainable Development Goals (SDGs). Through in-depth interviews, participant observation, and archival data, the research aims to understand the ways in which organizational actors experience GCs, in light of persistent, though possibly useful and generative, differences in the ways in which a challenge is perceived and approached. Second, the study aims to understand the expectations and aspirations of organizational actors when they come together to address GCs. Third, the research explores the types of relational practices that emerge amongst organizational actors operating within GCs, and how these practices contribute to the construction of collective agency toward institutional work (Lawrence & Suddaby, 2006).

The findings from the study are three-fold. First, I detail three ‘experience sets’—*fragmentation*, *time precarity*, and *path ambiguity*—that reveal the ways in which organizational actors cognitively and emotionally perceive GCs. I then describe four ‘collaboration frames’—*coordinated action*, *advocacy*, *social learning*, and *meaning-making*—which represent a diverse set of expectations by organizational actors when initiating a collective effort to address GCs. Finally, I explore three forms of relational work that members of Catalyst 2030 perform on an ongoing basis to maintain a balance between reflection and action that sustains the work of collaboration amongst network members. The three areas of relational work I outline are: *legitimizing heterogeneity work*, *wayfinding work* and *brokering work*. I conclude with a discussion on how these findings relate to the literature on collective agency, developing a process model of ‘collective institutional agency’, the facility by which organizational actors construct a “conscious sense of group as agent” (Cerulo 1997) in order to perform institutional work in addressing complex, uncertain and evaluative GCs.

Dedication

This thesis is dedicated to my family

Chris, Harry, & Eva Rayner

who show me every day

that staying together while learning—

through thick and through thin—

is the very best way of overcoming challenges—

both big and small—

and—

certainly just as important if not more so—

to make sure and have fun along the way.

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While I was embarking on this research, I took a five-year detour when I was invited by François Bonnici, then director of the Bertha Centre for Social Innovation at the University of Cape Town, to co-write a book about 'systems change'. We didn't even know what that phrase meant when we started. That project took us on a fantastic journey of learning, with the result that I was able to meet organizations and people who have been a source of continual inspiration to me. These people are too numerous to list here, but I am appreciative every day for this community of changemakers who provide me with the reason I research—to shine a light on work that is already happening, each day, with care and brilliance, to make this world a better place. Thank you, François, for distracting me from my doctoral research

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Plagiarism Declaration

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2. I certify that I have received Ethics approval (if applicable) from the Commerce Ethics Committee.
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1. Introduction

1.1 Background

This research project is the result of my personal experience working within a Grand Challenge—that of HIV/AIDS in Africa—from 2003-2012. This decade was the heyday of the global HIV/AIDS crisis; global attention turned to sub-Saharan Africa as the epicentre of the crisis, supported by unprecedentedly large tranches of funding from international donors. During this period, I volunteered and worked for three organizations: the United States-based fundraising arm of a South African grantmaking foundation; a multinational NGO operating programmes in ten African countries; and a grassroots community-based organization working in Khayelitsha, a township near Cape Town.

Through my experiences, I became intrigued by how these organizations each played relatively small roles in the unfolding drama of the HIV/AIDS pandemic, yet saw themselves connected to the broader movement to combat HIV/AIDS globally. Like the proverbial blind men and the elephant, each organization approached the problem of HIV/AIDS from its programmatic point of view. Indeed, the sustainability of each organization depended on convincing funders and partners that our approaches were unique and catalytic to the overall effort to defeat the pandemic. At the same time, we were conscious that our work was a 'drop in the ocean' compared to the tens of millions of people suffering from the virus and its impacts. We knew, consciously and subconsciously, that we were working in tandem with other organizations on the crisis, and in many cases, we formally worked in collaboration with these organizations. However, the collective effort always felt fuzzy and vague, seemingly stymied by a sense of competition and conflicting approaches.

This fuzziness persisted even when operating at the international level. Despite faith (and sometimes evidence) in support of our programmatic models, from the organizational

vantage point it was very difficult to discern whether we were making progress or not. Even when attending global conferences where leading experts and large-scale funders would chart statistical evidence of progress, our experiences in the field felt otherwise. It was more often than not extremely difficult to reconcile the perceived 'facts on the ground' with global indices of progress. At the same time, organizations were often ideologically aligned to different 'camps,' specifically those which focused on HIV prevention versus treatment, which resulted in conflicting explanations for our sectoral progress. As an employee motivated mostly by a personal conviction that I was 'doing good,' I vacillated between hope and despair.

In 2011, a landmark study (Cohen et al., 2011, known as HPTN 052), was published that made clear that early ARV treatment acted as a preventive measure for HIV transmission. The feeling of excitement was palpable, and for the first time, those of us working in the sector felt that a turning point had been reached. It is no coincidence that my work in the sector came to an end very shortly after this successful episode. 'Treatment as prevention' became the tipping point for the sector, driving funding to integrated programming with a strong preference for governmental treatment programs and away from the roles and programmes in which I had played part. As I reflected on the trajectory of the sector, however, I continued to feel curious yet conflicted about the 'fuzzy feelings' of collective engagement that I experienced while working on this monumental effort. I was plagued by remorse: would we have reached the tipping point more quickly if we had had a greater sense of the collective effort? Would less lives have been lost if we had better aligned our efforts?

We face a unique moment in history where societal will has been mobilized to chart a way forward for some of our most pressing global challenges. Significantly, the Sustainable Development Goals (SDGs) represent an unprecedented agreement on the part of government and civil society to address major social issues. At the same time, for good or ill,

extraordinary consolidation of wealth has produced a wave of philanthropic and 'impact-focused' capital seeking investment projects. Yet, this seemingly happy marriage of global goal alignment and available financial resources is predicated on organizations working collectively to achieve new societal behaviours and arrangements. While we have significant scholarship about collective arrangements, we still have relatively little empirical understanding of why some collective efforts succeed and others fail.

This research study hopes to make a humble contribution to this understanding.

1.2 Research Problem

Notable institutional theorists have called upon organizational scholars to study "institutions that matter" with the express intent to "shed light on deep-rooted, intractable global problems that shape the lives of many millions of people" ((Hampel et al., 2017, pg 561, 580). More broadly, organizational scholars are being called to boldness—to take on large, unresolved problems in the world, known as 'Grand Challenges' (GCs) (Colquitt & George, 2011; Mair et al., 2016). The rationale for studying organizational and inter-organizational approaches to GCs is two-fold: first, the conceptualization of GCs allows for new avenues for theory-building and, second, tackling GCs gives purpose and voice to organizational research (Colquitt & George, 2011; Ferraro et al., 2015; J. M. George, 2014). GCs often refer to issues such as poverty, inequality and climate change, and are defined in the literature as large, complex and unresolved societal problems (Berrone et al., 2016; Ferraro et al., 2015; G. George et al., 2016). The SDGs, adopted by the United Nations member countries in 2016, provide a formidable list of GCs and underscore the practical need for research that contributes to organizational effectiveness in solving such problems.

According to Ferraro et al., (2015) GCs are unique among social problems because of three defining features, namely that they are complex, uncertain and evaluative. The

complexity of GCs refers to the numerous actors, associations and interconnections exhibited by these issues, typically resulting in dynamic and nonlinear behavior. Due in part to this complexity, GCs are also uncertain, such that actors seeking to influence them are largely unable to predict and act upon probable future states. Finally, GCs are evaluative in that there are no 'right or wrong' answers to problems, while also being multi- and interdisciplinary in nature. Due to these features, GCs are extraordinarily difficult to solve—in fact, some would even go so far as to say that they are unsolvable.

Notably, in tackling GCs, the literature is consistent that, due to the complex nature of such challenges, organizations must work collectively (Berrone et al., 2016; Dorado, 2005). G. George et al. (2016, p. 1890) describe that, “Given the multistakeholder, multilevel functioning of global [Grand Challenges], coordination and structural architectures to enable dialogue and mutual understanding become critical.” However, due to the uncertain and evaluative nature of these challenges, there is often little agreement about what constitutes desirable change, or what path to take to get there. Currently, there exists a significant body of literature devoted to understanding how organizations initiate and conduct their work together (Gray, 1985; Gray & Purdy, 2018; Hardy et al., 2005; Lawrence et al., 2002; Selsky & Parker, 2005), yet certain gaps remain. Many of these studies suggest that, in response to complex problems, the creation of collaborative arrangements are necessary to “jumpstart a process of change” and to define “a solution to a problem” (Dorado, 2005, p. 390). Other studies focus on the ways in which “the uncoordinated actions” of multiple organizations “accumulate and converge over time.” (Dorado, 2005, p. 400). While both of these avenues of inter-organizational institutional scholarship are important to understanding how collectives effect institutional change, they also present certain limitations for complex, uncertain and evaluative issues, such as those exemplified by GCs.

For example, in complex, uncertain and evaluative contexts, it may be the case that a

plurality of views and lack of consensus about approach are important elements to be maintained rather than minimized (Verweij et al., 2006). In these contexts, the multiple viewpoints that are brought to bear on an issue are often due to the highly variable contexts in which these issues manifest, and the broad range of constituents who are impacted by the issue. Despite the possible advantages of maintaining a plurality of solutions and approaches in collective approaches to complex problems such as grand challenges, we still understand very little about how collective networks may work to preserve this multiplicity while simultaneously constructing collective agency.

Therefore, this study aims to understand the ways in which organizational actors experience issue-based institutional fields such as GCs, in light of persistent, though possibly useful and generative, differences in the ways in which a challenge is perceived and approached. Furthermore, this study is designed to explore the relational practices that are employed during this process, and how these practices contribute to the collective agency to perform institutional work. These experiences and practices, which include "elusive but discoverable experiential goods" (Nilsson, 2015, p. 371) such as trust, compassion, and mutuality, as well as power dynamics such as competition, domination and subjugation, are often unpredictable at the outset of a collaborative working relationship, and therefore elude such premeditated analyzes. Rather, they are performative, in that they are created by the very act of 'being together' in a GC over sustained periods of time, often in spite of—indeed, perhaps, because of—significant setbacks and failures. By diving deeply into a case study of a collective working to address GCs, this study aims to understand better the ways in which collective agency manifests in complex, uncertain and evaluative contexts.

1.3 Research Purpose

The purpose of the research is three-fold: (1) to more fully understand how issue-based

institutional fields, such as GCs, are experienced by organizational actors, in light of the characteristics of complexity, uncertainty and evaluativity; (2) to understand the expectations and aspirations of organizational actors when they come together to address GCs; and (3) to explore the relational practices that are employed by organizational actors in these collectives to construct collective agency toward institutional change. Ultimately, the study aims to develop a theory of 'collective institutional agency,' with the aim of deepening understanding of how collectives made up of heterogeneous organizations that emerge within issue-based institutional fields derive a sense of common purpose and efficacy in the face of significant societal challenges.

1.4 Research Questions

The study explores three facets of collective organizational responses to GCs. First, the study is focused on the experience of heterogeneous organizational actors operating within a collective which is situated in an issue-based institutional field. While definitions of experience are incomplete and few, they differ from activities that are observed or performed by others to confer legitimacy (Lawrence, 2017; Suchman, 1995) in that they are subjective, private, immediate, and contextual (Rathunde, 2001). Furthermore, they allow for “the possibility for novelty and active meaning making outside the lines, so to speak, of societal expectations” (Rathunde, 2001, p. 138). To-date, institutional work theorists have largely focused on the symbolic legitimacy of institutions, and have struggled to incorporate subjective experience into theory (Lawrence, 2017). Yet, as highlighted by Lawrence (2017, p. 1793) “experiential legitimacy may be an important concept...because it highlights social and moral dynamics that may not be easily observed in terms of people’s behaviors or language.” Nilsson (2015, p. 370) writes that “experience is inherently specific and contextual and institutions are not.” He goes on to quote Selznick (1992, p. 310)): “What

counts is how people experience the everyday life of the institution.” Particularly within GCs, where normative experience is particularly relevant to the legitimacy of new institutional arrangements, it is important that we become aware of the way that organizational actors themselves experience the institutional change process.

Therefore, the first question that this study will attempt to answer is:

- How do heterogeneous organizational actors experience issue-based institutional fields, such as GCs, in light of their characteristics of complexity, uncertainty and evaluativity?

Second, the study aims to understand the expectations and aspirations of organizational actors when they come together to address GCs. It is often assumed that collaboration amongst heterogeneous actors is essential to addressing GCs. However, it is not always clear what organizational actors *expect* when they arrive to collaborative arrangements or what they aspire to achieve through collaborative efforts. It is likely that organizational actors, with different life experiences, sectoral norms and issue-based goals, arrive to collectives with very different expectations about what can be achieved by collaboration.

To explore this set of expectations more fully, the study asks:

- What expectations and aspirations do heterogeneous organizational actors have for collaborative arrangements, and how do these expectations influence their behaviours within collectives?

Third, the study aims to explore the relational dimension of institutional work performed by organizational actors in collectives. Specifically, I will distil the relational practices that contribute to a sense of collective agency in pursuit of purposive institutional change. In the social-symbolic field of study, practice—“the purposeful, reflexive efforts to shape social-

symbolic objects” (Lawrence & Phillips, 2019, p. 30)—is a prominent area of concern. Relational practices are the ways in which actors “learn, reproduce, and extend” (2019, p. 30) the relational qualities that are important and necessary to the programs of action that they envision. Relational practices extend beyond the binary of whether or not a relationship exists; they are the ways in which the social world is experienced and constructed through “dynamic, continuous and processual” relations (Emirbayer, 1997, p. 281).

Therefore, the final two-part question that the study attempts to answer is:

- What types of relational practices emerge amongst heterogeneous organizational actors operating within complex, uncertain and evaluative contexts, such as GCs, and how do these practices contribute to the construction of collective agency?

1.5 Research Context

Given the exploratory nature of the research, this particular topic seemed well-suited to a single case study which would allow for “rich, detailed, interpretive analysis” of “poorly understood phenomena and ill-structured links among actors” (Maguire et al., 2016, p. 660). I aimed to identify a case study which exhibited heterogeneous organizational actors addressing GCs and engaging in constructive collaboration over a period of time. I was specifically looking for three characteristics in the case: (1) heterogeneous organizational actors addressing GCs; (2) relationships that were in various stages of development, including those that were unknown and unacknowledged; and (3) evidence of continuous and constructive engagement over a sustained period of time.

For the case study, I chose Catalyst 2030, a large, global network of organizational actors addressing the Sustainable Development Goals (SDGs), arguably the world’s most ambitious list of GCs. Significantly, Catalyst 2030 had a heterogeneous membership base of organizational actors from a variety of sectors working on multiple SDGs; they were also

engaged in many configurations of relationships in various stages of development; finally, the network had grown impressively over the first two years, showing evidence of constructive engagement over a sustained period of time. Catalyst 2030 was founded in late 2019 and I was able to study the network through two of its most formative years, from late 2021 to late 2023.

1.6 Rationale & Significance

This study situates itself within the conversation of ‘social-symbolic work’ and specifically ‘institutional work,’ a subfield of institutional theory which explores how actors purposively influence institutions. This conversation provides a generative theoretical home for exploring collective agency in response to GCs. Institutional work emerged in 2006 as an effort to restrain the perceived “hypermuscular” (Creed et al., 2010; Lawrence et al., 2009; W. W. Powell & Colyvas, 2008) versions of agency portrayed by institutional entrepreneurship scholars, yet still provide space for explorations of agency and practice in the context of institutional change (Lawrence et al., 2009; Lawrence & Suddaby, 2006).

As noted in a "taking stock" article by Hampel et al., 2017, p. 560, which systematically reviewed 53 peer reviewed articles using an institutional work lens, "largely missing in research to date has been the collaborative work of heterogeneous networks of actors, which may be especially important in institutional work that is concerned with shaping large-scale institutions." Hampel and colleagues recognize that this inattentiveness to collaborative work contributes to a lack of practical understanding of how institutional work research can engage with important questions, such as global health and gender. The article goes on to identify the further gap of understanding how institutional work is used to purposively shape institutions at the societal level, which are acknowledged to be more "complex and distal" (2017, p. 560) than the institutions surrounding fields and organizations.

This conversation has since been expanded to include the broader study of social-

symbolic work, moving beyond institutional work as a stand-alone area of scholarship. In their recent book, *Constructing Organizational Life*, Lawrence & Phillips (2019) outline three types of social-symbolic: self work, organizational work, and institutional work. The scholars open their discussion by describing social-symbolic objects as “discursive, relational, and material elements that constitute a meaningful pattern in a social system” (2019, p. 24). They then describe these three elements as dimensions of social-symbolic work, including the discursive dimension, the relational dimension and the material dimension. By showcasing the relational as a cross-cutting dimension across all three types of social-symbolic work, they highlight the importance of relational work in the broader context of social-symbolic work. However, they note that “the relational dimension is central to our conception of social-symbolic work, and yet research on institutional work tends to leave this dimension implicit or overlooks it entirely” (Lawrence & Phillips, 2019, p. 203). Specifically, these scholars speculate that this oversight is largely because of the lack of empirical studies of groups of heterogeneous actors working in collaborative rather than conflictual arrangements.

This study aims to partially fill these gaps, by exploring the experiences and relational practices of a collective of heterogeneous organizational actors in an issue-based institutional field that has arisen in response to GCs. Specifically, this study undertakes to understand how issue-based institutional fields are experienced by heterogeneous organizational actors who are undertaking institutional work in pursuit of large-scale societal change. By exploring the experience of an institutional field, the study hopes to contribute to understanding how heterogeneous actors can, despite differing views on problems and potential approaches, develop a sense of collective efficacy and purpose. Ultimately, this study aims to provide a theoretical contribution to the understanding of collaborative work in the purposive shaping of institutions, and a practical contribution to guide organizations working in collective and

collaborative arrangements in response to GCs.

The study also attempts to diverge from the more widely held instrumental approach to institutional work, namely the outcomes-directed activities of actors engaging in activities to shape institutions, to the less explored experiential dimension of institutional work (Lawrence & Suddaby, 2006). Importantly, this study does not try to grapple with the specific outcomes of such work, ie the successful resolution of GCs, but rather the relational practices that emerge through the experiences of working together. This exploration is designed to yield important insights regarding how collectives that arise within issue-based institutional fields may perpetuate sustained engagement by organizational actors, in spite of the plurality of perceptions and approaches that arise in complex, uncertain and evaluative issues such as GCs.

Finally, a relational approach to the research—as outlined more fully in the literature review—will allow for a more multi-faceted understanding of the 'how' of institutional work. Hampel et al., (2017) note that the 'how' of institutional work has been dominated by symbolic strategies employed by institutional practitioners, leaving the relational dimension of institutional work—particularly that related to non-like-minded actors—relatively under-explored. By exploring relational practices, the study aims to show how collective institutional work can be more productively viewed as “dynamic, unfolding relations” between organizational actors (Emirbayer, 1997, p. 281). This approach is not without precedent and was used with thought-provoking results by Lawrence et al., 2002 in their study of “proto-institutions”. This study aims to build upon this approach within a broader network context, gaining a fuller understanding of how experiences of institutions and relational practices of institutional work contribute to a theory of 'collective institutional agency.'

1.7 Definitions & Terminology

The study will adopt the definitions outlined below, in line with the literature described more fully in the following section.

- Agency: "the temporally constructed engagement by actors of different structural environments—the temporal relational contexts of action—which, through the interplay of habit, imagination, and judgment, both reproduces and transforms those structures in interactive response to the problems posed by changing historical situations." (Emirbayer & Mische, 1998)
- Collaboration: "a cooperative, interorganizational relationship that is negotiated in an ongoing communicative process and that relies on neither market nor hierarchical mechanisms of control." (Lawrence et al., 2002)
- Collective: The term ‘collective’ can be used to describe a multitude of groupings. For the purposes of this study, the collective in question will involve a grouping of heterogeneous organizations, operating in relationship with one another, both goal-directed and non-goal directed, that derive a sense of agency within an issue-based institutional field (see below), in particular those which exhibit complexity, uncertainty and evaluativity—such as that of a GC. The closest equivalent in the literature is a “participatory architecture”, which is defined by Ferraro et al., (2015, p. 373) as “a structure and rules of engagement that allow diverse and heterogeneous actors to interact constructively over prolonged timespans.”
- Collective agency: Current discussions embed collective agency within collective identity, so for the purposes of this study, I will start with the following definition: "a [self]conscious sense of group as agent." (Cerulo, 1997, p. 393)
- Distributed agency: A "path" that "cannot be attributed to any one individual actor" and "involves the efforts of a multiplicity of actors." (Garud & Karnoe, 2003, p. 279)
- Experiential good: Elusive but discoverable relational qualities related to "moral well-

being" or "fellowship" that are nurtured in positive institutions. (Nilsson, 2015; Selznick, 1992, p. 32)

- Experiential organizing: "An iterative process through which positive relational and bureaucratic goals of a practice are pursued through symbolically and experientially oriented work." (Thomas et al., 2018, p. 749)

- Institutions: "more or less taken-for-granted repetitive social behavior that is underpinned by normative systems and cognitive understandings that give meaning to social exchange and thus enable self-reproducing social order" (Greenwood et al., 2008, pp. 4–5)

- Institutional work: "the purposive action of individuals and organizations aimed at creating, maintaining and disrupting institutions" (Lawrence & Suddaby, 2006, p. 215)

- Institutional field: "a community of organizations that partakes of a common meaning system and whose participants interact more frequently and fatefully with one another than with actors outside of the field." (W. R. Scott, 2001, p. 56)

- Organizational actor: The definition of an organizational actor in the literature can be problematic. Blau & Scott (2003) argued that modern organizations are able to pursue objectives beyond an aggregate of member interests. Selznick (1984) took this a step further and asserted that organizations could have a "character" imbued with value beyond an instrumental purpose. However, Lawrence & Phillips (2019) note that the conception of the organizational actor as the equivalent to a human actor (King, 2015) is subject to change as the notion of a human actor changes in a postmodern context. For the purposes of this study, the organizational actor is an "authorized agent" (Meyer & Jepperson, 2000) for the interests of a specific organization or set of organizations. Importantly, this actor is still subject to life experiences and embedded in a cultural milieu; therefore, the agency of an organizational actor is not simply as an automaton, tasked with carrying out the "rationality, agency, and character" (Lawrence & Phillips, 2019, p. 124) of a group, but rather an independent human

agent who interprets the interests, values and perspectives of an organization through their own experiential lens.

- Relational dimension (of social-symbolic work): Lawrence & Phillips (2019) expand upon the notions of relational work and relational packages (Zelizer, 2012) to define the relational dimension of social-symbolic work a “efforts to shape relationships among people, including establishing, maintaining, negotiating, transforming, and terminating these relationships.” (Lawrence & Phillips, 2019, p. 33) In a further nuance of earlier descriptions of relational work (Hampel et al., 2017) these two scholars clarify that relational work is not “standalone” but rather integrated with discursive and material dimensions of social-symbolic work. As such, this study will focus on relational practices as a dimension of social-symbolic work that is performed within and beyond collectives in order to purposively change institutions.

2. Literature Review

In the following chapter, I will delve into the literature surrounding several key concepts that are essential to the study. I will start with the literature on GCs, explaining the origins and features of these challenges and how they have become a central focus of management and organizational theory in recent years. I will then describe the literature around institutional change, institutional entrepreneurship, and institutional work, tracing the lineage of the study's theoretical home and explaining the means by which agency came to be reintroduced to institutional theory in a few different guises. Once I have covered this historical account, I will move on to explore the notion of agency more fully, considering not just individual agency, but the less well-defined concepts of distributed agency and collective agency. The review will then move into bounding the unit of analysis for the study—the heterogeneous collective—through a wide-ranging examination of institutional fields, cross-sector partnerships, and various other types of groupings that will help to elucidate the collective that is under scrutiny in the study. I will then briefly describe a rather new area of scholarship—experiential legitimacy and organizing—in order to explain the study's focus on experience as a key piece of the theoretical puzzle of collective agency. Finally, zooming out, I will narrate the sociological turn toward relational approaches, which gives the study its ontological basis, envisioning society constructed by relationships and the agency of collectives as dynamic and processual relations (Emirbayer, 1997; Emirbayer & Mische, 1998) By aggregating these concepts, the literature review will then position the exploration of collective institutional agency as the focus of the study.

2.1 Grand Challenges

This study situates itself within the domain of institutional theory, with the aim of

deepening our understanding of how organizations work collectively to change institutions. Organizational scholars have implored institutional theorists to study "institutions that matter" (Hempel et al., 2017, p. 561) and to tackle the "large and unresolved problems" (2017, p. 580) known as Grand Challenges (GCs) (Colquitt & George, 2011). The concept of GCs has a long lineage, beginning in 1900 with mathematician David Hilbert, popularized by Bill Gates in 2003, and becoming increasingly popular as a term in the organizational literature in the last two decades (Gümüşay et al., 2020; Howard-Grenville, 2021; Seelos et al., 2023). These challenges are institutional in nature in that they often derive from social arrangements that no longer serve the goals of broader society (Battilana et al., 2009) but endure because of cognitive, normative and regulative structures that are in place (W. R. Scott, 2001).

Studying organizational and inter-organizational approaches to GCs can serve two purposes. GCs, as an empirical context, are rich study sites to pursue novel theory-building. At the same time, addressing GCs provides purpose and amplification of organizational research (Colquitt & George, 2011; Ferraro et al., 2015; J. M. George, 2014; Howard-Grenville, 2021). GCs—which include issues such as poverty, inequality and climate change—are unique in that they have three distinguishing features: complexity, uncertainty and evaluativity (Ferraro et al., 2015). The complexity of GCs means that numerous actors are involved, and their associations and interconnections are dynamic and nonlinear. Due to this complexity, GCs are also uncertain, meaning that actors are often unable to predict likely outcomes. Thirdly, GCs present no 'right or wrong' solutions, but are rather evaluative, meaning that different actors have different assessments of how to pursue solving them. Due to these three key features, GCs are extraordinarily difficult to solve—and may, in fact, be unsolvable.

To address GCs, the literature maintains that organizations must work collectively

(Berrone et al., 2016; Dorado, 2005; Gray, 1985; Gray & Purdy, 2018). In fact, this requirement for collective engagement has been enshrined in Goal 17 of the Sustainable Development Goals (SDGs), which G. George et al., (2016, p. 1881) have called “the most universal and widely adopted GCs.” Collective action, however, is difficult due to the uncertain, complex, and evaluative features of GCs (Ferraro et al., 2015). Due to these features, there is often disagreement about goals, outcomes, and processes. While a significant amount of literature covers the important questions of how organizations collaborate (Hardy et al., 2005; Lawrence et al., 2002; Selsky & Parker, 2005), the contexts of GCs prove particularly challenging. In fact, some scholars have even made the case that the mainstream forms of organizing are insufficient to tackle GCs and that novel forms of organizing are required (Ferraro et al., 2015; Kaufmann & Danner-Schröder, 2022; Luo et al., 2016). It is also interesting to note that in these scholarly accounts, collaboration is nearly always displayed in instrumental terms, as a means to address challenges, and rarely as an end in itself.

Due to the nature of GCs, it is likely that many views and a lack of agreement—even outright conflict—about the contours of the challenge and the path forward are, in fact, generative rather than problematic (Furnari, 2014; Mair & Hehenberger, 2014). Multiple viewpoints stem from the many contexts in which GCs arise and the diversity of populations impacted (Gümüşay et al., 2020). Given these advantages, it is important that scholars explore the ways in which practitioners, researchers, and community members can work across disciplines, preserving multiplicity while simultaneously constructing collective agency (Lieberknecht et al., 2023; Schad & Smith, 2018). Within these contexts, research on GCs can potentially generate useful theories about how collaborative arrangements and organizational forms can provide “architectures” for participation across sector disciplines and institutional logics (Callon et al., 2009; Ferraro et al., 2015; West & O’mahony, 2008).

It is important to note that not all scholars agree that GCs are a useful framing for addressing societal issues through management research. Seelos et al. (2023) have recently issued a call to retire the GC term due to its ambiguity and association with other fields (such as mathematics and scientific pursuits). Others have likened the concept to a fad or “frenzy” (Carton et al., 2024, p. 409), or to a “Babel’ization” of terminology (Dorado et al., 2022, p. 1243). Yet, the concept persists as a useful and generative arena in which to study organizations and their contributions to obstinate social phenomena. Recent efforts to clarify the conceptual definitions, ontologies, and obstacles addressed by GC scholarship are welcome (Dorado et al., 2022; Gümüşay et al., 2022), and provide a further foundation to understand organizational approaches and strategies.

Dorado et al., (2022) have provided a useful mapping of the ontological underpinnings of GCs, linking conceptual antecedents of seminal articles to current definitions of GCs in use. Specifically, Dorado and colleagues have identified *tragedy of the commons* (Dietz et al., 2003), *social problems* (Blumer, 1971), *wicked problems* (Rittel & Webber, 1973) and *metaproblems* (Trist, 1983) as conceptualizations of GCs with different ontological foundations. Depending on the conceptual antecedent employed, scholars have identified different obstacles to addressing GCs. These obstacles include (1) curation obstacles; (2) governance obstacles; (3) sensemaking obstacles; and (4) adaptation obstacles. This mapping “brings order to a domain that appeared riddled with fragmentation and a welter of seemingly related yet distinct terms” and showcases in the GC concept the “valuable diversity that contributes to advancing instead of hindering theoretical development.” (Dorado et al., 2022, p. 1266).

As Howard-Grenville (2021, p. 257) highlights, organizational scholarship—and the institutionalists within the field—are uniquely suited to delve into issues of process that relate to GCs, providing an opportunity to “roll up our sleeves and use our expertise with

complexity and multilevel explanations to debate, inform and enable progress on these extraordinarily complex problems.” Institutional theory provides a rich basis from which to understand why social structures exhibit stability and inertia, despite issues and problems arising in these arrangements (Dimaggio & Powell, 1983; Meyer & Rowan, 1977). Furthermore, the study of institutional change gives hopeful accounts of how organizations can agentially influence these social arrangements for the better.

2.2 Institutional Change, Institutional Entrepreneurship & Institutional Work

Since Weber and Marx, institutions have featured prominently in organizational studies. Institutions are “more or less taken-for-granted repetitive social behavior that is underpinned by normative systems and cognitive understandings that give meaning to social exchange and thus enable self-reproducing social order” (Greenwood et al., 2008, pp. 4–5). Institutions informed the work of post-World War II scholars and inspired the birth of ‘new institutionalism’, which expanded the study of institutions beyond the political and economic spheres (Lawrence et al., 2013). Early accounts of institutions emphasized their propensity to stability and stasis, relying on exogenous shocks to explain change (Battilana et al., 2009). More recently, institutional theorists have turned their attention to how institutions are purposively and purposefully changed (Dacin & Scott, 2002; Micelotta et al., 2017; Seo & Creed, 2002). The study of institutional change, while both welcome and relevant, has, according to Micelotta et al. (2017, p. 1886) “been conceptualized in many different ways, leading to a bewildering array of empirical accounts and theoretical claims”.

While early accounts of institutional change focused on the processes and stages of change, in the late 1980s, a new actor burst forth on the institutional change scene: the institutional entrepreneur (Battilana et al., 2009; Dimaggio, 1988). This entrepreneur was a new breed of institutional actor, capable of skillfully changing institutions. One of the

enduring dilemmas in the study of institutional change is how to account for actors who are embedded in the institutional context, yet derive a sense of agency to imagine new institutional arrangements. This dilemma has been dubbed the ‘paradox of embedded agency’ (Battilana & D’Aunno, 2009; Seo & Creed, 2002). While the institutional entrepreneur seemed to defy this paradox, in almost ‘heroic’ ways, the domain of institutional entrepreneurship in many ways freed scholars from the agency-structure debate (detailed further in the next section), allowing for more detailed insights into how institutions can be purposively created and altered (Micelotta et al., 2017).

As accounts of institutional entrepreneurs proliferated, a group of scholars urged caution, taking exception to the depiction of "hypermuscular institutional entrepreneurs" who were somehow able to shift problematic institutions despite their intractability (Lawrence et al., 2009). In line with the increasing focus on 'work' within organizational and management studies, these scholars proposed an alternative view of institutional change: that institutions are socially constructed, and as social beings, institutional actors are continuously engaged in the work of creating and disrupting, but also maintaining, institutions (Hampel et al., 2017). Institutional work constitutes “the broad category of purposive action aimed at creating, maintaining and disrupting institutions” (Lawrence & Suddaby, 2006, p. 216). This 'turn to work' focuses not just technical aspects of work, but also social-symbolic efforts to “shape facets of organizational life” (Lawrence et al., 2013, pg 1024), and has led to the exploration of various forms of work, including boundary work, identity work, and practice work (Phillips & Lawrence, 2012). Institutional work acknowledges the skill and knowledge that actors bring to the construction of institutions, studying the micro-level routines and practices of actors. Institutional work has also been introduced as a way to bring back in the questions of power and justice that have been largely absent from new institutional scholarship (Lawrence & Suddaby, 2006; however, problems exist, see Clegg, 2010 and Alvesson et al.,

2019).

Institutional work provides a unique approach to the paradox of embedded agency: rather than an issue to be solved, it is simply an acknowledged characteristic of social life. "People confront institutions on a day-to-day basis" and they "shape every facet of human existence, providing meaning and motivation to our actions"; in fact, they are "ongoing human accomplishments, constructed and maintained by people's behavior, thoughts and feelings" (Hampel et al., 2017, p. 559). Therefore, for institutional work scholars, to explore agency is not to study a rational actor, like an engineer setting about to construct a bridge, but rather an exploration of the very nature of institutions themselves.

Within institutional work, however, there are still important avenues that are under-explored and phenomena that cannot be fully explained by the literature. While the aim of institutional change scholarship has largely been concerned with change as an outcome, institutional work as a field presents the opportunity to focus on the 'work' of change—the everyday, messy reality of trying to change institutions while being embedded in them. Yet, much of the institutional work inquiry has continued to follow the path of scrutinizing outcomes rather than exploring the day-to-day work itself. Empirical studies have largely been retrospective, utilizing interviews and archival data but limited in their use of ethnographic and observational methods (Lawrence et al., 2013). To deliver on the promise of institutional work, the day-to-day level of scrutiny requires processual methodologies and theories, and presents opportunities to journey alongside institutional workers to observe them as they engage in their work. As Lawrence et al. (2013, p. 1029) write:

The definition of institutional work as purposive action aimed at affecting institutions leaves aside the issue of whether those efforts are successful in shaping institutions, have no effect on them, or have significant but unintended consequences (Lawrence et al., 2009). And yet, studies of institutional work...tend to concentrate on its connection to intended effects, basing their analyzes largely on retrospective accounts embedded in interviews and archival data. Focusing on these questions using these methodological approaches limits our ability to uncover and understand the messy day-to-day practices of institutional work.

These microprocesses have been particularly under-scrutinized within the specific context of heterogeneous collectives. Institutional scholars have acknowledged that collaboration and collective action are key to institutional change (Wijen & Ansari, 2007), and institutional scholars have shed light on the strategies employed by homogeneous collectives, such as professional associations, to pursue institutional change (Micelotta & Washington, 2013; Rainelli Weiss & Huault, 2016). However, significantly less insight has been gleaned about the activities of heterogeneous collectives that pursue institutional work (Hampel et al., 2017). The small subset of scholars that have concentrated on efforts by groups with heterogeneous logics and interests have generally focused on the conditions and strategies (largely discursive or combative) for collective institutional change (Maguire & Hardy, 2009; Zietsma & Lawrence, 2010). These empirical studies have shown how cycles of destabilization and conflict followed by periods of re-stabilization and normalization can lead to new forms of work and configurations of practices that shift widely-held institutional norms and beliefs. Other studies have shown how negotiation strategies and tactics between heterogeneous actors can create “proto-institutions”, but may also fall prey to stagnation (Helfen & Sydow, 2013; Lawrence et al., 2002; Wijen & Ansari, 2007). Finally, nascent work in the field of cross-sector collaboration on intermediary organizations that enable “deliberation and collaboration between diverse stakeholders and different societal sectors” has revealed that particular roles and capabilities are necessary to effect institutional change amidst “ambiguity and conflict” in heterogeneous situations (Hamann & April, 2013, p. 12). However, far less attention has been paid to the specific collaborative and dialogic processes that may support collaborative institutional work among heterogeneous actors. Therefore, the literature fails to explain why actors may embrace or overlook conflict, or stay together in collaborative arrangements in spite of a perceived lack of progress toward addressing grand challenges. As pointed out by Michel, 2020, p. 317: “Previous scholars provide a lens on key

characteristics and conditions of the collaborative dynamic to effect change...Nevertheless, those studies have paid little attention to the complexity of such dynamics from the micro-lens on collaboration.”

This study aims to explore some of these less-investigated areas within the conversation of institutional work—and, more broadly, social-symbolic work (Lawrence & Phillips, 2019)—with the aim of grappling with the concept of collective agency and the experience of working collectively to create, disrupt, and maintain institutions. Specifically, this study identifies a large, emergent, global heterogeneous collective grappling with a broad range of GCs as a rich empirical context to learn more about how organizational actors with diverse viewpoints and backgrounds can pursue institutional work together. Furthermore, by employing a broad range of methodological tools, including participant observation, I hope to bring forward the microprocesses that comprise collective institutional work in the ‘day-to-day’ reality of complex, uncertain and evaluative problems.

2.3 Agency, Distributed Agency & Collective Agency

A robust understanding of agency is critical to understanding how actors create, disrupt, and maintain institutions. For the purpose of this study, the term agency will be used in the sociological sense, to encompass a range of human activities geared toward "purposeful social action and overcoming obstacles" (Lieblich et al., 2008, p. 616). Yet, for such a central concept in social thought, agency has often bypassed serious scrutiny (Emirbayer & Mische, 1998). This sidestepping is not necessarily oversight but rather the legacy of the structure-agency debate that has enlivened yet constrained sociological scholarship for over a century (Berger & Luckmann, 1966; Coleman, 1986; Loyal & Barnes, 2001).

Conceptions of agency are rooted in theories of action, answering the critical questions of how certain actions are pursued over others (I. J. Cohen, 1996; Parsons, 1968). Theories of

action differ based on the emphasis of the constraints imposed by society and the environment, the so-called structure-agency debate, as well as the locus of opportunity development and decision-making. Theories which emphasize structure tend to see opportunities and decision-making for action as largely out of the control of individuals, whereas theories which emphasize agency identify the individual as the primary ‘agent’ of action (Astley & Van De Ven, 1983). Emphasis on one (structure) versus the other (agency) has tended to swing toward one extreme or the other, with scholars working to correct overreach (Hallett & Ventresca, 2006).

Confrontations about the nature—indeed, even the existence—of agency are not limited to sociologists. As noted by Hitlin & Elder, 2007, p. 170), “The term “agency” is quite slippery and is used differently depending on the epistemological roots and goals of scholars who employ it.” Inquiries into the nature of agency provoke questions about self-hood and actor-hood (Meyer & Jepperson, 2000), opening up the door to interdisciplinary debates between psychologists, sociologists and organizational theorists. Similar to the structure-agency debate, these epistemological debates question the ‘free will’ versus ‘determinism’ of the individual (or, more vaguely, the ‘actor’) and highlight individual capacities and structural features that may lead to more or less agency, such as self-efficacy (Gecas, 2003), “self-planned behavior” (Clausen, 1991), “moments of freedom” (Alexander, 1992) and “rules and resources” (Sewell, 1992).

In light of these clashes about agency, contemporary scholars have attempted to resolve, and even harmonize, the two opposing concepts (Alexander, 1992; Hitlin & Elder, 2007). In recent years, organizational scholars have embraced a more amicable relationship between structure and agency. In particular, institutional work scholars, rooted in theories of practice, have drawn upon sociological accounts that emphasize the influence of routine and habit in their conceptions of agency (Bourdieu & Wacquant, 1992; Giddens, 1984; Hampel et al.,

2017). In this vein, agency is often conceptualized in relation to, rather than in contrast with, structure, with structure alternatively constraining and enabling individual agency (Giddens, 1984; Lawrence & Phillips, 2019). This scholarship has been useful in understanding the relationship between structure and agency, opening up the opportunity to explore the actual nature of agentic behaviour in all its many facets.

The challenge to ‘disaggregate’ agency into multiple, interrelated elements was taken up by Emirbayer & Mische, 1998 in their seminal work, “What is Agency?”. Both of these scholars were deeply embedded in the turn to a more relational sociology that took root in New York in the 1990s. Mische (Mische, 2011, p. 88) describes this period of debate and dialogue as “sources of intellectual opposition, energy and excitement”, as senior scholars from several schools engaged in debate about the nature of social relations and shifted their scholarly focuses and methodologies. This time period was ripe for expanding the understanding of agency as a relational process, a concept which allowed Emirbayer & Mische to break open the ‘black box’ of agency and examine its constituent parts with great detail and rigour.

In their paper, Emirbayer & Mische (1998, p. 962) offer a robust definition of agency as a “temporally embedded process of social engagement, informed by the past (in its “iterational” or habitual aspect) but also oriented toward the future (as a “projective” capacity to imagine alternative possibilities) and toward the present (as a “practical-evaluative” capacity to contextualize past habits and future project within the contingencies of the moment)”. This processual definition of agency—with its emphasis on both the flow of time, and the overlapping ways of ordering and orienting towards time—was intended to account for perceived deficiencies in previous definitions of agency, which emphasized one of these three aspects, rather than giving a balanced view of agency. In particular, accounts of institutional change and institutional work have tended to focus on the iterational (past-

oriented) and projective (future-oriented) aspects of agency, with less attention paid to the practical-evaluative (present-oriented) aspect of agency.

Even accounts of agency which have worked with the disaggregated approach have generally assumed that actors are oriented toward a specific temporal aspect of agency, and are thus disposed to certain courses of action (Dorado, 2005); however, while Emirbayer & Mische, 1998 (p. 964) acknowledge that in an “emergent situation” actors may be “primarily oriented toward one or another of these [temporalities]”, it is the interplay of these three orientations—and the recomposition that is required by switching between them—that allows actors to change their relationship to structure. Importantly, this disaggregated approach to agency is philosophically aligned to the school of American Pragmatism, which purports that action is not exclusively in pursuit of predetermined ends, but rather an iterative process of ends-means development that is subject to reflective reevaluation and reconstruction as time unfolds (Emirbayer & Mische, 1998). Accordingly, the definition draws heavily on Mead’s conception of time as a constitution of emergent events, rather than the Newtonian concept of time as a succession of isolated instances (Emirbayer & Mische, 1998; Mead, 1932).

Emirbayer & Mische, 1998 (p. 964) persuasively argue that this definition of agency "makes possible a new perspective upon the age-old problem of free will and determinism." By disaggregating agency into constituent elements that interact with separate structural instances over time, actors have opportunities "to mediate or to transform their own relationship to these contexts." The constituent elements of agency depicted by Emirbayer & Mische (1998) deserve special attention, since they are important to understanding how agency can be broken down for deeper analysis. First, iteration emphasizes the selection of patterns of thought and action from the past that give stability and order to society. Second, projection describes the imaginative element, by which actors conceive of future projects by reconfiguring the received patterns of thought and action, and relating them to their hopes,

fears and desires for the future. Finally, practical-evaluation refers to actors' judgements about possibilities for action within the context of the present, including concurrent demands, challenges and situational analyzes. Together, these three elements form a "chordal triad," operating in varying degrees within any instance of action.

While the work of Emirbayer & Mische (1998) identifies agency as a relational process, it is still focused on individual choices and action, albeit embedded within the social context. Hitlin & Elder, 2007 (p. 173) highlight the insufficiency of this micro focus, remarking that “Discussions of agency to date have not dealt with different levels of analysis, and this leads to much of the confusion surrounding the topic”. Theories of agency have concentrated on the personal, with an interest in why certain individuals exhibit greater agency than others and how this agency is exercised through self-directed action or social positioning (Bandura, 2000; Battilana, 2006; Meyer & Jepperson, 2000). Even the depictions of agency that attempt to harmonize agency and structure—linking the micro to the macro, and vice versa—are insufficient in explaining the ways in which these two aspects of action and change are interrelated. Alexander (1992) vividly describes this conundrum:

Rather than forming a hierarchy, actors and structures are placed horizontally—side-by-side but not interpenetrating and creating new forms. What results is a mixture rather than a solution, a compromise rather than a reformulation. The incantation that “structure controls actors who simultaneously reconstitute structure in turn” is simply that—an incantation. Because action and structure are conceived to be discrete, or empirically distinct, the dichotomization is inscribed in such a way that no amount of juggling—keeping both balls in the air at the same time—can create a fundamentally different conception of the micro-macro link (pg. 1-2)

Depictions of individual agency can result in valorizing or glorifying single actors, at the expense of less clear-cut explanations for success and failure. In the entrepreneurship literature—which, in many ways, could be described as organizational studies' most explicit exploration of agency—entrepreneurs are often conceptualized as ‘heroes’ who have unique traits that allow them to exploit opportunities undetected by mere mortals (Garud & Karnoe,

2003). To counteract this, Garud & Karnoe (2003, p. 277) introduced the concept of 'distributed agency,' suggesting that "entrepreneurship is a larger process that builds upon the efforts of many...drawing upon the generative impulses of actors from multiple domains. Building on Hayek (1945)'s conception of knowledge, the concept of distributed agency involves multiple actors generating momentum that leads to emerging pathways of activity. Once these pathways emerge, actors become alternately enabled and constrained by these pathways as they head down them. This depiction of distributed agency, with its attention to time and iteration, resonates well with the Emirbayer & Mische (1998) definition, and is a useful step toward a conceptualization of collective agency.

However, while the concept of distributed agency is useful for expanding the notion of agency beyond the 'heroic' individual, it does not fully encapsulate the concept of the collective with which this study attempts to engage, nor does it fully explain the phenomenon of collective agency witnessed in collective processes such as the research study. In fact, although the term is certainly used, conceptualizations of collective agency in the sociological literature are frustratingly few. While distributed agency introduces the prospect of a pluralistic approach to agency, it does not refer to questions of alignment among and between actors. Conceptualizations of collective agency are most often implied or embedded in portraits of collective identity, depicted as the action component of identity (Melucci, 1989; Snow, 2001). By combining identity with social movements, Cerulo (1997, p. 393) gives a simple, yet eloquent starting point by describing collective agency as "a conscious sense of group as agent." Yet, given the distinct ways in which collectives are able to arrive at multiple orientations toward time in any given moment, there is no reason to assume that the agentic capacity of collectives is simply a component of a common identity, or even that collective agency mirrors that of individuals. Collectives—made up of multiple organizational actors operating across time and space in myriad combinations

simultaneously—may be able to ‘recompose’ their relationship to structure in ways that individuals are unable to do. Indeed, the capacity of a collective as a distinct sort of actor to engage in the 'chordal triad' depicted by Emirbayer & Mische (1998) has not been explored, to the extent that this literature review can discern. To hone in on the notion of collective agency, therefore, we must first 'zoom out' to understand the nature of the collective, first within the definition of an 'institutional field' and second, within the theoretical domain of organizational heterogeneity.

2.4 Collective Actors, Institutional Fields & Organizational Heterogeneity

Collective actors feature prominently in institutional work (Wijen & Ansari, 2007; Zietsma & Lawrence, 2010). Due to the complexity of institutional arrangements, it is often the case that collective arrangements are required to precipitate institutional change, and in fact, can be the source of ‘proto-institutions’ that can be a source of change in institutional fields (Dorado, 2005; Lawrence et al., 2002). Yet, the conceptualization of what constitutes a collective actor is notably vague. One issue is terminology. Across the institutional work literature, terms which refer to inter-organizational efforts are used interchangeably, such as collaboration, cooperation, convening, movement and partnership (Bertels et al., 2014; Dorado, 2005; Lawrence et al., 2002). Aside from terminology, another issue is the multiple levels at which collectivity occurs, as well as the level of coordination which is present amongst the actors in the collective (Seitanidi & Lindgreen, 2010). A collective can refer to goal-directed groups constituted at multiple levels, referring to arrangements between individuals (organizations, social movement organizations); sub-organizational units (departments, teams); organizations (multiorganizational entities, such as strategic alliances and joint ventures); and even fields (cross-sector partnerships, hybrid organizations). Finally, collectives can also refer to less goal-directed inter-organizational groups, also at multiple

levels, which are operating with a “shared conceptual understanding” and “organized around specific domains of activity” (referred to as 'netdoms' by Mohr & White, 2008, p. 489), or to “countless agents” whose “autonomous actions” converge over time, and who “act as a collective and no single individual can be identified as responsible for the change” (classified as 'partakers' by Dorado, 2005, p. 400), or finally to “organizations in a community setting” which “approximate an ordered coordinated system” (Curtis & Zurcher, 1973, p. 53) yet are not all in formal linkages with one.

This research aims to study collectives comprised of heterogeneous organizations, operating in relationship with one another, both goal-directed and non-goal directed, that derive a sense of agency within an issue-based institutional field, in particular those which exhibit complexity, uncertainty and evaluativity, such as that of GCs. The most important features of this collective are its position in an institutional field and its composition of heterogeneous actors. Therefore, this review will synthesize a few concepts in order to derive a useful definition of the collective which will serve the research questions. These concepts include the definition and characteristics of institutional fields and the nature of heterogeneous organizations.

The definition of an institutional field provides an important starting point for this research's definition of a collective. As noted by Dorado (2005), the importance of the environmental context in organizing processes to address complex problems is rooted in the work of Emery & Trist (1965) and Trist (1983). Scott (2001, p. 56) gave an enduring definition of an institutional field, namely "a community of organizations that partakes of a common meaning system and whose participants interact more frequently and fatefully with one another than with actors outside of the field." (Confusingly, the terms 'organizational field' and 'institutional field' are used interchangeably in the literature—see footnote in Hardy & Maguire, 2010, p. 1366). For the purposes of this literature review, I will take their lead

and refer to an 'institutional field' as the all-encompassing term.) Importantly, Scott's definition of an institutional field identifies the principle of a "common meaning system." In line with the cognitive turn in sociology, institutional fields can be viewed as "cognitions of the minds of participants" (Ibarra et al., 2005). Institutions, and the fields that they inhabit, are mutually constructed through the ongoing actions and "memory traces" (Giddens, 1984) of individuals within institutions (Barley & Tolbert, 1997; Seo & Creed, 2002). In this way, institutional fields become structured through the constitution and re-constitution of three elements: positions, understandings and rules (Battilana, 2006; Hardy & Maguire, 2010; Zilber, 2008).

Fundamental to the conceptualization of institutional fields is the notion of social relationships as the building blocks of fields. French sociologist Pierre Bourdieu explained this emphatically when he wrote that "to think in terms of fields is to think relationally" (Bourdieu & Wacquant, 1992). This line of thinking was foundational to DiMaggio & Powell (1983)'s seminal work which built upon Meyer & Rowan (1977) to establish new institutional theory as a subject of organizational scholarship, emphasizing that organizations would behave isomorphically when belonging to a common field (W. W. Powell & Oberg, 2017). Relationships are guided both by the 'typical' or idealized understanding—composed of norms of behaviour—of what these relationships should be, as well as the experiences of interaction. The relationship between two individuals or organizations exists within a web of other relationships, providing meaning to the way that relationship is understood.

Although institutional fields are constructed through the shared cognition of field members, no one individual or organization participating has a full visual representation of the field or fields in which they are operating. Social relationships exist even without acknowledgement or knowing ((Powell & Oberg (2017) drawing on (Weber, 1978)). Powell & Oberg (2017) give the example of two members of a large organization, joined by a

collegial relationship, who do not know one another and meet for the first time. During this meeting, the relationship that they already share is acknowledged and 'made known' while providing a template for the way they anticipate their relationship to unfold. Similarly, within an institutional field, organizations can exist in relationship without awareness or knowing. An organization may be supported by a common funder or utilizing the services of the same consultant, thereby existing in relationship without awareness, but with important implications nonetheless.

A second important concept undergirding this definition is the expectation and allowance for heterogeneity in the types of organizations that make up the institutional field. This heterogeneity is perhaps of increasing importance, as institutional fields emerge that are less homogenous than previously studied. According to Powell & Oberg (2017, p. 458), fields have begun to emerge that are dominated by issue rather than organization type or occupation:

Early research on [institutional] fields was based on the assumption that fields typically had a dominant type of organization or occupation, along with various supporting organizations...Now, however, in many realms of life, fields are defined by emerging issues, and debates sprawl across a host of domains. Consider environmental sustainability, climate change, or many areas of health care that merge with lifestyle awareness. All these are fields with active participants from a wide spectrum of actors.

As noted in the introductory section, institutional work has typically focused on individual actors or similar actors working collectively. Relatively little institutional work scholarship has broached the heterogenous collective, which frustrates the study and understanding of how institutions are created, changed, and sustained by these sorts of collective actors. Hampel et al. (2017) suggest that research on cross-sector partnerships (CSPs) can offer a jumping off point for understanding heterogeneous collectives engaged in complex issues. Indeed, there is a wealth of scholarship related to how organizations with heterogeneous interests, backgrounds and logics can work together to address social issues (Huxham & Vangen, 1996; Koschmann et al., 2012; E. E. Powell et al., 2017; Selsky &

Parker, 2005) This body of work has largely focused on delineating the types of arrangements and the reasons for which multiple actors coalesce around a series of joint activities. Selsky & Parker (2005, p. 851) outline a four "arena" taxonomy for CSPs, comprised of the players engaged in partnership, including (1) nonprofits and businesses; (2) businesses and governments; (3) governments and nonprofits, and (4) arrangements that include all three types of partners. For each of these types of CSPs, they go on to outline the characteristics involved in the formation, implementation and outcomes of the partnership, including the motivations and challenges that emerge in each of these "stages." However, the authors note that the two research domains within which the study of CSPs have traditionally emerged—namely, strategy and social issues—create limitations for the research. The strategy domain could over-emphasize an instrumental approach, while social issues might over-emphasize collaboration as a key component of decision-making processes. The authors conclude that situating CSPs within their institutional context is an important step toward better understanding how these actors function, and what factors contribute to outcomes.

Another possible path to understanding heterogeneous collectives is through the exploration of “participatory architectures” (PAs) offered by Ferraro et al. (2015) The concept of architectures for participation that transcend organizational boundaries originated in scholarship about the governance of open source software communities (O’Mahony & Ferraro, 2007; West & O’Mahony, 2008) and expanded to include infrastructures for multi-actor collaborations that are self-organizing (Fjeldstad et al., 2012) beyond the technology realm. This understanding of heterogeneous collectives is less instrumentally focused than the CSP literature, emphasizing the self-organizing nature of structures that are formed by actors who choose to engage constructively beyond organizational boundaries, while sharing common resources and establishing productive protocols for governance. Ferraro et al. (2015) use the slightly altered term “participatory architectures”, calling attention to the active

process of participation with which members are engaged. This description of a collective is particularly apt, since it highlights the continuous process of engagement as the unique contribution of such an architecture. They write:

...initial engagement is perhaps not the difficult part – prolonged engagement is...And given the long-term horizon that grand challenges require, participatory architectures must facilitate the engagement of diverse stakeholders in a series of temporally and spatially interconnected events, thereby setting in motion an ongoing process. (Ferraro et al., 2015, p. 374)

Moreover, their definition (“A structure and rules of engagement that allow diverse and heterogeneous actors to interact constructively over prolonged timespans (2015, p. 373)) explicitly includes heterogeneity as a qualifier and defines the architecture by its structural qualities rather than by the objectives of the participants. To clarify further, Ferraro and colleagues (2015) go on to examine the concept of ‘hybrid forums’ (Callon et al., 2009) which are characterized by “distributed authority, lateral accountability, mutual monitoring, and multiple justifications” (Ferraro et al., 2015, p. 374) as examples of PAs. Ultimately, they state that these architectures exist to “forestall disengagement” (2015, p. 374) and expand the network, rather than to reach consensus. Participatory architectures are part of a broader model of “robust action”, including two additional strategies—“multivocality” and “distributed experimentation”—that are complementary in preventing disengagement and increasing “the participation of diverse actors” in order for “the potential for novelty to emerge and more experiments to be carried out” (Ferraro et al., 2015, p. 378).

By combining the concepts outlined above, the collective actor under scrutiny becomes clearer. In this research study, the collective actor is a group of heterogeneous organizations functioning in a multiplex (W. W. Powell & Oberg, 2017) of relationships with one another, operating within an issue-based institutional field and therefore sharing a common meaning system. These organizations may be nonprofits, businesses, or governments, some operating in formal partnership with one another, others in informal, yet acknowledged and known

relationships, while others are in relationships that are unacknowledged and yet-to-be known. Furthermore, the collective actor is notable for its ability to sustain constructive engagement of heterogeneous members over a prolonged period of time, and grow the membership as necessary (Ferraro et al., 2015). As noted by W. W. Powell & Oberg (2017, p. 458) studying these "emerging issue-based fields is challenging, requiring new methodological tools that allow potential participants to be identified on the basis of connectivity rather than ontological properties." Therefore, the next two sections explore how collective actors exhibiting these characteristics might be studied, therefore gaining a better understanding of their sense of agency in the pursuit of institutional work. Specifically, I will delve into two avenues of scholarly research—first, I explore the very recent trajectory of experiential legitimacy and experiential organizing, and the ways in which subjective experience may be incorporated into institutional work; and second, I delve into relational sociology, a direction in sociology that seeks to understand the social world as constructed of dynamic and unfolding relations, rather than static substances.

2.5 The Subjective Experience of Institutional Work

The first area I will explore is a relatively new area of scholarship, which grapples with the conceptualizations of institutional work and agency, specifically through the lens of subjective experience. Although institutional theory aims to understand the structures that constrain and enable actors, it has struggled to fully express the subjective experiences of actors living in those structures (Nilsson, 2015). In the same vein, institutional work, which has acknowledged its interest in the "lived experience of organizational actors" (Lawrence et al., 2009, p. 52), has still largely pursued empirical research that focuses on the symbolic work of institutions (Hampel et al., 2017). Bringing experience into the study allows a more thorough exploration of legitimacy, which Suchman (1995) describes as both the evaluative

and cognitive dimensions of social structuring in institutional theory. By focusing on the evaluative aspect of legitimacy, studying experiential legitimacy requires shifting inquiries from “visible forms of behavior and relationship” to “subjective experiences of behavior and relationship” (Nilsson, 2015, p. 374). Nilsson (2015) provides a concrete example of this shift, considering research showcasing the legitimacy of institutions supporting racial dynamics in firms through the adoption of policies (symbolic), to the ways in which people in these firms experience racial relationships (experiential). In order to understand the cognitive perceptions of institutional fields and the relational qualities which contribute to collective agency, it is essential to bring in the element of ‘lived experience’—understanding the way institutions are experienced by individual and organizations, rather than just how they are symbolically represented—as part of the puzzle.

Nilsson (2015) takes the approach of applying positive organizational scholarship, which has focused on the lived experience of workplace actors, to institutional work scholarship. For the purpose of this study's research, the importance of this approach is the emphasis on bringing together the lived experience and the systems of meaning that constitute institutional structures. Particularly in the context of GCs—but also in other problem domains with which organizational theory concerns itself—the experiential component has importance, because experience contributes to the legitimacy of the institutions which are being created and maintained, as well as the illegitimacy of the institutions being disrupted (Lawrence, 2017; Nilsson, 2015).

For Nilsson (2015) gaps between symbolic and experiential institutional work are not inconsequential, and the two forms can even frustrate one another amidst arguments of primacy, creating a “form trap” (p. 378) when one is held in higher esteem than the other. This is in evidence, for example, when the pressure to conform to certain types of inclusive language and behavior become more important than the inclusive experiences that these

words and acts are meant to instil in a team or organization. Indeed, the representation of institutional agency becomes increasingly complex when experiential legitimacy is added as a crucial layer. Nilsson (2015) goes on to address this complexity by expanding the notion of institutional agency beyond its dialectical basis, to include dialogue and inquiry as a fundamental mode of institutional agency, particularly in the pursuit of a public interest goal such as a GC. Appropriately, this expanded definition of institutional agency mirrors that of Emirbayer & Mische (1998) by incorporating dialogue across time and space as an essential component of agency.

It is worth quoting Nilsson (2015, p. 382, emphasis his) at length to grasp the importance of dialogic inquiry in the construction of agency:

One could argue, in fact, that inquiry is a farther-reaching solution to the problem of embedded agency than existing solutions focused on dialectical contradiction. As (Willmott, 2011, p. 68) points out, contradiction-based solutions essentially “sidestep” the problem by privileging structure. If agency depends on structural conditions like institutional multiplicity, internal contradictions, or an actor’s social position on a boundary, is it really full agency? Where would meaningful intentionality originate in the absence of these conditions? Inquiry, however, does not depend on unintentional, structural encounters with contradiction. It only requires a generalized awareness of cognitive and normative submersion. An actor’s reflexivity begins not with consciousness of specific institutional conditions *but with consciousness of embedded agency itself*. That is, actors start with the awareness that they are not aware of all the different assumptions, values, and beliefs framing their institutional experiences. They catalyze agency not by understanding *how* their experience is institutionally constituted but by recognizing *that* their experience is institutionally constituted. And they express agency less through the development of projects focused on realizing particular institutional arrangements than through attempts to raise institutional conditions and possibilities into fuller consciousness.

Thomas et al. (2018, p. 2) take this exploration a step further by developing a framework for experiential organizing, which they define as “an iterative process through which positive relational and bureaucratic goals of a practice are pursued through symbolically and experientially oriented work.” The purpose of this work is to achieve a “high functioning integration” (2018, p. 5) between the symbolic and the experiential, so that organizations and their members maintain the integrity of both. While this definition of experiential organizing is focused primarily on the meso level—work that is carried on within an organization to

achieve legitimacy at the organizational level—it is interesting to consider how collectives might engage with experiential organizing in the pursuit of institutional creation, maintenance, and disruption.

The study of subjective experience has expanded alongside a growing interest in emotions in organizational studies, especially within the conversation of institutional work (Voronov & Vince, 2012; Voronov & Weber, 2016). The importance of emotions in the study of experiential legitimacy and institutional work is stressed by Nilsson, p. (2015, p. 378) who writes “Emotions, intuitions, beliefs, hopes, and fears are clues to underlying, often subconscious, institutional patterns.” Since experience is in part derived from the emotions that are evoked in an individual’s cognitive representations and “memory traces” (Giddens, 1984), this newer realm of scholarship stresses the importance of studying emotions in order to understand how institutions are both motivated and constituted by actors. As Voronov & Weber (2016, p. 456) write:

Emotions are central to human experience, and scholars have increasingly recognized their role in institutions... emotions are arguably even more foundational to institutions than their motivational power indicates. They are also a way through which people experience institutions as real and personally meaningful and a way they can connect institutions to their sense of self (Creed et al., 2014). In short, emotions are central to the very constitution of people as competent institutional actors who hold a personal stake in an institution...

Delving into subjective experience provides a unique lens to understand the ways in which actors arrive to institutional work, elucidating the ways in which actors become able to ‘see’ institutions—despite their embeddedness—and experience “apprehensions” about “contradictions” ((McCarthy & Moon, 2018) and “breaches” (Herepath & Kitchener, 2016) that ultimately provide the impetus for institutional work. A focus on experience can also surface the “constant shuttling between narrative and action” (Espedal & Carlsen, 2021, p. 780) that provides fodder for institutional work and the agitation that can lead to action. Finally, studies of subjective experience can help to shed light on the process through which

actors create “a shared feeling of meaningfulness” (Lepisto, 2022, p. 1327) which is essential to sustaining engagement in collective work, particularly within GCs.

Based on this literature, this study starts with a first research question that explores how organizational actors experience an issue-based institutional field that is based on GCs. The purpose of this question is to understand the ways in which a network of shared meaning can be built and maintained, despite a plurality of views. The research then continues with its second and third questions to understand how expectations and aspirations of organizational actors contribute to the initiation of collaborative work, and how relational practices are employed within these networks, contributing to a sense of collective agency. The new theory-building around experiential legitimacy and experiential organizing suggests that institutional agency may require a new portrayal in contexts of complexity, uncertainty and evaluativity. As Nilsson (2015, p. 379) writes: “Institutional researchers have almost exclusively portrayed agency as dialectical... Shared experiential goals, however, may not lend themselves to this kind of interest- based contest. Instead, positive institutional agency may be less dialectical than dialogical, rooted not in contest but in inquiry.”

2.6 Relational Sociology, Relational Work, & Social Networks

New institutionalism urged scholarly attention away from individual actors to the study of sectors and fields in order to "think about organizations as collective entities, responding to one another's actions" (W. W. Powell et al., 2017, p. 306). By this account, new institutionalism is, in fact, a study of relationships, built upon Bourdieu's view of society as an assemblage of social relationships (Bourdieu & Wacquant, 1992). Therefore, it is interesting that institutional theory, and institutional work in particular, has often sidelined the study of the relational dimension of institutional work or assumed its implicitness (Hampel et al., 2017; Lawrence & Phillips, 2019). In this section, I will outline the usefulness

that the relational turn in sociology can offer to the study of institutional work, with particular opportunities to study the phenomenon of collective agency. I will then focus on the relational dimension as a critical element of institutional work, expanding upon two definitions of the term 'relational work' and situating the study within the overall realm of social-symbolic work.

Relational sociology draws from the ontological perspective that the social world is constructed of dynamic relationships, rather than isolated substances (Emirbayer, 1997). Germinated in the 1990s in "the New York School" by notable sociologists including Charles Tilly and Harrison White, and nurtured by the growing interest in (and sophistication of) network analysis, relational sociology is credited with "the consolidation of a perspective that crossed a series of fractal divides, linking network relations with discourse, identities, and social interaction" (Mische, 2011, p. 4). While debate still simmers about whether relational sociology truly represents a paradigmatic revolution or merely a turn in sociology, the growing interest in the school and its approaches is no doubt rooted in a critique of the classic 'individualistic-collectivistic' divide (Prandini, 2015). Relational sociology essentially allows both the individual and the collective to act as determinants of social phenomena: "The individual is 'social(ized)', and the social is interiorized by individuals; they are made by the same stuff, 'relationships'" (2015, p. 3).

For the institutional work scholar, therefore, relational sociology offers a useful direction for understanding agency in the context of institutional creation, maintenance and disruption. It is helpful to consider at length Emirbayer (1997, p. 294, emphasis his)'s thoughtful description of how the relational approach has theoretical implications for the study of agency:

Agency is commonly identified with the self-actional notion of "human will," as a property or vital principle that "breathes life" into passive, inert substances (individuals or groups) that otherwise would remain perpetually at rest. By contrast, the relational point of view sees agency as inseparable from the unfolding dynamics of situations, especially from

the problematic features of these situations... Viewed internally, agency involves different ways of experiencing the world, although even here, just as consciousness is always consciousness of something (Husserl, 1960; James, 1976), so too is agency always “agency *toward* something” by means of which actors can enter into relationship with surrounding persons, places, meanings, and events. Viewed externally, it entails concrete transactions within relational contexts (cultural, social structural, and social psychological) in something much like an ongoing conversation. Agency is always a dialogic process by which actors immersed in the *durée* of lived experience engage with others in collectively organized action contexts, temporal as well as spatial.

Broadly, a relational approach views an institutional field as composed of the dynamic and evolving relationships between organizations in a field. Rather than constructing linear or instrumental accounts of field emergence, a relational approach aims to elucidate the patterning of relationships and the way in which actors are engaged in complex, overlapping and reordering networks, which at a broad level constitute the field. It is important to refer back to the definition of institutional fields when considering how these relationships and their interaction patterns are constituted. In the same way that fields are comprised of relationships that are both known and acknowledged, as well as unknown and unacknowledged, concepts and shared meanings can be exchanged in interactions that are "not only channeled through direct contacts, but also occur through the evolution of cultural categories and codes expressed in a common discourse" (Oberg et al., 2017, p. 18). Therefore, relational approaches do not reduce relationships to direct interactions between actors, but rather propose that they are comprised of a number of different "types of ties," a term from network analysis that provides the visual representation of relationships and resulting interactions (Mische, 2011, p. 83), quoting (H. White, 2008)).

The constitution of a tie is, therefore, of significant consequence for relationalists. Relationalists caution against seeing ties or relationships as merely “pipes” for the flow of the passage of information, knowledge and resources (W. W. Powell & Oberg, 2017). One alternative view is to understand relationships as "prisms" that deliver informational cues which grant actors within an institutional field the possibility for reputational differentiation

(Podolny, 2001, p. 35). Yet, W. W. Powell & Oberg (2017) (building upon Padgett & Powell, 2012) urge us to see beyond this perspective, particularly within institutional analysis, and see the potential for relational networks to act as transformational actors. From this perspective, "Neither products nor information are inert sacks of potatoes passing through passive networks-as-pipes. Products are transformed through production rules, and information is transformed through communication protocols. Either way, social networks don't just pass things; they do transformational work." (Padgett & Powell, 2012, p. 19).

This rather technical description is compatible with the more poetic description by White (1992) joined by Mische & White (1998, p. 700) which describe ties as accompanied by "stories, including those normally suppressed or held in abeyance in a given social setting". In this body of work, ties are constructed through narrative, underpinned linguistically, and fluid across time and space as actors move through "publics" (Goffman, 1963) and experience "switchings" where attempts to control identity in "situations" across "network domains" or "netdoms" result in action (Mische, 2011; Mische & White, 1998).

Given this approach to agency, then, it is crucial that institutional work take into account the experiences, expectations, and practices of actors as they enter into relationships with others. However, as noted above, institutional work accounts have often overlooked the relational dimension or relegated it to implicit status. Lawrence & Phillips (2019) have highlighted the lack of inquiry into the relational dimension within institutional work scholarship, and speculated that this is due to relatively few studies of heterogeneous collectives. Recently, scholars have begun to incorporate accounts of the relational dimension into theories of institutional work (Bertels et al., 2014; Empson et al., 2013; Smets & Jarzabkowski, 2013). The exploration of the relational dimension can offer new insights by uncovering "actors' patterns of direct and deliberate engagement with other actors" (Bertels et al., 2014), and, importantly, offer more insights and understanding into why and how diverse

actors engage and sustain collective work, despite its challenges.

Relational work has been defined in several ways, including two which I will outline. Hampel and colleagues (2017, p. 570) define relational work as "building interactions to advance institutional ends". They go on to describe two ways that this work has been studied: inquiry into how actors gain followers for their cause, and exploration of how actors collaborate with like-minded actors in their field. This definition of relational work uses interactions as the primary building block of relationships and highlights an instrumental purpose ('institutional ends') to the work. Both aspects of this definition raise potential problems when studying the collective agency of heterogeneous collectives. First, Emirbayer (1997) cautions against the use of the term interaction when it is aligned with substantialist philosophies that regard interaction as an action between two fixed entities, which is prevalent in variable-based analyzes. Rather, he chooses to use the term "transaction" to describe the way in which "units involved in a transaction derive their meaning, significance and identity from the (changing) functional roles they play within that transaction" (Emirbayer, 1997, p. 287). Second, Hampel et al. (2017)'s definition precludes the possibility that relational work may have purposes beyond or outside of the pursuit of "institutional ends", and the ways that relational work may integrate with other types of activities to shape social-symbolic objects such as institutions (Lawrence & Phillips, 2019).

A second, perhaps more useful, definition of relational work is offered by Zelizer (2012, p. 149): "the creative effort people make establishing, maintaining, negotiating, transforming, and terminating interpersonal relations". Zelizer clarifies that relational work is performed in all facets of life, including religious, political and social realms, however she highlights economic relational work as particularly dramatic since it occurs in an arena of life that is "supposedly impervious to such efforts" (2012, p. 149). Strikingly, in this definition, the instrumental purpose of the work is less consequential than the relations themselves—a

feature which may come closer to describing the actual nature of the relational dimension of institutional work. In a seeming attempt to resolve this conundrum, Lawrence & Phillips (2019, p. 33) stress that relational work is not a “standalone” set of activities, but rather “integrated with the discursive and material dimensions...of social-symbolic work, and thus focused on multidimensional social-symbolic objects rather than relationships *qua* relationships.” While this resolution is perhaps a bit too tidy, it may help to analytically discern which types of relational activities are most interesting for the study.

Given these definitions of relational work and the shifting understanding of relationality within the scholarly field of institutional work—and, very broadly, within sociology—clarity of terminology in the study is key. For the purposes of this review and the study, I will continue to use the term “relational work”, but acknowledge its use within the broader term “relational dimension” used by Lawrence & Phillips (2019). By using this broader term, the relational efforts of organizational actors will be linked to the institutional work which they are furthering. However, with the incorporation of subjective experience as described above, I will also be attuned to relational efforts that transcend these instrumental goals. In this way, I will aim to use terms such as “interactions” in the relational, transactional sense rather than the substantialist approach. Furthermore, I will be conscientious when considering how relational efforts may be integrated within other, larger work packages. While this may complicate the conceptualization of the relational dimension of institutional work, it may provide the more nuanced picture of collective institutional agency that the study requires.

2.7 Toward a Theory of Collective Institutional Agency

This literature review has mined the scholarly literature for concepts that will assist in understanding how heterogeneous organizations derive a sense of common purpose and efficacy in the face of significant societal challenges, or GCs. This study is motivated by

witnessing the phenomenon of collective agency that is built as heterogeneous actors struggle to initiate and sustain their work together in the context of GCs—a phenomenon that is increasingly important to overcoming the world’s most pressing challenges—yet finding inadequate scholarship to explain why and how this work unfolds. As I have shown, the literature is consistent that organizations need to work collectively to tackle GCs (Berrone et al., 2016; Dorado, 2005). G. George et al. (2016, p. 1890) and a vast literature shows how organizations work together to address these important challenges (Hardy et al., 2005; Lawrence et al., 2002; Selsky & Parker, 2005). To fully explore this relationship between GCs and collective action, the review has (2.1) grounded the study in the scholarly domain of GCs; (2.2) located the study within the conversation of institutional work, with its balanced view of agency and structure; (2.3) delved deeply into the sociological literature on agency while exploring the theoretical components that can be used to develop a conceptualization of collective agency; and (2.4) reviewed various approaches to provide direction on identifying a heterogeneous collective actor, identifying issue-based institutional fields as a generative place in which to study organizational heterogeneity.

As this literature reveals, a number of deep-rooted questions persist in our understanding of how collective work in the context of GCs unfolds. Specifically, we understand very little how organizational actors come together and preserve the plurality of views that is crucial to addressing GCs while simultaneously constructing the collective agency that ensures sustained engagement and joint solutions-finding. These questions rely on organizational actors’ commitment to “participatory architectures” (Ferraro et al., 2015) that “require that diverse and heterogeneous actors take seriously the different types of stories that are in circulation” (Ferraro et al., 2015, p. 374; Verweij et al., 2006). The answers to these questions are necessarily encountered in the ways in which organizational actors bring their experiences into the collective domain and subsequently forge relationships through repeated

interactions with each other. Therefore, the review has also identified (2.5) the emerging scholarship of subjective experience and (2.6) the turn toward relational sociology as important contributions to the study, and considered different ways that these areas of scholarly attention may shed light on the experiences, expectations and relational practices of organizational actors within heterogeneous collectives.

By iterating between the literature and potential empirical contexts where heterogeneous organizational actors are tackling GCs, three specific research questions have emerged:

- First, how do heterogeneous organizational actors experience issue-based institutional fields, such as GCs, in light of their characteristics of complexity, uncertainty and evaluativity?
- Second, what expectations and aspirations do heterogeneous organizational actors have for collaborative arrangements, and how do these expectations influence their behaviours within collectives?
- Third, what types of relational practices emerge amongst heterogeneous organizational actors operating within complex, uncertain and evaluative contexts, such as GCs, and how do these practices contribute to the construction of collective agency?

At the heart of these questions is nature of collective agency, which remains under-theorized in the sociological and organizational literature. To open up this ‘black box’ of theoretical understanding, this literature review has provided an elaboration of these concepts with the aim of deriving a term, 'collective institutional agency,' as the specific phenomenon that this study will explore. Note that this term acted as a placeholder throughout the course of the study since the research itself (being inductive in nature) has guided the final

derivation of terminology. Ultimately, the research has developed a process theory which provides further understanding about how heterogeneous actors derive a sense of collective agency to engage in institutional work in the complex, uncertain and evaluative conditions of GCs.

3. Methodology

In this chapter, I will describe the methods that I used to explore the phenomenon of collective institutional agency in the context of GCs. I start by situating the study within its research paradigm and describing the approach and design of the study. I then discuss the selection of the case study and the characteristics that made this case appropriate for the research. Next, I will describe the data collection methods that I used to gather information about the case study over a two-year period, and the analytical approach that I undertook to arrive at my findings. Finally, I will conclude with the ethical considerations that were addressed throughout the study.

3.1 Research Paradigm

Situated in the scholarly field of institutional work, this study adopts a nominalist/subjectivist ontology. The study is rooted in the belief "that social reality is socially constructed, mutable and dependent on as well as embedded in the behavior, thoughts and feelings of people and collective actors" (Hampel et al., 2017). The study also operates within an anti-positivist epistemology, from the point of view that social facts are "ecologically embedded within specific contexts of time and space—that is to say, within particular interactional fields composed of concrete, historically specific "natural areas" and "natural histories"" (Emirbayer & Goodwin, 1994). Finally, as an exploration of agency, the study tends toward a voluntaristic view of human nature (Burrell & Morgan, 1979), with the "assumption that people and collective actors have the potential to act in ways that involve an awareness of their relationship to institutions" (Hampel et al., 2017).

3.2 Research Approach

The study is qualitative, inductive and exploratory in approach. It draws upon a single case study of a large, global network of organizational actors addressing the Sustainable Development Goals (SDGs), the United Nations' formidable list of GCs. This research was particularly well-suited for a qualitative, single case study approach. Qualitative research allows for inquiry into situations that are characterized by novelty and nascent theorization (Eisenhardt, 1989; Marshall & Rossman, 2014; Yin, 2003). In particular, case studies are ideally suited to “rich, detailed, interpretive analysis” of “poorly understood phenomena and ill-structured links among actors” (Maguire et al., 2016, p. 660). In particular, single case studies allow for multiple levels of analysis through an embedded design (Eisenhardt, 1989), which the study of a vast network lends itself toward quite naturally.

Since my aim was to scrutinize the experience and relationships between heterogeneous organizational actors working collaboratively within an issue-based institutional field, it made sense to delve deeply into a collective that was vast but still growing, using all of the qualitative tools at my disposal (interviews, observation, and archival review). It was also important to ensure that the collective in question should be comprised of relationships already formed, as well as those that were unknown and unacknowledged (Oberg et al., 2017). With full access to the case study in question over two years, and a unique role as an observational member of the governance structure of a large collective, I was able to refine my research questions to be theoretically sound and practically useful, to triangulate my findings across multiple sources, and ultimately to theorize how collective agency to perform institutional work—‘collective institutional agency’—develops in the context of complex, uncertain and evaluative GCs.

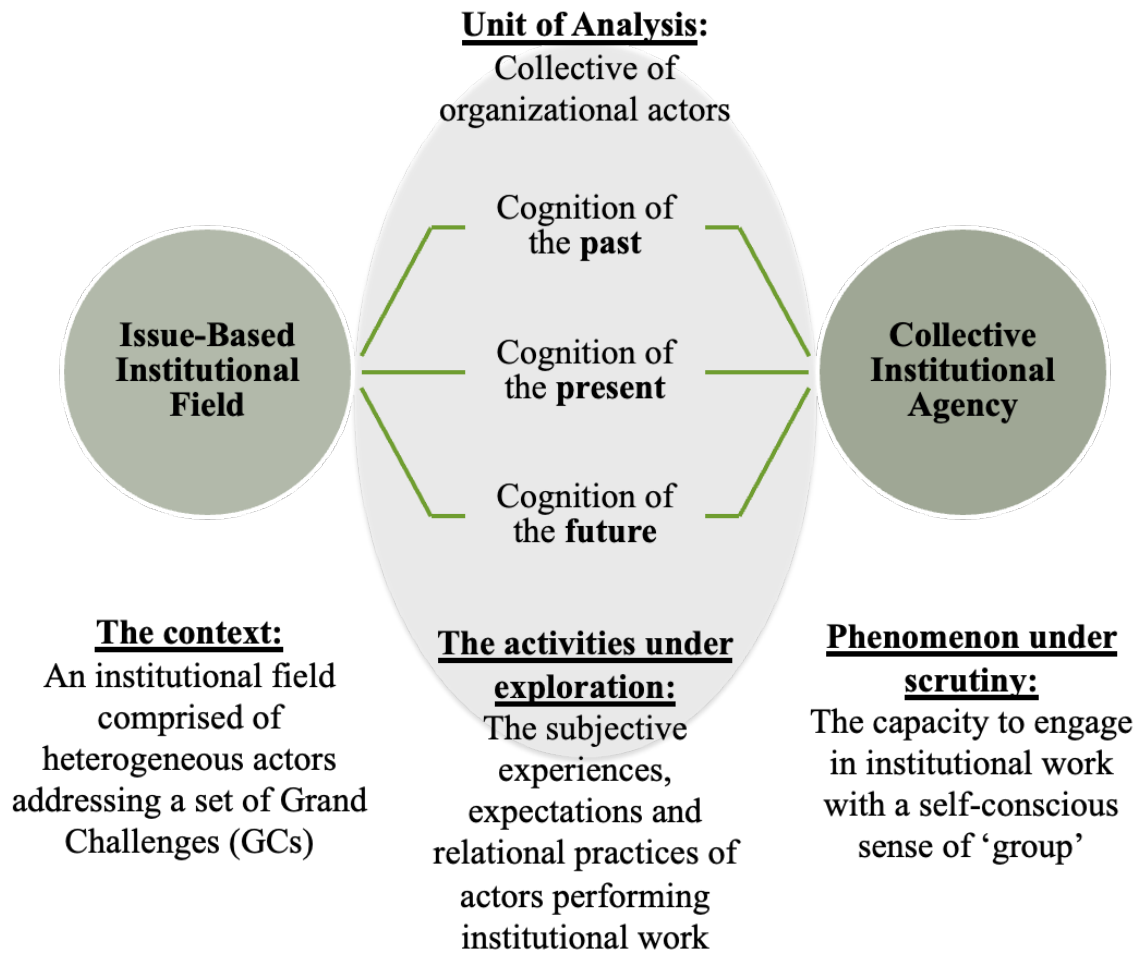
3.2 Research Design

For this study, the phenomenon under question is 'collective institutional agency' and the unit of analysis is a collective comprised of heterogeneous actors. Importantly, I needed to understand the level of analysis with which a collective could be engaged. This was more challenging than one might presuppose. Within collectives, some actors arrive and operate with an organizational orientation, while others engage with an individual orientation. In most cases, actors engage with a complex interplay of both. Both practically and phenomenologically, a collective actor can be studied as a composite of the individual subjectivities of its members. Therefore, the unit of case analysis for this study is multi-layered: the network (the collective) was the primary unit of analysis, while the organization and its actor-representatives were analyzed as the components of the collective. Delving deeper, the organization can be analyzed as an intersubjective actor made up of the subjectivities of individuals, just as the collective is analyzed as an intersubjective actor made up of the subjectivities of individuals engaged in intersubjective organizations. Therefore, the aim of the research is to identify those experiences, expectations and practices that emerge across these subjectivities, not as summations of individual subjective experiences but as shared subjective experiences that reflect a common patterning in organizations participating in the collective as well as the institutional field in which the collective exists.

With the lens of institutional work as a guide, this study “relies heavily on the concept of practice as a bridge between people’s reflexive, purposive efforts and the institutions at which those efforts are aimed” (Hampel et al., 2017). Combined with the understanding of agency as a multifaceted, processual concept comprised of past, present and future orientations (Emirbayer & Mische, 1998), the research delves deeply into an issue-based institutional field (a set of GCs, represented by the SDGs). It does this by exploring the nuanced experiences of heterogeneous organizational actors operating within these GCs, and

the way that these experiences motivated members to form a collective. The research then follows the initiation of a collective (Catalyst 2030, the case study in question) and the pursuit of collaborative work, while seeking to understand the mindsets and expectations with which these organizational actors joined together. Finally, the study observes the practices through which the actors in the collective sustain their work together, in light of pluralistic views of the past, present and future, and pursue the creation, disruption and maintenance of institutions in the broader institutional field. By exploring how heterogeneous organizational actors initiate and sustain their collaborative efforts toward institutional work, the research aims to identify the ways in which shared cognitions of the past, present and future come together to form the phenomenon under scrutiny: collective institutional agency.

Figure 1: Research Design



3.3 Case Study Selection

This research required careful consideration of an appropriate case study. When using case studies to build theory, sampling of cases is theoretical rather than statistical (Eisenhardt, 1989; Glaser & Strauss, 1967). Therefore, I was seeking an “information-rich” (Miles & Huberman, 1994, p. 28) case study “where the focal phenomenon is likely to occur” (Eisenhardt, 2021, p. 149)., the phenomenon for this study being the construction of collective institutional agency. Furthermore, with an inductive approach, there were no predetermined hypotheses being tested; rather, the case study needed to provide a place in which to explore the experiences of heterogeneous organizational actors addressing GCs and engaging in constructive collaboration over a period of time. Specifically, the case study for this research required three characteristics: (1) heterogeneous organizational actors

addressing GCs; (2) relationships that were in various stages of development, including those that were unknown and unacknowledged; and (3) evidence of continuous and constructive engagement over a sustained period of time. It was important that the organizational actors in question were engaging with the complexity, uncertainty and evaluativity of GCs in ‘real-time’, not as a one-off exercise, but rather as an ongoing set of challenges with which to grapple.

By applying Ferraro and colleagues’ (2017) definition of a ‘participatory architecture’, I was able to identify a prospective collective, Catalyst 2030, a network of thousands of organizational actors with the stated objective of “collaborating to achieve the SDGs” (Catalyst 2030, n.d.-e). Importantly, the network (or collective) was comprised of heterogeneous actors from multiple sectors and geographies, with multiple organizational forms. Furthermore, these organizational actors were engaged in numerous and multifaceted relationships at different stages of development. Furthermore, at the time of identification, Catalyst 2030 had been operating in a constructive manner for over a year, and there were positive signs that they would continue to do so for the foreseeable future. In the next section, I will delve into the case study as an appropriate research site and in the following chapter, I will provide the full description of the case study.

3.4 The Case Study as Research Site

In the literature review, I assembled several scholarly accounts to derive the definition of the collective actor for the study. Based on this definition, I had three parameters for identifying a study site. First, I required a setting where a group of heterogeneous organizational actors was engaging with one another in the address of Grand Challenges (GCs). Second, I needed to ensure that these actors were forming relationships, some which were firmly established and others which were in the early or formative stages, within an issue-based institutional field. Third, I desired a setting where these actors were continually

and constructively engaging with one another over a sustained period of time. In this section, I will lay out the specific features of Catalyst 2030 which demonstrate these parameters and which I believe make it a robust case study for this research.

Parameter 1: Heterogeneous organizational actors addressing GCs

As explored in the literature review, the features of GCs—complexity, uncertainty and evaluativity—both guarantee and necessitate the involvement of heterogeneous organizational actors (Ferraro et al, 2015) in addressing them. Yet, heterogeneity can have many dimensions and is not always clearly depicted in the literature. Heterogeneity can refer to dissimilarity in organizational form (Selsky & Parker, 2005), logics (Thornton et al., 2012), philosophies (Dietz et al., 2003) and even power (Clegg, 2010). Further complicating the matter, organizational actors have features of heterogeneity that are ascribed to the organization itself, as well as features that reside in the life experiences and identities of the individuals who represent the organization. The presence and purpose of heterogeneity in addressing GCs is partly due to the different interpretations of these challenges held by organizational actors. Institutional scholars have shown that new institutions are often derived from interactions between actors from different fields (Gray et al., 2015; W. W. Powell & Sandholtz, 2012) and employing different logics (Seo & Creed, 2002). Therefore, it is possible to explore many facets of dissimilarity—organizational and individual—which provide the possibility of a different interpretation of a GC and are therefore useful in generating possibilities for institutional change.

To understand the heterogeneity of the membership, I outline below the network's diverse features while distinguishing between the aspects of heterogeneity ascribed to the organization itself, and the aspects of heterogeneity that are carried by the individual representatives of organizations.

From an organizational perspective, Catalyst 2030 members exhibit three primary features of heterogeneity: geography, organizational type and issue area. These categories can be enumerated at a high level because this data is captured in the application and onboarding process:

- **Geography:** As of writing, members of Catalyst 2030 were present and operating in 134 countries.
- **Organizational Type:** During the application process, members self-identified as one of nine stakeholder groups, including social enterprise, civil society, academic, private sector, funder, media, government, intermediary and coalition/network. The majority of members identified as ‘social enterprises’ (43%), followed by ‘civil society’ (19%), ‘intermediaries’ (12%), ‘private sector’ (10%), and ‘academic’ (6.5%).
- **Focus Area:** Collectively, members address edall 17 SDGs, with organizations selecting one or more SDGs as their area of programmatic focus.

From an individual perspective, Catalyst 2030 members exhibited the following diverse characteristics. These categories unfortunately are not enumerated since the data is not captured in the application and onboarding process. However, I have provided detail based on my observations and interviews:

- **Nationality:** Members represented a wide range of nationalities. Members, to a certain degree, could be classified as ‘local’ or ‘international’, meaning that some members operated in the local context where they were born and/or raised, while others operated in a context different from their home nationality. Additionally, some

members also had more than two cultures in their cultural repertoire. For example, members may have been born in one country, educated in a third country, and now living and working in a third country.

- **Cultural Background:** Members identified with many different racial, ethnic, linguistic and cultural heritages. These heritages were visibly brought into the network in many ways, such as running meetings with language translation services, inviting members to open sessions with culturally significant practices, and honoring local adaptations to network structures in regional and country chapters.
- **Educational Background:** Members had a diverse range of educational backgrounds. Members ranged from those with very little educational background to those with extensive academic qualifications. That being said, the founder members were largely university-educated, bringing up concern that those with less education might not feel comfortable in the network. One member with a doctorate expressed her worry that members with less formal education may not feel included: “I feel absolutely comfortable asking what something means. For somebody who has not read as much as I have they may think that they don’t know because they have not read enough...They think they don’t understand because they are not exposed or learned enough and then...they feel uncomfortable and leave.”
- **Career Background:** Members had a wide range of career backgrounds, including sectors and functional roles. While some members had been working in social purpose organizations for their entire career, others had migrated from other sectors, such as mainstream business and finance, science and research, and the arts. One member even began their career as a professional golf caddy, which they described as a perfect introduction to experiencing diverse people and countries.

Parameter 2: Forming relationships while operating in an institutional field

In the definition of the collective actor derived in the literature review, I specifically highlighted relationships within issue-based institutional fields as a key feature. I noted that these relationships were “multiplex” (W. W. Powell & Oberg, 2017) in that they were multi-faceted, involving multiple relationship types, formal and informal partnerships, and even might be unacknowledged or yet-to-be known. In the section below I will outline how Catalyst 2030 represented organizational actors operating within (1) a multiplex of relationships; and (2) an issue-based institutional field with a shared meaning system.

Multiplex of relationships

Catalyst 2030 existed to connect individuals across organizations in a web of relationships, creating greater density amongst organizational actors working on the SDGs. One interviewee described this as “networks on top of networks” [35]. When actors operate in this type of a multiplex, they often have multiple types of relationships even with the same actor. This creates the ability for interactions to be rich and multi-faceted: for example, an actor may be both friend and competitor and collaborator within a single relationship (W. W. Powell & Oberg, 2017). Moreover, through its activities and sub-groupings, Catalyst 2030 ensured that these connections are not just one-off interactions, but rather durable relationships that built over time through repeated and regularly scheduled interactions.

Although Catalyst 2030 offered formal connection services through its Buddy System, One-on-One Calls and Conversation Cafes, in my experience most of the relationships were initiated and evolved organically. During my observation period, I observed that members would generally become aware of a prospective colleague through a meeting or a shared connection. They might then progress this relationship with an email and an informal video chat where they shared their current projects and goals, as well as additional contacts that

might be useful to each other. This conversation would then either lead to additional calls and meetings, with the anticipation of shared learning or programmatic work, or it may result in follow-on conversations with additional members. In my own experience, as well as the experience of the interviewees, Catalyst 2030 members were uniquely disposed to sharing their contacts with each other and to consider themselves peers, more like an alumni or friendship network as opposed to a professional network. One member described this in relation to a prominent senior leader, “You know, I met [prominent member], I think four years ago, and I never [would] think in my mind to call him for anything...right now, I feel that I can send an email, I can call them. And they [call] me back...not because I am who I am, it's because I am part of this movement, you know, they feel that they are part of the movement.” [42]

One of the benefits of the density of relationships within Catalyst 2030 was that relationships get reinforced and multiply even when members were not in constant communication with one another. For example, I noticed that conversations with members would often start by identifying the colleagues and acquaintances that they shared and then exchanging information about these relationships. In this way, members were made aware of the ‘yet-to-be-known’ relationships that already existed in the network. As these relationships become formalized and acknowledged, they created a sense of familiarity and camaraderie in the group, sometimes referred to as a ‘tribe’ in network parlance.

Issue-based institutional field

In the literature review, I referred to Scott’s enduring definition of an institutional field, namely "a community of organizations that partakes of a common meaning system and whose participants interact more frequently and fatefully with one another than with actors outside of the field" (W. R. Scott, 2001, p. 56). Moreover, the literature emphasized that

institutional fields become structured through the constitution and re-constitution of three elements: positions, understandings and rules (Battilana, 2006; Hardy & Maguire, 2010; Zilber, 2008). For the purposes of this study, I was seeking a group of organizational actors operating within an issue-based institutional field focused on a GC, in this case the SDGs. This search brought up an important set of questions: what types of interactions and activities would signal a “common meaning system”? And how would this be revealed in a field constituted around a GC? To understand Catalyst 2030 as an institutional field, it was helpful to analyze the three elements in turn:

- **Positions:** In institutional fields, organizational actors occupy specific social positions in relation to other actors, and these positions provide different perspectives from which to view the field. Actors’ awareness of their own positions and that of others creates cognition and meaning within the field. In Catalyst 2030, this awareness was initially ‘taken for granted’ since most of the founding members were aware of each other’s positionality in the group prior to joining. These positions had been long established by members’ inclusion in the ‘elite’ networks of social entrepreneurs hosted by Ashoka, Echoing Green, and the Schwab and Skoll Foundations. Interestingly, as newer members from other sectors joined the group, positions were less understood and needed to be constituted through repeated interaction and the forging of respect and trust. As this need grew, the membership process became more elaborate, providing a stage of community vetting which replaced the initial ‘friends & family’ style of positioning. The awareness of positions and the tacit acknowledgement by members due to the vetting process for membership within the collective indicates that it is operating within an institutional field.

- **Understandings:** According to Hardy & Maguire (2010a), understandings are taken-for-granted modes of behaviour and meanings ascribed to actions. When actors arrive in a new field, they are acculturated to field understandings by observing how others act and behave, and by experimenting with their own behaviours and actions. In Catalyst 2030, these understandings operated beneath the surface and had a history that preceded the formation of the network. As a network formed through relationships established in another set of networks, some of the understandings were directly borrowed from these original networks, such as the terminology that was used amongst members to describe themselves (social entrepreneurs, social innovators). At the same time, other ways of behaving and interacting were in stark contrast to these original networks, such as not promoting one's organization or status in meetings which was likely a mode of behaviour adopted to counteract the perceived elitism of these earlier networks. Since these understandings were shaped through relationships formed over decades, they could be confusing to new members as they navigated the network. However, the existence of understandings and the efforts by new members to learn these modes of behaviour and meanings was evidence that the network is operating within an institutional field.
- **Rules:** Institutional fields are also comprised of formal rules, such as laws, protocols and professional standards. For a membership network like Catalyst 2030, these rules governed membership eligibility, staff employment, activity development, sub-grouping formation and funding. In Catalyst 2030, these rules were largely established through the Governing Council and carried out by the Secretariat, but there was also a great deal of input and feedback from the broader membership which guided rule-making, ensuring that it was a more fluid and responsive process. Rules

are most apparent in an institutional field when there is a perception that they have been transgressed by members. This was certainly the case in Catalyst 2030, where rules had occasionally become a source of contention as members struggled to ensure that the network was reflecting the values that it purports. One of the tensions that consumed the network during the observation period was funding for chapters and WGs. Many of the founding members—often belonging to well-resourced organizations—originally believed that member activities should be purely voluntary and not resourced by the network, but rather through the time and monetary contributions of members. However, as new members joined, often from smaller or less-resourced organizations in Global South countries, this rule was tested. New members struggled to devote significant time to the network when their primary activities were related to fundraising for their own organizations. Through a series of turbulent meetings, the Governing Council decided to establish an internal grant-making mechanism to fund a subset of WGs and initiatives. However, developing this mechanism, comprised of myriad steps and hurdles, was fraught as members sought to change the rules. Eventually the new grantmaking process launched and successfully channeled funding to WGs and member-led initiatives, however it remained contentious. This example, as well as many others, was strongly suggestive that Catalyst 2030 was operating within an institutional field.

Constructive and sustained collaboration

Lastly, I needed to ensure that the collective being studied had engaged in constructive collaboration over a sustained period of time. While this feature seems clear and straightforward, it is also very subjective. What constitutes constructive collaboration? What is a sustained period of time? Ultimately, I chose to review Catalyst 2030's internal markers as

evidence that members had set for themselves and determine whether these measures of success were headed in a positive direction toward constructive and sustained engagement.

- **Constructive collaboration:** Catalyst 2030 catalogues and tracks the collaborations that are emerging from the network. When I joined Catalyst 2030, the number of collaborations had recently been reduced to 25 active collaborations. This number grew to 106 at the time of writing. These collaborations ranged from single projects with shared goals and resources to elaborate long-term partnerships that required outside funding, new entity creation and broader engagement with non-Catalyst 2030 stakeholders. For the purposes of this study, I saw the growth in the number of collaborations and the continued engagement amongst collaboration members as signals that constructive collaboration is indeed occurring amongst network members.
- **Sustained period of time:** Catalyst 2030 was founded in 2019 by a small group of approximately 50 founding members. It grew over four years to the size of 2737 organizational members at the time of writing. While this amount of time still qualifies Catalyst 2030 as a ‘young’ organization, it notably endured a global pandemic and many internal conflicts and growing pains. Understandably, the network experienced the frustrations of ebbing membership involvement and funding cycles. However, during the study, the network showed little to no threat of diminished membership numbers or closure. For the purposes of this study, this period of time seems sufficient longevity to warrant Catalyst 2030 as an appropriate case study site.

3.5 Ethical Considerations

This study was performed in accordance with University of Cape Town Faculty of

Commerce Ethics in Research policy. Since the research included human participants, I obtained ethical clearance from the Ethics Committee. All individual and organizational details were subject to rigorous anonymizing protocols. I acted as the data steward during data collection, coding, analysis, and publication phases of the project, and was responsible for documenting and managing the data throughout this time. Data was housed in a password-protected laptop computer as well as a password-protected cloud software platform. Participants were assigned unique identification numbers, which were associated with any participant data that was collected, entered, and analyzed for the study. The link between participants' names and study ID numbers was kept in a separate electronic file, ensuring that all data prepared for analysis was de-identified.

For interviews, participants were given a full overview of the research and recording process prior to participation. An informed consent form (see Appendix B: Informed Consent Form) with the research study details was distributed prior to each interview. Interview participants were given the option to participate anonymously and the option to withdraw from the study at any time without explanation. Interview participants were asked for consent (either written or verbal) prior to recording their comments. All consent documentation was carefully maintained.

Due to the topic of the research, there was no perceived risk to research participants over the course of the study period. However, due to the nature of social purpose work, caution and care were taken at all times to understand the context of the interview participants, and to prepare interview situations to accommodate participants' needs and interests. While the interviews were primarily dealing with the professional life of participants, the nature of social purpose work is such that members bring their "whole selves" to their work and vice versa. The boundaries between professional and personal life are necessarily blurred when participants are addressing GCs, since these are challenges which do not neatly fit within

organizational boundaries. Furthermore, many of my participants had been working in their respective fields for decades, with significant exposure to highs and lows; their work is, understandably, a large part of their identity and personal narrative. Therefore, my interview subjects often delved into highly personal and emotional matters while they unpacked their experiences and journeys. I treated these moments with respect and admiration for the significant energy and wherewithal that these social purpose leaders exhibited throughout their lives, allowing time for interviewees to delve into the aspects of their work that seemed pertinent and never rushing along the conversation for my own research purposes. In fact, I believe these moments and the rapport that I strove to create in the interview process allowed the experiential nature of GC work to be revealed more clearly. I feel extremely grateful to the interview participants for their willingness to open up about their lives and their extraordinary work.

For the observation period, as noted in the subsequent chapter, I became part of the Catalyst 2030 network as a member, undertaking the same journey as other members and participating fully in the life of the network. I was also engaged for a six-month period in 2022 as a part-time contract writer for the network, which gave me privileged access to the inner-workings of the Secretariat and an insider look at the history and functioning of the organization. I therefore needed to pay particular attention to the ethical nature of my engagement as a researcher deeply embedded in the context and ensure that I constantly reflected on my “insider/outsider” status as I collected and analyzed the data.

Participant observation raises ethical dilemmas for the research process, since it is rarely possible to identify oneself as a researcher in each and every context that one finds oneself. For example, I attended many General Assembly meetings where introductions were inappropriate due to 100+ participants and a tight agenda. However, in small group settings, I was careful to introduce myself as a Phd student researcher and make myself available for

questions about the research. I was also gratified to hear from many members about their interest in the research and I was given periodic opportunities, both formal and informal, to present the research to various groups and gain their feedback. In all cases, I ensured that the anonymity of participants was preserved.

Finally, I was careful to take periodic moments to journal and reflect on my positionality as an embedded researcher and ensure that I was carrying out the observation with awareness of the experiences and identities that I brought into each observation instance (Hsiung, 2010). For example, in my observation note-taking, I would periodically write in the margins of my notes about the feelings and sensations that I was “reading” in the room, and then reflect on my own sensations (“yikes!”, “cliques?”) that I experienced during that moment. When reviewing these observations, I would use these small margin notes as an opportunity to reflect on why my own identities and personality traits might lead me to sense these moments in the room. Through embedded participant observation—particularly during the 4-day board retreat that I attended—I was also able to experience many of the joyful moments that sustained members’ engagement, which would later lead me to emphasize “fun & camaraderie” as a key emotion in the ambiguous path to address GCs. These moments included laughter, fatigue, hugs, walks in the sunshine, after-dinner dancing, and probably more than my fair share of delicious meals in the company of an awe-inspiring group of social purpose leaders.

In other words, members of Catalyst 2030 were not just interview and observation subjects to me—they became friends. Far from being “problematic”, due to the intersubjectivity and relationality of the research that I was conducting, I believe this positionality (“researcher-colleague-friend”) led to findings that were far more sensitive to the life experiences of social purpose leaders and, ultimately, more useful to building knowledge about how these actors come together and sustain efforts to address GCs.

3.6 Data Collection

To study a multi-layered case study such as Catalyst 2030, I took an embedded approach to data collection and used all of the qualitative tools at my disposal. I developed a data collective plan that would allow me to spend time within each of the layers of the unit of study—individual, organizational and collective—trying to perceive, discern and understand the experiences, expectations and practices that were occurring amongst members. By observing organizational actors in relationship with one another at each of these layers, I hoped to understand how these activities affected and shaped the collective cognition of past, present and future, deriving a sense of ‘group’ that constitutes collective agency. Ultimately, the goal was to witness—in exquisite detail—the process by which a single collective develops this group capacity to perform institutional work, and use this to describe the phenomenon of collective institutional agency.

I conducted the data collection in four phases, with some of the approaches overlapping in the intervening periods. First, I conducted an exploratory phase where I became part of the membership and engaged in an in-depth, in-person meeting of the network leadership. This phase was critical since it allowed me to gain an overview of the network, understand its history and contours, gain trust from members, and plan my data collection further. In the second phase, I conducted 48 semi-structured, online interviews with members from across the network. In the third phase, I actively participated in the network, performing participant observation while joining working groups and spending time in the Governing Council and General Assembly. Finally, I corroborated these data sources with archival review of meeting minutes, video recordings, internal documents, and externally-facing website pages and reports.

Figure 1: Data Sources and Use in the Analysis

Type	Source	Analysis Use
<i>Semi-structured interviews</i>	<ul style="list-style-type: none"> • 48 semi-structured interviews • Conducted and recorded via Zoom • Manually transcribed verbatim by a professional transcriber • Approx. 55 hours of material 	<ul style="list-style-type: none"> • Understanding prior experiences of members that motivated them to join the network • Identifying the expectations with which members joined the network • Discerning practices that comprise relational institutional work in the network • Determining sources of satisfaction and dissatisfaction with the network and fellow members
<i>Participant Observation</i>	<ul style="list-style-type: none"> • In-person, 4-day board convening with approx. 35 members • General Assemblies and Governing Council meetings (Approx. 16) • Working group and other sub-grouping and individual meetings (Approx. 24) 	<ul style="list-style-type: none"> • Sense-making to understand how the network is structured and the priorities and interests of members • Selecting a diverse group of possible interviewees • Identifying the relationship dynamics between members, including ways of interacting and sources of conviviality and friction • Detailing potential practices identified in the interviews that comprise relational institutional work
<i>Archival data</i>	<ul style="list-style-type: none"> • Website pages and blog posts (19) • Video recordings public-facing (Approx. 10) • Internal videos and documents (Powerpoint documents, Meeting recordings, Working drafts) (183 documents) • General Assembly meeting minutes (35 documents) • Governing Council meeting minutes (75 documents) 	<ul style="list-style-type: none"> • Developing an historical timeline of the network • Identifying how the network portrays itself to potential members and external stakeholders • Identifying inconsistencies in the personal reflections of interviewees and the public portrayal of the network's work • Understanding how the practices that comprise relational institutional work unfolds over time

Phase 1: Exploratory Data Collection

Data collection began with an exploratory phase that enabled me to understand the network and observe its relationships first-hand. In order to understand the membership selection and enrolment process, I applied for membership, was accepted, and attended the onboarding session for new members. I then joined a four-day, in-person annual convening for approximately 35 key members in Althorp, United Kingdom. This convening consisted of several formats: plenary discussions, small committee breakout groups, hybrid sessions with regional and country chapters, and informal meals and cocktail hours. During this time, I was able to observe the culture and norms of the network while understanding the key issues and challenges that were of importance to the group. Additionally, I observed the relationships between network members, including the convivial nature of their interactions as well as the sources of frustrations and frictions that naturally arose during their time together. On the

final day of the convening, I was able to meet with the network's founder and she narrated to me a timeline of events that had led to the formation and the development of the network. Over the course of the convening, I took copious handwritten notes, often with verbatim quotes, which proved invaluable in the stages that followed. This sense-making phase was vital in helping me to understand the context and scope of the network, which allowed me to then segue into the technical phase of conducting individual interviews, observing various meetings of the network and its sub-groupings, and collecting archival data.

Phase 2: Individual Interviews

The aim of the interviewee sampling was to maximize heterogeneity, ensuring a diverse representation of geographic regions, organizational types, and sub-grouping involvement. Sampling, therefore, needed to be purposive and stratified with the aim of maximum variation illustrating these three areas of heterogeneity (Miles & Huberman, 1994). As opposed to other sampling methods, such as random (selecting interviewees based on a random selection procedure) or convenience (based on ease and proximity to the researcher), purposive sampling requires that interviewees be selected for their unique and possibly generative contribution to the phenomenon in question (Mason, 2002; Robinson, 2014). I determined that I would select interviewees stratified to represent the following: (a) all geographic regions; (b) all organizational types; and (c) all types of subgroups that the network had developed to channel activities and encourage collaboration. I aimed to secure interviews from at least two or more of each type of stratification category. While the universe of interviewees was equal to the number of network members, I also needed to ensure that the interviewees were able to speak to the historical evolution of the network. Therefore, I limited the interviewee population to those members who had either (a) been present during the founding year of Catalyst 2030; and/or (b) founded a country chapter in

the early years of the network.

Following the in-person convening, I developed a list of prospective interviewees based on my consultation with the founder as well as participant observation during the in-person convening. I ensured that this list of interviewees represented multiple participants from each of the three stratification categories of heterogeneity described above. Interview requests were sent by the founder to 60 prospective participants and I received positive responses from 48 members. Interviews were conducted between December 2021 and April 2022 via Zoom and each interview lasted approximately 60 minutes. Interviews were anonymized, transcribed verbatim and stored in password-protected folders.

To conduct the interviews, I developed a semi-structured interview protocol (see Interview Protocol, Appendix A) with question sets that gave me the flexibility to pursue questions and opportunities for exploration based on the responses from the interviewee. Interviews opened with a question related to organizational type, where interviewees were asked to identify the type of organization with which they were affiliated from a list that I inserted into the chatbox. Once they had identified their organizational type, I then asked a broad question about how they came to be part of Catalyst 2030 and what they hoped to achieve, organizationally and personally. I found this question elicited important insights into the experience of GCs and the motivating factors that led them to join the network. I also noticed that many participants used this question to provide a more detailed account of their career journey, going beyond their current organizational affiliation and narrating their personal feelings and aspirations along the way. I then asked interviewees to identify any changes that they had made to their initial aspirations and identify key milestones they felt were pivotal or important. This question allowed me insight into what participants deemed important about their involvement in Catalyst 2030 and where they had felt engagement and/or frustration in their experience thus far.

After these initial questions, I delved into the experience of being part of Catalyst 2030, asking questions about enablers and obstacles to achieving their original aspirations, as well as the ways in which they experienced their own role and involvement. These questions were helpful in hearing in participants' own words their reflections about how they had sustained their involvement (or, in some cases, not sustained involvement). These questions naturally segued into the heart of the interview, where I asked multiple questions about the relationships that they had formed over the course of their engagement with the network. In several interviews, I did not even have to explicitly ask these questions; rather, participants moved into them as a matter of course through their personal reflections. I wrapped up the interview by posing two 'bigger picture' questions, asking them to compare their experience with Catalyst 2030 to other networks in which they had been involved, as well as prompting them to look into the future to see what they hoped for the network in the period of three to five years.

Phase 3: Participant Observation

Participant observation was critical to the data collection since I was aiming to bring forward the experiences and 'day-to-day' reality of organizational actors addressing complex, uncertain and evaluative problems. While a great deal of institutional work scholarship has been done retrospectively through archival data and interviews, Lawrence et al., (2013) point out that there may be much to be gained from using additional qualitative methods, such as ethnography, to augment the understanding of institutional work. Participant observation is an ethnographic method in which the researcher is playing a recognized role in the study site (Atkinson & Hammersley, 1998). More specifically, participant observation "is a method in which a researcher takes part in the daily activities, rituals, interactions, and events of a group of people as one of the means of learning the explicit and tacit aspects of their life routines

and their culture.” (Musante & DeWalt, 2010, p. 1) According to Atkinson & Hammersley, p. (1998, p. 249), participant observation “represents a uniquely humanistic, interpretive approach, as opposed to supposedly “scientific” and “positivist” positions.” Yet, as a method, participant observation has been the subject of controversy, with tensions between those schools of thought which emphasize ‘objectivity’ and those that encourage engagement and criticality (Czarniawska, 2017). In light of these controversies and possibilities, I approached participant observation both from a practical standpoint—my access to the study site was conditional on becoming a member, and membership required contribution—and as a “romantic” (Czarniawska, 2017, p. 3), with the belief that the subject of experience is more easily discernible by “being-in-the-world” (Atkinson & Hammersley, 1998, p. 249) that is being studied. However, I was also conscious that participant observation requires being constantly in learning mode, reacting to and interpreting events by oscillating between participant and observer with periods of reflection to consolidate these two modes (Musante & DeWalt, 2010).

I therefore undertook several observation periods, aiming to observe as many different interaction types as possible. Over the course of the two-year study period, I attended approximately 6 General Assemblies, 8 Governing Council meetings, and 24 sub-grouping and network meetings. I approached these sessions as both an observer and a participant, with the objective to “hear, see, and begin to experience reality as the participants do.” (Marshall & Rossman, 2014). I took care to be conscious of what was happening, according to all of my senses, while taking note of emerging patterns and any deviations from these patterns. In particular, I was looking for how members engaged with one another, the circumstances and issues that elicited excitement or agitation, frequency and/or changes in the use of terminology, and the ways in which the various sub-groupings shared information, took decisions and organized actions in the intervening periods. Following these sessions, I made

note of observations that provided clarity or raised questions about themes and patterns that I had observed in previous sessions or during the interviews.

Beyond observation, I also directly participated in sessions and projects as a network member. In two Governing Council meetings, I presented back general themes from the research and listened to reactions and analysis from members. I also actively participated in three sub-groupings (two Working Groups and a Task Force). In these settings, I was able to not only observe what fellow members were saying and how they were behaving, but also my own personal experiences within the network. This perspective—albeit subjective—was illuminating, and I used my observations to compare and contrast my own feelings and experiences with the reflections from members in the individual interviews. I strove to be reflexive in these participatory interactions with journal entries, attempting to discern the types of feelings and reactions that I was experiencing and what might be the source and cause.

Phase 4: Archival Review

In addition to individual interviews and observation, I also compiled and reviewed archival materials, some which were publicly available online and others available to members only. I compiled nearly three years' worth of General Assembly and Governing Council minutes, which I mined for specific events and initiatives that progressed over the study period. I also reviewed reports, presentations, working papers and recorded videos from meetings and events. These archival materials (322 files in total) provided deep insight into the historical evolution of the network and the issues that were raised repeatedly over the course of several years. It also allowed me to see how terminology was used and shifted over the timeline of the study.

3.7 Data Analysis

Theory-building from case studies is often done in an iterative fashion, with an overlap between data collection and data analysis (Eisenhardt, 1989; Glaser & Strauss, 1967). I therefore approached the analysis of the study in a staged fashion, occurring concurrently and intermittently with the data collection phase. My analysis took shape in three stages, which I outline below.

Stage 1: Sense-making

The sense-making stage coincided with the initial observation period of the in-person board convening. During this stage, I was able to get a broad sense for how members arrived to the network and the issues that were pertinent to them. In preparation for the convening, I did a high level review of the data archive and during the convening, I reviewed handwritten notes each evening and highlighted key quotes that seemed to capture the essence of the conversations that I was observing. I was careful to observe for situations where the formal representations of the network were dissonant with the ways in which participants were interacting or with the ‘mood in the room’. I used informal conversations to ask participants about the ways in which they were experiencing the convening, and noted any representations that were particularly intense or enthusiastic. I did not perform any coding during this phase, but rather developed broad themes that allowed me to approach the interviews and archival data with a sense for the key topics and concerns that would be relevant.

Stage 2: Coding

Over the five-month interviewing phase, I iterated between conducting interviews and reviewing transcripts, highlighting text that emphasized emerging patterns and themes, as

well as items that seemed surprising or unusual. Once the full set of interviews was transcribed, I imported the documents into NVivo where I performed a substantial portion of my textual coding analysis. Coding was staged and iterative, with the coding structure emerging inductively as I progressed through the interviews (Marshall & Rossman, 2014; Strauss & Corbin, 1998). First-order codes were primarily ‘in vivo’ with the aim of preserving the integrity of the interviewees. These codes were grouped into second-order codes, which were derived from the intent and meaning behind the words that were chosen in a given instance (Gioia et al., 2013).

I coded the transcripts for three distinct categories which allowed me to explore the research questions in turn. Below, I outline the coding categories and a sample of the coding structures which emerged from the effort. While the coding categories appear quite linear in the description below, it is important to note that the process in reality was quite iterative and emergent. As I progressed through the categories, certain codes in previous categories became more clear or apparent. Therefore, the process was not rigidly sequential, but rather done in parallel with each coding category influencing the others.

Coding Category 1: Experiencing a Grand Challenge

In Coding Category 1, I sought to identify instances in the interviews where Catalyst members related their experiences of GCs and how this motivated members to join the network. This coding effort was linked to Research Question 1:

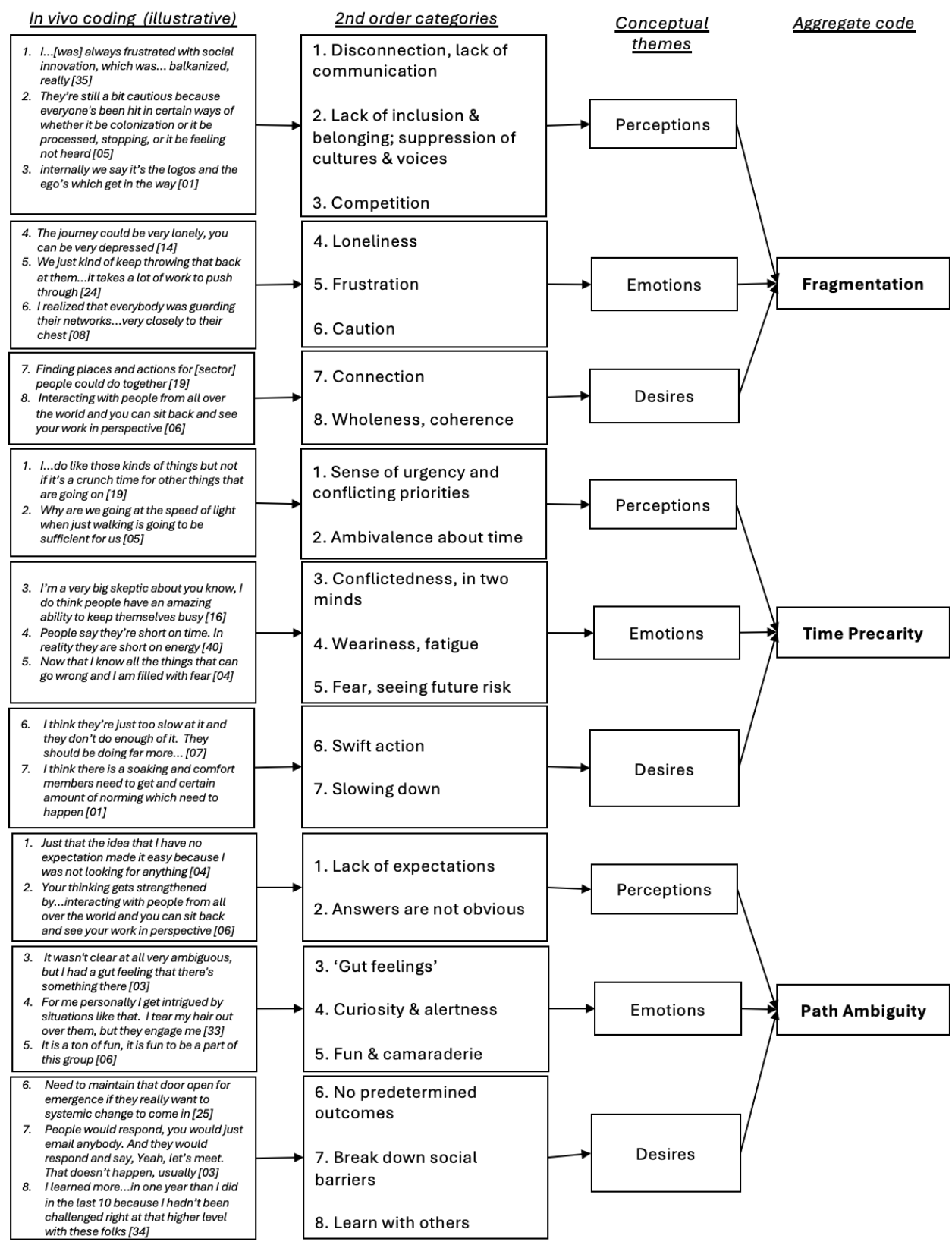
- How do heterogeneous organizational actors experience issue-based institutional fields, such as GCs, in light of their characteristics of complexity, uncertainty and evaluativity?

The aim of this coding exercise was to identify common experience groupings that were

shared by multiple members, although experienced in personal and unique ways. The first-order ‘in vivo’ codes allowed me to see the different ways that members expressed their experience of GCs in the period prior to joining Catalyst 2030. I was particularly attuned to words and phrases that indicated strong emotions and feelings, as well as metaphors that indicated difficulties in expressing a particular concept. After I had reviewed approximately one quarter of the interviews, I exported the code book and began to group these codes into second-order codes. These higher-level codes revealed common patterns in the experiences that were related across the members and I began to see a pattern in the way that experiences were being related.

I then repeated this process with a second set of interviews and continued to iterate between first- and second-order codes until clear themes emerged. Once I had a strong sense of the second-order codes that were becoming most prominent, I exported the coded passages related to these codes and scanned them for consistent patterns, including quotes and narratives that were part of the pattern, as well as anomalies that provided richness and texture. Conceptually, interviewees related their experiences in three distinct ways, namely Perceptions, Emotions, and Desires. Furthermore, when analyzing these passages, I was able to develop a ‘bigger picture’ set of aggregate categories, which related a sense of how these conceptual categories of experiences fit together. At the aggregate level, these codes are later revealed as ‘Experience Sets’ in Chapter 5: Findings 1—Experiencing a Grand Challenge.

Figure 2: Coding Structure—Experiencing a Grand Challenge



Coding Category 2: Initiating Collaborative Work

In Coding Category 2, I coded to understand the expectations that members held when they arrived to the network. This coding effort was linked to Research Question 2:

- What expectations and aspirations do organizational actors have for heterogeneous collaborative arrangements, and how do these expectations influence their behaviours within collectives?

Similarly to Coding Category 1, I reviewed a subset of interviews for first-order ‘in vivo’ codes. In this instance, several key words began to emerge as critical indicators of specific expectations. I then developed second-order codes that built upon these key words, and coded remaining sets of interviews with targeted searches for these key words and phrases, while also remaining open to the discovery of new words and themes. I repeated this process until I had reached ‘theoretical sufficiency’ (Glaser & Strauss, 1967; Marshall & Rossman, 2014; Strauss & Corbin, 1998). These second-order codes are revealed as ‘Collaboration Frames’ in Chapter 6: Findings 2—Initiating Collaborative Work.

Using the NVivo software functionality, I performed a query for each interviewee to graph the number of times that each collaboration frame was coded within the text. I then charted the interviewees against the dominant frames and their organizational type. The aim of this step was to identify a dominant frame for each interviewee. While this analysis was not used to ‘label’ interviewees as a single dominant frame, this step allowed me to quickly access ‘ideal types’ (Gerhardt, 1994) when identifying the dynamics of frames and performing the triangulation analysis described below.

Figure 3: Coding Structure—Collaboration Frames

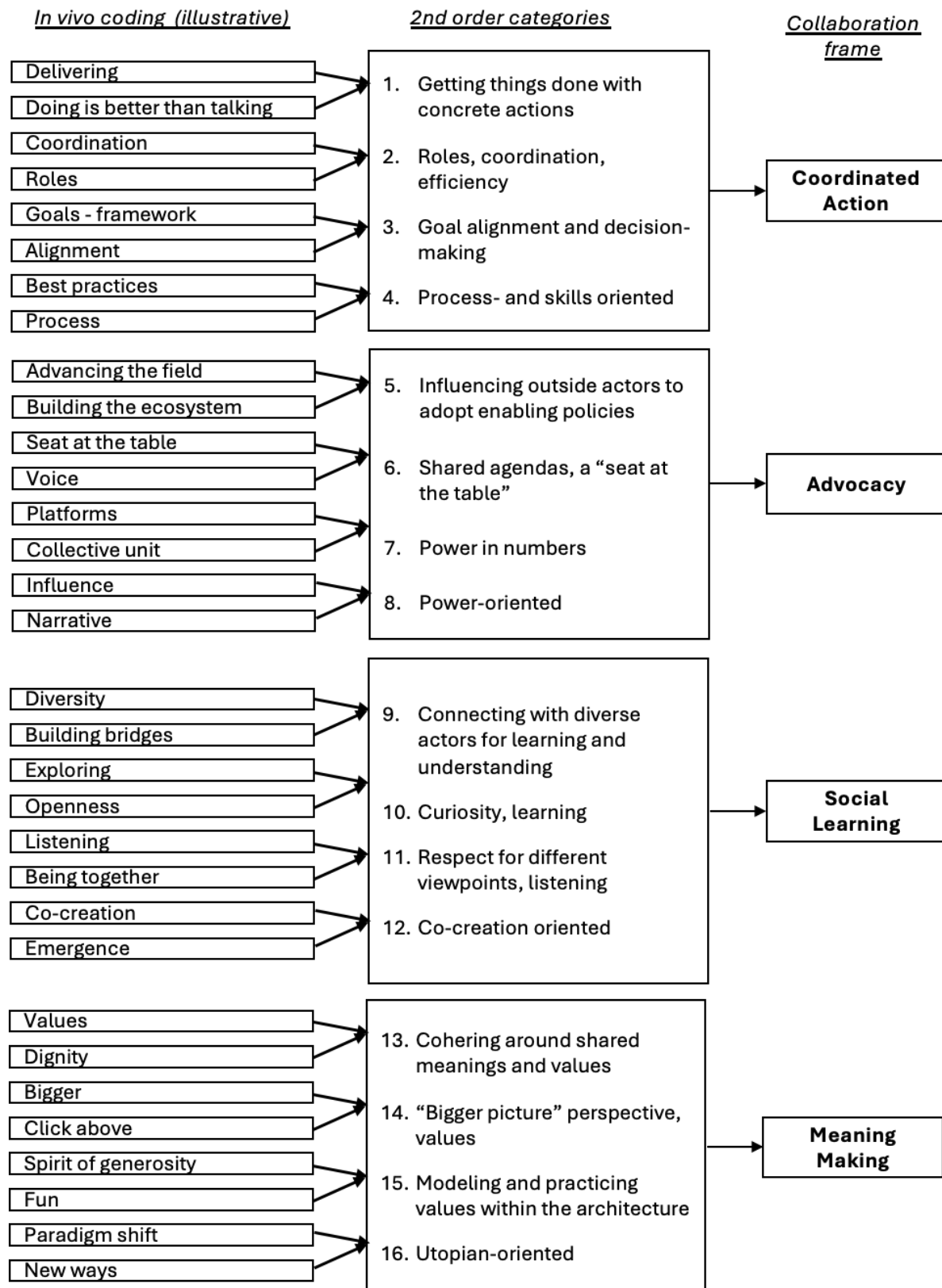


Figure 4: Collaboration Frames Sample Individual Analysis (Interviewee 07)

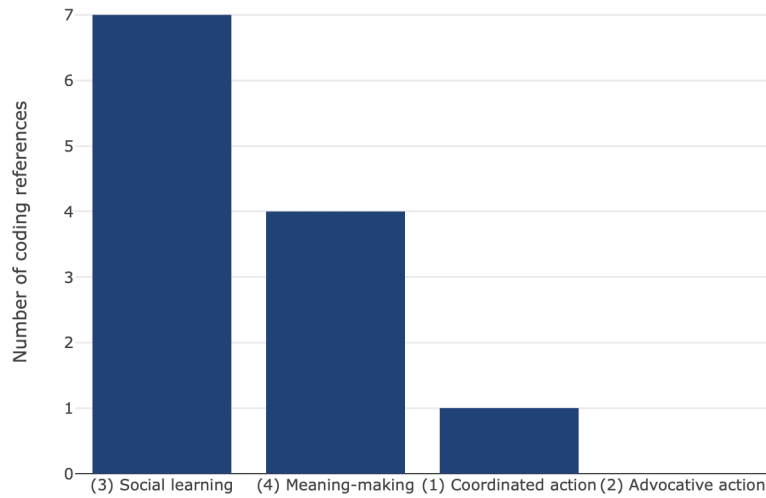


Figure 5: Collaboration Frames Aggregate Analysis

Interview Number	Actor Type	Region	Coordinated Action	Advocative Action	Social Learning	Meaning Making
1	Social Enterprise	Asia Pacific	Low	Medium	High	Low
2	NGO/Non-Profit	Africa	High	Medium	Low	Low
3	Civil Society	Middle East	Medium	Low	Medium	High
4	Social Enterprise	North America	Medium	Low	High	Medium
5	Social Enterprise	Asia Pacific	Low	Low	Medium	High
6	NGO/Non-Profit	Asia Pacific	Low	Medium	Medium	High
7	Social Enterprise	Asia Pacific	Medium	Low	High	Medium
8	Social Enterprise	Africa	Medium	Medium	Medium	High
9	Philanthropic Funder	North America	High	Low	Medium	Medium
10	Philanthropic Funder	North America	Medium	High	Low	Medium
11	NGO/Non-Profit	Europe	Medium	High	Low	Medium
12	Civil Society	Asia Pacific	Medium	High	Low	Low
13	Philanthropic Funder	North America	High	Low	Medium	Low
14	Social Enterprise	Asia Pacific	Medium	High	Medium	Low
15	NGO/Non-Profit	Europe	Low	Low	High	Medium
16	Social Enterprise	Europe	High	Medium	Medium	Low
17	Civil Society	North America	Low	High	Medium	Low
18	Social Enterprise	Africa	Low	High	Medium	Medium
19	Social Movement	Europe	High	Medium	Medium	Low
20	Social Enterprise	Europe	High	Medium	Low	Low
21	Social Enterprise	Europe	High	Low	Medium	Medium
22	Social Movement	Europe	Medium	Low	Low	High
23	NGO/Non-Profit	Latin America	High	Medium	Low	Medium
24	Philanthropic Funder	North America	Medium	Low	Medium	High
25	NGO/Non-Profit	Latin America	Medium	Low	Medium	High
26	NGO/Non-Profit	Middle East	High	Medium	Medium	Low
27	Social Enterprise	Europe	Medium	Low	High	Low
28	NGO/Non-Profit	Latin America	Medium	Low	High	Low
29	Social Enterprise	North America	Low	Low	High	Medium
30	Philanthropic Funder	North America	High	Low	Medium	Medium
31	Philanthropic Funder	North America	Low	High	Low	Medium
32	Social Movement	North America	Low	High	Low	Low
33	Social Movement	North America	Low	Low	High	Medium
34	Academic	North America	Low	Low	High	Medium
35	Social Movement	North America	Medium	High	Medium	Low
36	Social Enterprise	North America	Low	High	Medium	Low
37	Social Enterprise	Asia Pacific	Medium	Low	High	Medium
38	Social Movement	Europe	High	Low	Low	Low
39	NGO/Non-Profit	Europe	High	Medium	Medium	Low
40	Private Sector	Europe	Medium	High	Medium	Low
41	Private Sector	Europe	High	Low	Low	Medium
42	NGO/Non-Profit	Latin America	Medium	Low	High	Medium
43	NGO/Non-Profit	Europe	Low	Medium	High	Medium
44	Social Enterprise	North America	Medium	Low	High	Low
45	NGO/Non-profit	Europe	Low	High	Low	Medium
46	Social Enterprise	North America	High	Medium	Medium	Medium
47	Civil Society	Europe	High	Medium	Low	Low
48	Social Enterprise	Europe	High	Low	Low	Medium

Coding Category 3: Relational Practices

In Coding Category 3, I coded instances of relational practices that were in evidence according to the members' reflections of their own involvement in the network and the descriptions of their relationships to other members. This coding effort was linked to Research Question 2:

- What types of relational practices emerge amongst heterogeneous organizational actors operating within complex, uncertain and evaluative contexts, such as GCs, and how do these practices contribute to the construction of collective agency?

In this coding exercise, very few highlighted passages contained full descriptions of practices; rather, the first-order analysis revealed various combinations of activities, feelings, qualities and outcomes that constituted 'fragments' of practices. These fragments needed to be pieced together to understand the full extent of the practices. Given that the aim of the analysis was to understand relational practices in pursuit of agency, I went back to my theoretical grounding of Emirbayer & Mische, 1998 to identify the appropriate 'frame' upon which to construct the practices. The temporal dimensions of the "chordal triad" proved to be extraordinarily useful. I conducted a series of clustering exercises where I grouped together fragments of practices from different interviews with common temporalities. Codes which were positioned to the future were clustered around the "projective" temporality; codes which were positioned to the past were clustered around the "iterational" temporality; finally, codes positioned to the present were clustered around the "practical-evaluative" temporality. Once the clusters were developed, I was able to return to the interview data and identify larger segments of text that related to different types of practices. This coding exercise then revealed the specific practices that merged into relational work areas. These work practices are revealed as 'Relational Practices' in Chapter 7: Findings 3—Relational Practices of

Figure 6: Chordal Triad Clustering

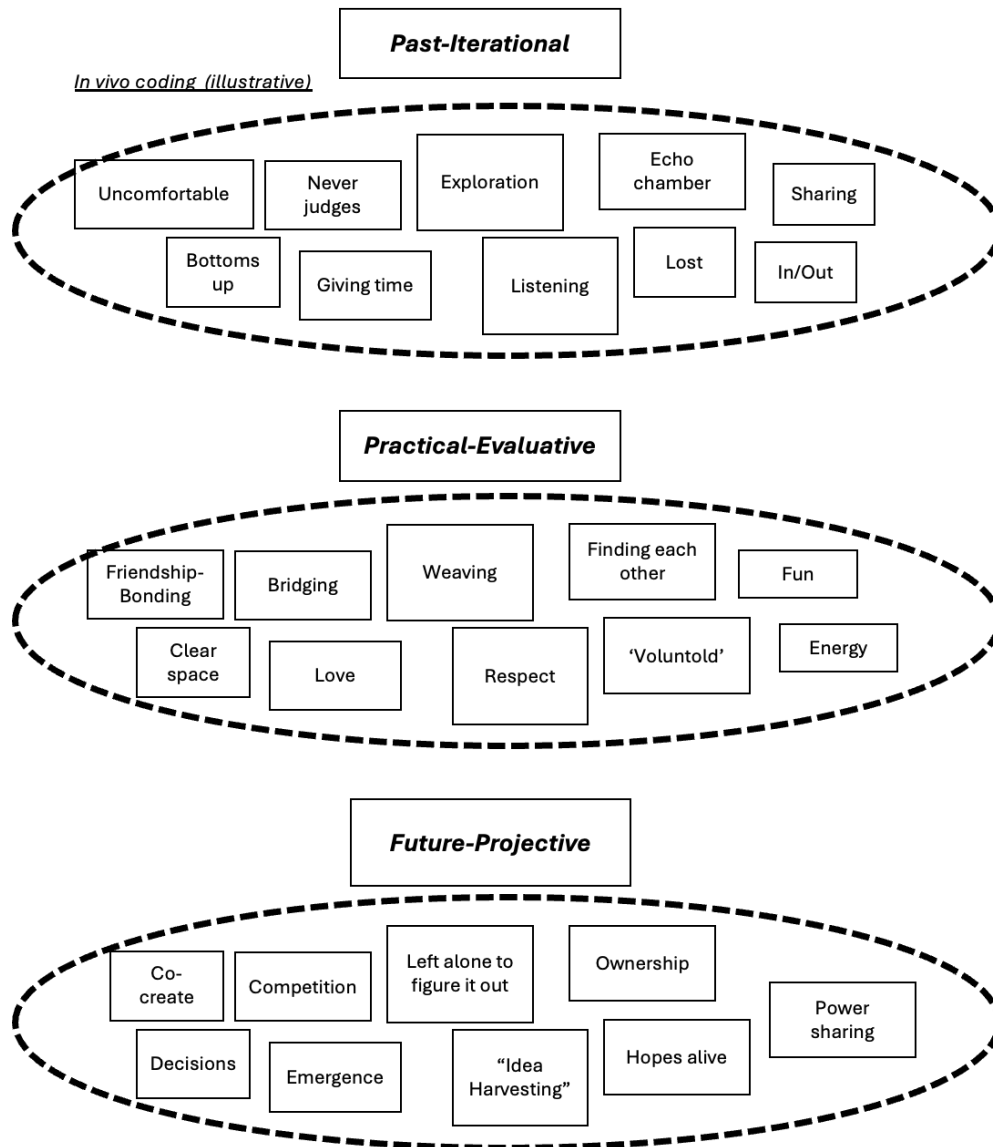
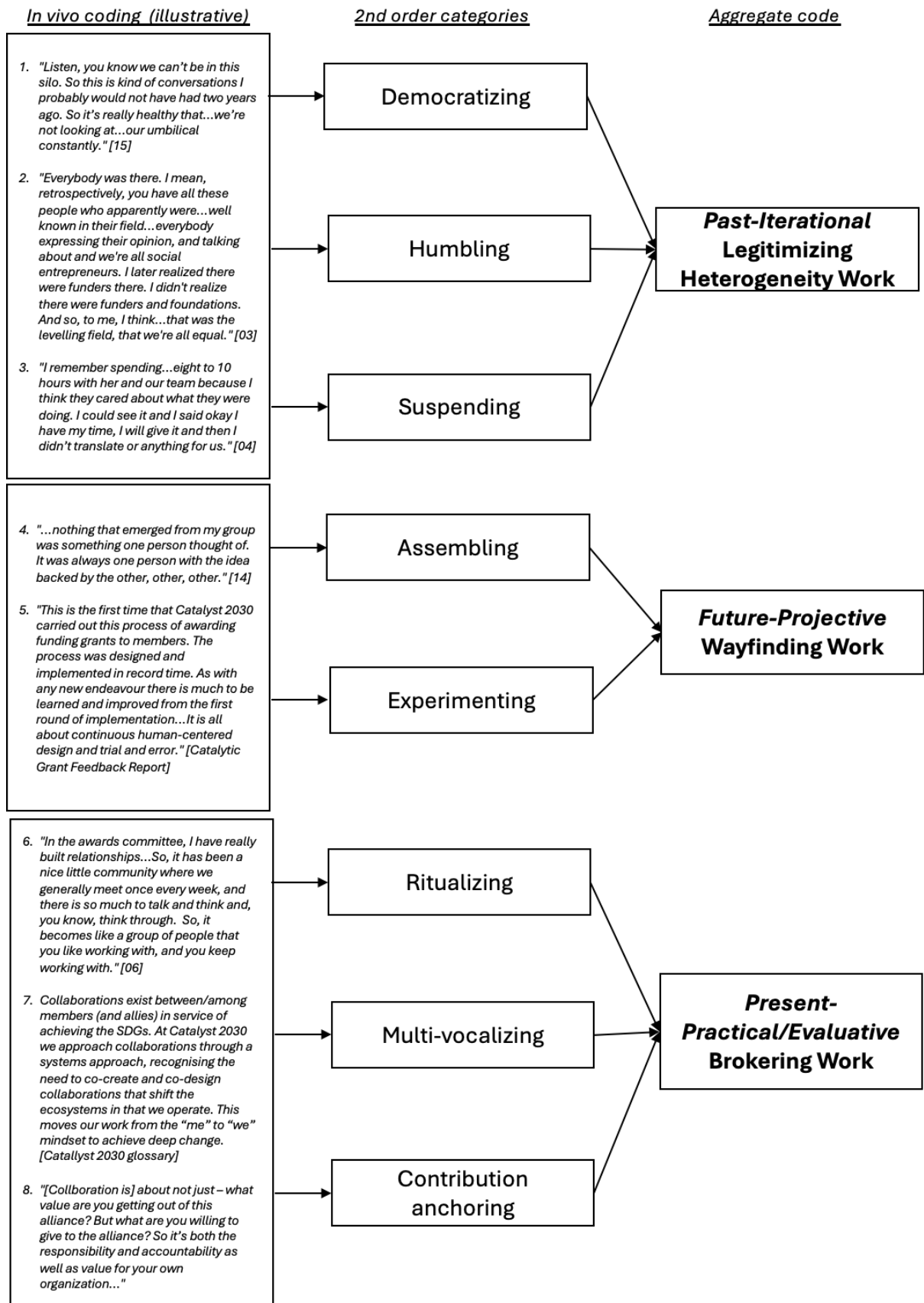


Figure 7: Coding Structure—Relational Work



Stage 3: Triangulation

Once the text coding was complete, I embarked on a third phase of analysis which involved comparing the first- and second-order coding scheme with archival data and observation notes. During this phase, I relied heavily on a vast archive of meeting minutes maintained by Catalyst 2030, alongside supporting documentation and videos. I reviewed the meeting minutes and observation notes in detail, looking for specific instances and examples of the experience sets, expectations and relational practices that had been identified in the interview coding effort. I also looked for outliers or examples where the materials revealed potential themes that did not correspond with the interviews. These instances were crucial to understanding the deeper experiences of participants and provide nuance to the patterns and themes that were more superficially represented in the formal interview phase. When examples were identified, I then dove more deeply into the presentation slides and video recordings associated with the meeting to identify granular detail about how the practice unfolded in that particular instance. I also used my observation notes during this phase to recall instances in meetings where these themes and patterns were in evidence or when the ‘mood in the room’ or notes from informal conversations did not match the more idealistic or surface-level notions of collaboration that participants spoke about in ‘official’ settings. Through this process, I was able to utilize the reflections and observations by members in interviews to pinpoint relevant activities and moments in the three-year archive and the two-year observation period. By using these three data sources (interviews, observation field notes and archives) in tandem, I was also able to discern more clearly the meaning and significance of specific practices and the ways in which they were used in the network’s historical record. This triangulation phase was critical to ensuring that the analysis was robust and providing richer detail and nuance in the analysis and description of the three categories identified in the textual coding stage.

4. The Study Site

In this chapter, I will provide a rich description of the single case study that I selected. It is important to note that heterogeneous collectives are difficult to reduce to a single unit of analysis. As noted in the previous chapter, collectives that exhibit multiple dimensions of heterogeneity are, by nature, aggregated units comprised of multiple subjectivities that cannot be reduced to a simple summation of actor experiences, expectations and practices. Rather, for this type of study, the unit of study (the collective) is the patterning that emerges as organizations and individuals participating in the collective create intersubjectivities through their interactions and relationships.

Given these complexities, it was challenging to identify a suitable case study for the research. I was aided in this effort by a reference in Ferraro et al., (2015) to “participatory architectures”. According to Ferraro and colleagues, a participatory architecture (PA) is “a structure and rules of engagement that allow diverse and heterogeneous actors to interact constructively over prolonged timespans” (Ferraro et al., 2015, p. 373). Importantly, PAs are structures devised to sustain engagement “in a series of temporally and spatially interconnected events, thereby setting in motion an ongoing process” (Ferraro et al., 2015, p. 374) rather than reach consensus or shared standards. In fact, PAs will go to great lengths to devise elaborate organizational structures to “forestall disengagement” (Etzion & Ferraro, 2010; Ferraro et al., 2015, p. 374). By this definition, agreements on goals, projects and discrete outcomes are not a prerequisite. Based on this description, I was able to discern that identifying a network with features resembling a PA would lead me in the direction of finding an appropriate collective for the study.

During this time, I was introduced to a growing network of social purpose leaders called Catalyst 2030. Based on my initial review of the organization’s mission, purpose and membership composition, I recognized many of the parameters that met my research criteria

including several features of PAs. The network consisted of a large and heterogenous group of individuals and organizations dedicated to addressing arguably the largest GCs in the world, the Sustainable Development Goals (SDGs). It was comprised of members who were both in longstanding relationships as well as seeking new relationships within the network. Furthermore, the network featured evolving governance structures and engagement platforms that were “characterized by distributed authority, lateral accountability, mutual monitoring, and multiple justifications” (Callon et al., 2009; Ferraro et al., 2015, p. 374). Through these structures, members were actively seeking to collaborate and engage with one another over an indefinite period of time in order to better address the SDGs.

Fortuitously, I was invited to become part of the network through the founder of the network. She suggested that I apply for membership and observe the network over a year or more. I then proposed to conduct a series of individual interviews with a diverse subset of members to assemble themes of learning and development for the network. She and the interviewees agreed to the research and I was subsequently approved for membership. In the sections below, I will provide an extensive overview of the network in order to describe Catalyst 2030 provide the necessary context for the findings and discussion that follow.

4.1 History

Founded in 2019 by a group of approximately 50 self-described “social entrepreneurs and innovators” (Catalyst 2030, n.d.-e), Catalyst 2030 began as a series of conversations on a WhatsApp group started by an award-winning, serial social entrepreneur after meeting with several colleagues at the United Nations General Assembly (UNGA) in New York City. The initial members of the group were awardees of several global social entrepreneurship networks, namely Ashoka, Echoing Green, the Schwab Foundation for Social Entrepreneurship, and the Skoll Foundation. Many in the group had longstanding friendships

through these networks, forged at international conferences and network-hosted learning sessions over more than a decade. During an informal session at UNGA, the founding members discussed the competition for funding and lack of collaboration that existed in the social enterprise sector. Many of the members expressed concern that the existing networks that had brought them together were comprised of elite institutions and not close to the actual work of social change. Emboldened by the group's passion for addressing the SDGs and concern for the current state of the sector, the founding member initiated a WhatsApp group called 'The Movement'.

Over the remainder of 2019, the WhatsApp group grew to more than 200 individuals through existing networks. The group also hosted a series of Zoom calls where they discussed purpose and strategy. It is notable that the primary output of this period was the co-creation of a set of values that would guide the group. These values included: (1) people and nature at the center; (2) co-creative mindset; (3) collaborative leadership; (4) humble audacity; and (5) spirit of generosity. The group also decided upon an organizational name (Catalyst 2030) with a tagline ("Collaborating to achieve the SDGs"), and developed a brand identity and simple website that drew upon the color palette of the social entrepreneurship networks and terminology of the SDGs.

At the same time, the existing social entrepreneurship networks—now dubbed 'The Big 4' as a tongue-in-cheek reference to their elitism—joined formally as 'Ecosystem Partners'. The Schwab Foundation (embedded within the World Economic Forum (WEF)) signaled its support by offering to launch the movement at the 2020 WEF Annual Meeting, a yearly gathering in Davos-Klosters of the 'who's who' in business and political leadership. Following the launch, the members decided to host their first in-person convening. A member of the movement offered to host the group at their home in Northamptonshire, England, and members offered to cover their own travel costs to join the meeting. During the meeting, the

members formed working groups (WGs) by encouraging each other to join the WG that “gave them energy” (Field notes, November 2021). Facilitated by a prominent consultancy, the meeting proved to be a significant bonding experience and was regularly cited by members as a pivotal moment for the movement.

Despite the move toward greater formalization (branding, launch, working groups), the members felt ambivalent about setting up bureaucratic structures. They envisioned a structure that would be non-hierarchical and volunteer-led. However, they also decided that it was necessary to resource the movement in order to provide the growing membership with greater support. To attract donations, Catalyst 2030 needed to have nonprofit status and some sort of staffing. With these requirements, the members decided to create a small staff contingent (the Secretariat) and a flexible governance structure (the Incubation Board).

4.2 Staffing and Governance

Prior to the launch, Catalyst 2030 was supported by the two-member staff of the founding member’s family foundation. Following the decision to develop the Secretariat, Catalyst 2030 formally hired its first staff members, based in Amsterdam, The Netherlands. The founding member agreed to join the movement as its first leader. A small number of other roles were filled, including a fundraising lead, a membership lead and a systems learning lead. To remain true to its concept of a volunteer-led organization, the leader of the organization was called the ‘chief facilitator’ and staff members were called ‘facilitators’. Support roles were filled by coordinators and a revolving contingent of interns. Catalyst 2030 relied exclusively on donor funding to run its operations. At the time of writing, the annual budget of the organization was approximately EUR 3MM. Supporters included family and corporate foundations, including the Skoll Foundation, Mastercard Foundation, GHR, Chandler Foundation and Shockwave Foundation.

Staff members were required to sign the Catalyst 2030 Pledge, a statement comprising the values agreed to in the early months of movement building. Notably, Secretariat members were urged to play a “background role” in their engagement with members. Staff were discouraged from expressing opinions about strategic direction or operational decisions; instead, they were urged to be an “honest broker” by “overseeing the background activities and tasks that drive Catalyst 2030” (Catalyst 2030, n.d.-g). As of late 2023 when the study period concluded, the Secretariat consisted of approximately forty staff members, divided into seven units: membership, chapters, collaborations, systems change learning, communications, enabling environment (funding), and operations/finance.

To provide governance and fiduciary oversight, the members developed a hybrid approach. Members who volunteered to lead the WGs formed an initial “Incubation Board” and committed to guiding Catalyst 2030 for the first two years. In practice, this ensured that the board would be comprised of individuals who were active in the day-to-day work of the movement, while leaving open the possibility of a more formal board when the organization had gained its footing. Over time, however, as WGs formed and disbanded, this meant that board membership morphed and changed, with some members remaining active and others taking a more passive role. At the same time, the members knew that attracting significant funding required more robust fiduciary oversight. Therefore, the members appointed fiduciary sponsors in the regions where they would be doing most of their fundraising.

4.3 Membership

Catalyst 2030 was comprised of both individuals and organizational entities, with members selecting either individual or organizational membership. When individuals applied, they were asked to associate with an organization, allowing them to participate both as professionals and as organizational representatives. When I collected data in December 2022,

Catalyst 2030 numbered 2130 individual members and 1700 organizational members. As of writing in December 2023, the network had grown to 4204 individual members affiliated with 2737 member organizations. Members represented heterogeneity on a number of levels, including geography (134 countries), issue focus (all 17 SDGs represented) and organizational form (members identify as one of nine stakeholder groups: social enterprise, civil society, academic, private sector, funder, media, government, intermediary and coalition/network).

The membership application process consisted of five steps: interest, application, selection, onboarding and engagement. I personally went through the application process in order to understand the details of the steps. First, I reviewed the membership benefits and application guidelines to ensure that the network was a good fit. Next, I filled out a simple online application form. I was interested to see that the application is provided in five languages to allow for inclusivity and diversity. I also noted that the application prompted prospective members to reflect upon the voluntary contributions that they will be making to the network selected. Upon submission of the application form, I was informed about my successful selection via email and invited to attend an online ‘induction session’ in the coming weeks. Upon attending the induction session, prospective members were considered to be full and active members. Members were then invited to register for the online engagement platform and join chapters, working groups and engagement sessions. It was through these activities and sub-groups that Catalyst 2030 members were encouraged to become an active part of the network and make a contribution through a variety of activities and sub-groupings.

4.4 Activities

Catalyst 2030 engaged its members through a number of activities. These activities

consisted of regular engagement sessions, annual events, initiatives and partnerships, and publications. The network conducted the majority of its activities online but it also offered in-person events through its regional and country chapters (described in the next section).

Catalyst 2030 aimed for maximum participation numbers and spent a considerable amount of time and energy deploying various methods to make global participation possible, such as online transcription to ensure multi-lingual delivery and abridged/recorded versions of events for time zones in the Asia Pacific region.

Engagement Sessions

General Assemblies: The primary engagement activity for Catalyst 2030 members was the monthly General Assembly (GA). The GA was a 90-minute meeting to provide updates on the initiatives underway and to showcase new members and engagement opportunities. GAs typically drew 100-200 participants from across the globe and were co-moderated by self-nominated Catalyst 2030 members. The agenda was developed well in advance and presenters were typically given two to three minutes for each agenda item. Moderators were in charge of keeping presenters to time and moving the agenda along. Discussion was conducted in break-out rooms with Secretariat members taking notes. While decisions were not taken in the GA, there was a strong emphasis on gathering feedback and sharing information. As one member described, “I think the general assembly meetings are fascinating...There’s a significant diversity of who presents and I am [sure] the curation is no small bit of work. And they do a very good job of enabling multiple voices to be heard...I think just having that platform and structure as a way to have people experience members of the network has an enabling value.” [17]

Network and connection opportunities: Catalyst 2030 also offered regular network and connection opportunities to develop more awareness and relationships amongst members.

Some of these opportunities included Conversation Cafes (virtual meetings around a specific topic), One-on-One Calls (exploratory calls with the Secretariat membership team to explore opportunities and navigate the network), and Friday Gardens (a weekly session for bonding and wellbeing to share stories about achievements and challenges).

Peer Support: Catalyst 2030 offered a peer connection programme called the Buddy System. According to the website, “This system fosters a unique relationship between two Catalyst members, in which they share their experience, provide inspiration and encouragement, helping each other find a way to achieve objectives inside Catalyst 2030, and facilitates access to resources that may be helpful” (Catalyst 2030, n.d.-b). Catalyst 2030 members were paired - usually a new member paired with a longstanding member - for four months and were expected to connect for eight hours in total over the duration of the programme.

Annual Events

Catalyst 2030 hosted two annual ‘flagship’ events. Similar to the GAs, these events were designed to encourage maximum participation and were overseen by diverse committees comprised of members. Although administrative support was provided by the Secretariat, committee leadership was on a voluntary basis and could take a significant amount of time and energy over the course of the year.

Catalyst 2030 Awards: Catalyst 2030 hosted an annual Awards celebration to “accelerate collaborative systems change by celebrating individuals and organizations that make it possible.” (Catalyst 2030, n.d.-a). Awards were delivered in four categories: Governments, Corporates, Bilaterals & Multilaterals, and Donors. Anybody (not just Catalyst 2030 members) could nominate potential awardees and nominations were shortlisted by the Catalyst 2030 Awards committee. The finalists were then judged by a jury of prominent

social purpose leaders chosen by the Awards committee. An awards ceremony was hosted at Althorp House in Northamptonshire, England and broadcast virtually to announce and celebrate the winners.

Catalysing Change Week: Catalyst 2030 also hosted an annual hybrid (virtual and in-person) conference called Catalysing Change Week (CCW) that brought together thousands of social purpose leaders and organizations, dubbed “the world’s largest event led by social innovators and entrepreneurs to share knowledge, exchange ideas and accelerate collaborative systems change” (Catalyst 2030, n.d.-c). The event consisted of more than 200 sessions, typically in presentation, panel or workshop formats. Catalyst 2030 did not directly develop the majority of the sessions, but rather maximized participation and diversity. Catalyst 2030 members were encouraged to develop their own sessions and host them locally (to be broadcasted globally), while the CCW Committee developed sessions with high profile global leaders. In 2022, CCW highlighted sessions such as “Water, A Rising Tide on the Global Agenda”, “Pave the Way for Youth”, “Africa Forward” and “Climate Actions and Solutions”. It also featured conversations with Paul Polman, the former CEO of Unilever, and Richard Edelman, a public relations guru (Catalyst 2030, n.d.-h).

Initiatives & Partnerships

Catalyst 2030 also partnered with existing initiatives in the social entrepreneurship sector to provide additional services and support to members. These initiatives were typically hosted outside of Catalyst 2030 but used the membership audience to grow participation and engagement.

Tendrel: Tendrel was founded by several leading social entrepreneurs who were members of Catalyst 2030. It is a global community of social entrepreneurs who meet regularly in “Forums” comprised of six to nine members and led by one or two moderators.

Moderators were trained in the Young President’s Organization (YPO) methodology on how to conduct a peer support group. Tendrel Forums met regularly in a confidential manner in order to share their experiences in a safe setting.

Elders Council: The Elders Council was also founded by several leading social entrepreneurs who are members of Catalyst 2030 and have transitioned out of the leadership positions in their organizations. The Council helped “veteran changemakers” to transition from founding organizations to sharing their legacy and experiences with a new generation of social entrepreneurs. They hosted webinars, “soul sessions”, events and webinars that were designed to assist with succession planning, legacy building and board development (Catalyst 2030, n.d.-d).

Systems Change Learning: The Systems Change Learning team was hosted within Catalyst 2030 and sought to connect educators and academics focused on social innovation with social entrepreneurs. The team ran two initiatives: the Systems Change Learning Series and the Social Change Innovators online platform. The learning series hosted webinars and masterclasses focused on topics and skills that were helpful to social entrepreneurs. The online platform was a collaboration between Social Change Innovators (founded in 2003 by the Entrepreneurship for the Public Good programme at Berea College, led by the current Systems Change Learning lead at Catalyst 2030) and Catalyst 2030. It was an open source compilation of more than 1500 resources on topics that were pertinent to social changemakers.

Publications

Catalyst 2030 also initiated and contributed to a number of publications that focused on systems change and social entrepreneurship. Examples of recent reports included “New Allies: How INGOs and Social Entrepreneurs Collaborate to Transform Global

Development”, “Pathways to Transforming Education: Proven Solutions from Social Entrepreneurs”, “Local Solutions from the Global South: Changing the Narrative of Climate Change”, and “Embracing Complexity: Towards a Shared Understanding of Funding Systems Change”. Developing and publishing reports were often the first activity that a sub-grouping (described below) would embark upon together. Through the process of articulating an issue of concern, identifying shared language and telling stories of positive solutions, members were able to learn to work together and build relationships.

4.5 Sub-Groupings

Over time, Catalyst 2030 developed a number of different sub-groupings which allowed members to organize into areas of interest and participation. Sub-groupings emerged organically based on needs from the network overall as well as the self-organizing of individual members. The types and terminology for these sub-groupings shifted over time as the movement grew and as the diversity of membership multiplied. Importantly, active and engaged members were typically engaged in more than one sub-grouping. For example, a member might be affiliated with a country chapter, a working group and a collaboration at the same time, creating a density of connections across the network. The constitution of sub-groupings shifted and changed: new members were encouraged to join meetings with a number of different groups before settling on the ones in which they remained active. Since sub-groupings were voluntary, members increased or decreased their engagement based on the time and energy they had available during time periods.

Sub-groupings were also the way by which Catalyst 2030 avoided overwhelming itself with bureaucracy. A member described: “I feel like they have demonstrated a way of working, that is equitable, both in its structure, and in its implementation...They're able to come together, share ideas, spark something new, put information out, promote a new way of

thinking, act on a project, fundraise, you know, sort of all these things happening because of the collaboration, where one would think it would die under its weight. And so far, it hasn't.”
[24]

Working Groups, Issue-Based Groups and Task Forces

The first type of sub-groupings to emerge were the Working Groups (WG). When the founding members of Catalyst 2030 convened for their first in-person gathering in 2020, they organized themselves into WGs and encouraged each other to join a WG based on where their “energy” took them. The initial set of WGs was developed based on movement needs, such as Communications, Membership and Fundraising. Following the 2020 in-person gathering, the number of WGs proliferated, growing to 15 WGs by early 2021. WGs also began to form around issue areas, learning topics and ‘pet projects’. To distinguish these groups from the WGs, the Incubation Board introduced a new term (Issue Based Groups, or IBGs) to describe sub-groupings focused on topics rather than movement building. By mid 2021, there were 12 IBGs in addition to the WGs. At the 2021 in-person meeting, members expressed concern and confusion about the number of WGs and IBGs. They decided to exclusively use the WG label to describe movement building activities that benefit the entire Catalyst community. Around the same time, the term IBG was abandoned in favor of Collaborations (see below) and the term Task Forces was adopted to describe internal committees devoted to events and publications. As of this writing, there are eight WGs (Communications, Selection & Onboarding, Systems Change Learning, Tendrel, Engaging the Private Sector, Donors, Impact Assessment and Bonding & Wellbeing) and five Task Forces (Catalysing Change Week, People’s Report, Catalyst 2030 Awards, Theory of Change and Catalyst Market).

Collaborations

Another set of sub-groupings to develop within Catalyst 2030 were collaborations. Collaborations were groups that form to pursue collective action amongst social entrepreneurs and, often, with additional stakeholders, including donors/funders, the private sector and government. These sub-groupings were both global and regional in scope, and typically focused on a subset of the SDGs. A sampling of collaborations included Africa Forward (a collaborative focusing on African-led solutions); Catalyst Hub (a collaborative to build a pipeline of systems-level initiatives ready for funding); the India Education Collaborative (a collaborative for social entrepreneurs addressing education issues in India); the Social Justice Index (a collaborative developing a measurement tool for social justice within organizations); and the Sustainable Menstruation Coalition (a coalition of organizations dedicated to distributing and educating about hygienic and sustainable menstruation). As of writing, there were 106 collaborations listed on the Catalyst website.

Regional and country chapters

A third set of sub-groupings based on geographical affiliations emerged in the Catalyst network at about the one year mark. This emergence was turbulent: members from one of the larger geographies began to organize themselves into a geographic group and announced that they had made the decision to use a non-affiliated name and branding. After significant negotiation, the geography's leaders agreed to call themselves a Catalyst "country chapter" rather than adopt a new name. Eventually, the geography's leaders also agreed to use the Catalyst logo and branding. Based on this experience, Catalyst 2030's leadership realized that regional and country chapters were a likely and important development and decided to invite active members in each geographic area to organize a chapter.

The development of geographic chapters constituted a new and important stage for

Catalyst 2030, coinciding with significant membership growth and a growing conversation about the importance of local environments. As one member described in early 2022: “My guess is that the local or regional chapter model is going to turn out to be super important...[social innovation] requires their local enabling environments to work, right, like the culture of philanthropy, the regulatory environment...So my sense is that if you get the substrate right, it allows these folks to be more successful. And through social innovation, it could be that a local regional approach is going to turn out to be best...” [35]

Geographic sub-groupings became an important way of mobilizing members and carrying out network activities. New members were often introduced to Catalyst 2030 through the country and regional chapters. Furthermore, activities were increasingly conducted through chapter organizers and flagship activities often had a regional or country-level component (such as local CCW events). As of August 2023, Catalyst 2030 had six regional chapters and twenty-three country chapters.

5. Findings 1—Experiencing a Grand Challenge

In order to understand how heterogeneous organizational actors come together to pursue institutional work, it is important to bring in rich descriptions of the ways in which institutions are experienced by these actors (Creed et al., 2014; Lawrence et al., 2011). Yet, the institutional literature is surprisingly vague on what constitutes experience (Gehman, 2020). Consequently, the ways in which scholarship should collect, distill, and convey institutional experience remain unclear. In this chapter, I will aim to convey some of the ways in which the members of Catalyst 2030 experienced GCs, given their complexity, uncertainty, and evaluativity, and answering the first research question:

- How do heterogeneous organizational actors experience issue-based institutional

fields, such as GCs, in light of their characteristics of complexity, uncertainty and evaluativity?

In order to do this, I will first parse the components of experience and propose the concept of *experience sets* as a way to convey the multi-faceted nature of members' experiences of GCs. I will then describe three distinct experience sets that were revealed by members of Catalyst 2030 during the study period.

5.1 Studying Experience

Experiences are subjective and contextual (Nilsson, 2015) and they are produced at multiple layers and levels, both consciously and unconsciously (Vince, 2014). They are formed in discursive acts, such as narrative (Lawrence & Maitlis, 2012), and are often in a state of continuous construction, reconstruction, and meaning-making (Czarniawska, 1998). Importantly, institutions are experienced in social interactions and these “ongoing interactions forge the connections that provide the supple, durable quality of institutions.” (Hallett & Ventresca, 2006, p. 226). The interviews with Catalyst 2030 members provided a unique opportunity to study a group of organizational actors narrating and introspecting their experiences of interacting and forming relationships within the context of addressing GCs. Given that experiences are subjective, yet relate to the way an individual processes the “soil” of institutions (Gehman, 2020, p. 241), I anticipated that I would uncover experiences of GCs within Catalyst 2030 members' stories of their individual and organizational journeys, with particular attention to their interactions and relationships with others who were operating in the issue-based institutional field of the SDGs. Therefore, the experiences that are related in this study are individually imparted, but organizationally and collectively construed. The patterning of experiences is discovered by mapping the contours and commonalities revealed in the individual stories as told by actors who, when relating their personal experience, are, in

fact, representing all three of these layers.

The individual interviews proved to be most useful in understanding the experiences of GCs. Members of Catalyst 2030 have typically dedicated their lives to addressing GCs, and their life experiences reflect knowledge gained over years, even decades, of action and reflection. Several questions in the semi-structured interview protocol were, therefore, relevant to gathering members' experience of GCs. Early in the interview, I asked the question "What motivated you to join Catalyst 2030?". This question usually elicited a biographical account of the member's career journey, often highly personal rather than organizational, arriving at the point of joining the network. I mined these answers to identify stories that revealed experiences of GCs in the time period prior to being part of Catalyst 2030. Another relevant interview question was "What relationships have you formed in Catalyst 2030 and how have these differed from relationships outside of the network?" Similarly, this question often brought up stories of interactions that were representative of the relationships formed while working within GCs, both within Catalyst 2030 and outside. A third revealing question was "How have collaborations within Catalyst 2030 been similar or different than other collaborations you have been involved in?" This question allowed members to compare and contrast their experiences both inside and outside of the network, digging deeper into the experiences that characterized GCs and their work both with and apart from Catalyst 2030.

For these findings, I looked for patterns and common sentiments that were expressed by participants in their descriptions of the period leading up to and just after joining Catalyst 2030. The aim here was to understand the experiences of an issue-based institutional field surrounding the SDGs—specifically, what experiences of GCs might lead organizational actors to decide to organize collectively with diverse actors? Therefore, I did not choose to highlight *all* experiences, but rather the selected experiences which were linked to the reasons

for joining and being part of the network. In this way, the analysis included a temporal aspect linking Research Question 1 and Research Question 2, which allowed me to use these depictions later as I explored the impetus for members joining Catalyst 2030 as well as the divergent expectations that arose during the process of initiating—and ultimately sustaining—engagement in the network over a period of time.

As I analyzed the interview transcripts, I began to break down the constituent parts of experience that I was finding in these narrative constructions within the interviews. First, I encountered direct knowledge that members had gained by observing, perceiving, and undertaking action within the circumstances of GCs. I often heard ways in which members described the settings in which they were working, the perceptions of the relationships and interconnected parts, and the struggles and strategies that they found along the way. I coded these types of observations as *perceptions*. Second, I noticed sensibilities—emotions, attitudes and feelings—that were detected or inferred during these explanations and stories. In many cases, these emotions would be acknowledged outright, but in other cases, they were assessed from the tone of voice, speed of speech, or forcefulness of language of the interviewee. I coded these observations as *emotions*. Finally, I heard the desires and motivations that arose during this interplay between knowledge acquisition and emotions. These were often interspersed in the storytelling, creating contrast between the current imperfect state and the hopes for Catalyst 2030 and what the network might achieve together. I coded these accounts as *desires*.

By breaking down experience into separate components, I began to get a more nuanced picture of how Catalyst 2030 members were experiencing GCs. Not surprisingly, every member had a slightly different set of experiential components but there were patterns across the sets. For example, perceptions could be interrelated, but result in different emotions and desires. Similarly, an emotion could be equivalent (ie, frustration) but stem from a different

perception of the experience (ie, fragmentation caused by sectoral silo'ing or fragmentation caused by exclusivity). This richness and diversity of experience created a layering and overlapping effect, which was drawn upon when forging connections between fellow members, as I will describe in subsequent chapters. More immediately, in the section that follows, I will use these three components—perceptions, emotions and desires—to describe the 'experience sets' that were held by members of Catalyst 2030 when operating in the context of GCs.

5.2 Experience Sets Within Grand Challenges

In this section, I describe the *experience sets* (perceptions-emotions-desires) that reveal the ways in which Catalyst 2030 members cognitively and emotionally perceived the issue-based institutional field of the SDGs, a set of GCs. Within the interview data, I identified three experience sets: *fragmentation*, *time precarity*, and *path ambiguity*. All three experience sets are interaction based in that they reveal the ways in which Catalyst 2030 members perceived, felt, and hoped in relation to other actors within the institutional field prior to and during the formation of the network. The first experience set, *fragmentation*, reveals the sense of disconnection that members feel in relation to other members in the context of GCs. The second experience set, *time precarity*, reflects the insecurity and uncertainty that members feel in relation to time when addressing GCs. And the third and final experience set, *path ambiguity*, describes a paradoxical sense of 'unknowing' that results from significant time spent with others in GCs. Tables 7-9 summarize these experience sets and provide the key words, perceptions, emotions and desires that characterize these sets as identified in the member interviews and augmented with observation data. It is important to note that participants generally held certain aspects of all three experience sets, some which even appeared contradictory in nature. While it was unclear from the study whether certain aspects

of experience sets led to greater or less engagement, it appears likely that the combination of the three experience sets reinforced the impetus for collective engagement, explored more fully in Chapter 6.

5.3 Experience Set 1: Fragmentation

In one interview, I spoke with a veteran social entrepreneur who had founded multiple organizations and spearheaded numerous campaigns to alleviate one of the most persistent global GCs: poverty. This entrepreneur was highly active in the process to develop the SDGs and had interacted with a diverse set of leaders in multiple sectors over decades. More recently, they had broadened their focus to include issues of climate change, which they saw as interrelated with addressing poverty. Speaking quickly and matter-of-factly, they described one of their biggest frustrations:

“So basically the climate people and development people aren’t talking to each other and that’s the essential problem for the SDGs. We need to address that by finding places and actions for climate [and] development people could do together. But also even if climate wasn’t a carbuncle sort of off by itself a bit. the SDGs are not delivering as one, there aren’t tools or networks yet that are effective across them. It’s just a long list, a long and difficult list as opposed to a series of efficiency gains. We need to convert them from a long and difficult list to a series of efficiency gains by, if you do this you can also succeed on this, this and this as opposed to here’s a long list of things you have to do.” [19]

The experience set that this member describes is *fragmentation*. In the interviews, this experience set was marked by key words such as “adversarial”, “balkanized”, “lonely”, “political” and “self-preservation”. *Fragmentation* describes the sensation of being broken into small parts, which seemed to encapsulate the experience that members conveyed. Since GCs involve a “large array of actors” (Ferraro et al., 2015, p. 365) who operate with multiple institutional logics that are incompatible and contradictory (Greenwood et al., 2011), this experience set at first seemed obvious. However, fragmentation was perceived in different ways and resulted in various emotions and desires by members. Emotions associated with

this experience set were frustration, cautiousness, overwhelm, loneliness, and anger. While participants often spoke with these negative emotions, they were also touched with hopefulness: while the GCs present a fragmentation, they hold open the possibility for connection, wholeness, and coherence. Fragmentation was therefore linked to the expectation that there is a ‘whole’ that is possible and desirable, yet currently out of reach. For many members of Catalyst 2030, the disconnect between the current fragmented experience held open the possibility and desire for a future of connection and coherence.

In some cases, such as the entrepreneur above, this experience set was marked by the perception that actors and organizations operating within a GC were disconnected from one another and that information was not effectively being shared or disseminated. Members described situations where organizations or sectors were isolated from one another, and therefore missing important connections, information or strategies. Members would often use metaphors to describe these situations—phrases and words such as “siloes”, “not talking to each other”, “carbuncle”, “sticking to our own knitting”—revealing a difficulty in expressing the true nature of the experience.

One member with a long career in the social justice sector spoke heatedly, revealing a sense of astonishment that the organization they belonged to had been disconnected from their peer organizations for so long:

“So we all have our own work, we're all sticking to our own knitting. But you know, you are required to lift your head up and engage outside of your own four walls...you know, this is the first time in my 20 plus years at [organization] that I have consistently worked with my fellow [industry] folks, right? Like, I always found it ridiculous that, you know, I never spent any time with the [peer organization] folks or the [peer organization] folks or the [peer organization] - like nonsense, just nonsense.” [35]

While members expressed concern about lack of effectiveness due to fragmentation, a more common concern was the emotional aspects of fragmentation. Several members spoke about the loneliness and isolation that they felt when working in GCs:

“social entrepreneurs can feel very isolated in the work that they’re doing” [17]

“people were working in silos and it was very lonely...there wasn’t a collective and unifying body to bring together a collective...to try and tackle some of the big issues” [11]

“many social entrepreneurs are really siloed now” [12]

“sometimes they say social entrepreneurs are always in a very lonely space, the journey could be very lonely, you can be very depressed” [14]

“So I get a sense that some social entrepreneurs, they are lonely.” [18]

Other members perceived fragmentation less as a disconnect and more as a ‘fight’ between sides that were in competition with one another. Some members perceived fragmentation in adversarial or political terms. These participants described situations where they felt confrontation or barriers to connecting across organizations or sectors. For some of these participants, the feelings that these experiences brought up was frustration, and in others, it was anger and confrontation. Participants described situations where there were impasses and ego’s: “So I sat across from donors [and] all they heard was okay, social justice person, you’re telling me that I have to lose for you to win and conversation stopped over, nothing moving forward.” [35] and “There is a lot of...ego’s, lots of communication difficulties and when you are crossing borders and cultures and language barriers, it gets tougher. It gets geometrically tougher right?” [01]

In one candid conversation, a participant described a particularly powerful actor group within the GC, using phrases that conjured up a fight or competition:

“...so seeing them as they’re fundamentally bridging to local and they’re bridging to global, and the ability to actually get this feedback loop going, is where they can be really powerful. But self preservation is getting in the way, of course. And we just kind of keep throwing that back at them. So is this about self preservation? Are you really about change? And, you know, it’s, it takes a lot of work to push through.” [24]

Another member described the redundancy of efforts that they felt were caused by competition:

“I...was working in an NGO until 2016 and I...I stepped out because I felt that we were doing the same. Many NGOs were doing the same, and this is in the area of youth empowerment and I remember at one time trying to bring people together, in the same space, saying let’s talk, let’s see how we can proceed together instead of everybody doing more or less the same thing. And it was very difficult because I realized that everybody was guarding their networks, their partners very closely to their chest.” [08]

When participants described these scenarios, they were marked by a sense of frustration, akin to exasperation, almost like watching someone solving a puzzle and not being able to put two connecting pieces together. Sometimes, the tone of voice when describing these situations was tense and anxious; in other cases, the member sounded bemused or cynical.

Still other members perceived fragmentation as lack of inclusion of more marginalized groups, geographies and cultures. In these cases, fragmentation was not a disconnect between organizations and sectors, but rather a lack of inclusion of cultural differences, languages and systems of knowledge. One participant of indigenous background described the feelings of cautiousness that they and members of their community have felt because they weren’t certain whether their contributions would be welcomed:

“...we tend to get lost in our own work and this is where I took the last six, eight months where I didn't try to push [my organization] onto anyone or anything because I needed to listen, I needed to learn, I needed to research. I needed to ask questions. I needed to try to contribute to the questions to give me the balance of understanding...indigenous innovation, the globe has been doing it for nearly 20,000 years you know. And so there are some meaningful groups across the whole globe but because the way the world was constructed, when I talked about [indigenous innovation] it was never allowed to come out. And now...they’re still a bit cautious because everyone's been hit in certain ways of whether it be colonization or it be process stopping, or it be feeling not heard...all these aspects.” [05]

Another participant described the disconnection between individuals that can arise due to language and terminology:

“The first time I joined being a white only group, I felt a bit out of [laughs] I felt too dark [laughs]. But...there was a language...some terminologies were new for me, because of being a – you know I mean every group has got its own terminologies but fortunately for me I am a bit, what I can I say, I am old enough to ask what does that mean and not feel shy about it...but I came to realize if it had been somebody who has a different exposure, they may have just left...they think they don’t understand because they are not exposed or learned enough and then they leave. They feel uncomfortable and leave. That you know happens all the time, in such a mixed group...” [08]

For participants, this inability to connect across barriers was described as lonely, uncomfortable or a cause for caution. In spite of these emotions, this disconnect was also a strong motivator, providing purpose and a role for those who identified with more marginalized groups. A social purpose leader from Africa described their sense of commitment to participating in Catalyst 2030 as a means of rectifying historical exclusion:

“...the voices that are strong from Catalyst it’s like Europe, America and India...there’s not much of a voice for Africa. There’s no voice for Africa and Africa cannot be left behind...I need to be also involved in shaping that kind of discussion from [the] point of view of Africa now...it’s so important to understand who we are and where we are and also with our levels of engagement...this is a [region] that has been exploited to an extent that it needed to be developed around that.” [18]

Fragmentation was viewed overall by interviewees as a significant constraint to addressing the SDGs. While the experience of fragmentation brought up emotions such as frustration, loneliness and anger, it was also identified with a sense of hopefulness. Participants seemed to view the sensations of fragmentation that they were experiencing as an undesirable yet ‘fixable’ state. Even in situations where the participants expressed resignation (“I had absolutely no faith that social entrepreneurs could collaborate. I had never observed it...” [02]), this then led to a search for possible avenues to alleviate the fragmentation. For example, fragmentation might set off a bout of learning and research, or it might act as a driver to find ways to connect people and organizations, as one member described:

“And, you know, that was very exciting process, we were just social entrepreneurs talking about working together and collaborate. And normally, that happens before in environments

that were created or controlled by a funder or other allies, you know, other networks at Ashoka, or Skoll, or Schwab....” [42]

In several instances, this hopefulness for connection and wholeness was described as something “bigger”, such as the sensation of “people seeing something bigger than themselves” [02], a “bigger vision” [22], and “this is about something bigger”. These desires were described in almost mythical terms and associated with a vision for the world that was more coherent because of the interconnections that had been forged. Ultimately, it seemed important to members that this desirable state was just out of reach, but still attainable. This drive to connect and achieve coherence was a strong motivator for many to join the network and put serious effort into its development. As one member described it: “...why did I get involved?...There seemed to be a genuine drive to collaboration and to addressing something bigger than any one organization is able to do on their own.” [41]

Figure 8: Experience Sets Within Grand Challenges - Fragmentation

Experience Set	Conceptual Categories	Second order codes	First order codes (illustrative)
Fragmentation	Perceptions	Disconnection, lack of communication	Disaggregated Balkanized Lack of connections between funders and doers Disillusioned with project approach Siloed Sticking to our own knitting
		Lack of inclusion and belonging; suppression of cultures and voices	Colonization I felt too dark Cultural barriers Process stopping No voice for Africa
		Competition	Adversarial Logos and egos Terrible at collaboration Political Self-preservation
	Emotions	Loneliness	Lonely Isolated The journey could be very lonely, you can be very depressed
		Frustration	It takes a lot of work to push through Ridiculous...nonsense Not very functional relationships
		Caution	Guarding They feel uncomfortable and leave Cautious, not heard
	Desires	Connection	Finding places for people to do together Lift your head up and engage
		Wholeness and coherence	A collective and unifying body Seeing something bigger than themselves This is about something bigger Very exciting process...to create something all together

5.4 Experience Set 2: Time Precarity

In another interview, I had a conversation with a social entrepreneur who had a celebrated career in technology before making a pivot to the social sector. Now they are the founder of an organization that works on population level social outcomes. In our discussion, they vacillated between the desire for concrete answers to issues of health, education and poverty while also reflecting on the philosophical nature of the work of social change. Early in the interview, they reflected on a project for Catalyst 2030, saying:

“I had to spend a lot of time thinking about these things before I could deliver anything and all people saw was a document. But hours and hours of discussion and thought process [were required] before I could come up with anything. So it was eating perceived productive time and [we] would always fool ourselves [that] I had something important to do and this was coming in the way of it.” [04]

This entrepreneur’s concern about the hours of time spent on “discussion” and “thought

process” is indicative of the second experience set that I will describe, *time precarity*. In the interviews, this experience set was marked by key words such as “time”, “busy”, “urgency”, “accelerate” and “priorities”. I chose the word *precarity* to encapsulate the lack of predictability and uncertainty that members felt about time in relation to the GCs that they were trying to solve. In some cases, time precarity was experienced as urgency, or the need for swift prioritization, action, and resolution. In these circumstances, time created the emotional qualities of persistence and earnestness, creating a craving to do something—anything—to relieve the GC. It also carried the sense of important-ness and graveness, sensations which seemed to ‘crowd out’ the ability to focus on or elevate other experiences. In other cases, time precarity was experienced as an ambivalence about time, with a contradictory acknowledgement that time was scarce, but that addressing a GC would take significant time and that patience was needed. This ambivalence was often paired with an anxiety or nervousness about how time was being spent, or a desire for others to slow down. While addressing a GC, members associated time precarity with the emotions of being conflicted, weariness and fear. These emotions were often coupled with a sense of letting others down or failure.

In several interviews, participants expressed time precarity as a concern about conflicting priorities. Like the member above’s experience, this conflict was often presented as a heightened awareness about what activities they should be spending time on, or that the need to justify the time that they were spending on certain types of activities. For example, a member reflected on their early impressions of Catalyst 2030:

“I wonder to which extent...all this seems to take quite a bit of resource in terms of human time in terms of human energy, in terms of there must be some money and the question is, is it worth it?...is that a very inefficient use of people’s time?...it might all be great and it might all be important but it doesn’t mean that something is actually changing in the world beyond this community. And I’m a very big skeptic about you know, I do think people have an amazing ability to keep themselves busy.” [16]

Members with this perception often saw time as scarce, expressing frustration when putting significant time into an effort or fear that their time would be wasted. One member delved into their concern that collaboration could result in wasted time, saying:

“And what I am keen to do is foster collaboration but really effective collaboration ...there is so much bullshit in the air of collaboration coordination and I have seen it, and I have had my time wasted for it. So I am not one of those people, I like to sort of get things done. I also really like speaking collaboratively when you can. And I have been part of major global coalitions that were really hard to build and had my heart broken when those fell apart. So you know I have been around the block on those question of collaboration particularly when it comes to advocacy and I think it probably is different because it is more political advocacy so then tend to burn brightly and then burn out.” [19]

And later in the interview:

“ I find a lot of the meetings are not good uses of my time. You know amongst the worst uses of my time. So I simply can't afford to go to them. So I sort of got this arrangement ...you tell me what the most high impact sixty minutes I can do [this] week...because I want to add value...But I don't want to be part of lots and lots of processes...I will occasionally...have time in my calendar and really enjoy it if I can...but not if it's a crunch time for other things that are going on.” [19]

Time precarity was often coupled with strong emotions and even aggression when it was perceived that time was not being used in the most productive way possible to address GCs.

A member described this tension present in collaborations where multiple perceptions of productive time were present:

“...from a collaboration perspective it's deeply challenging to bring all of those different players into the room together. Because you will have the “I want to get shit done” and you'll get the “I want to sit around and wax lyrical” and then you've got the combined...and then people wanting to kill each other, like literally. Then some people want to breathe and some people want to get stuff done and like, are you done breathing? You can have that in the same room.” [22]

While these divergent approaches to time could partly be ascribed to personality types or cultural differences, the uncertainty present in GCs seemed to be a persistent factor, causing some members to feel a great sense of urgency to jump into action and others the need to weigh all options carefully and spend time in community prior to taking action.

In some instances, time precarity was viewed as a dichotomy between members in the Global North versus the Global South. As one Latin American member expressed, “The available time in the South is different than the available time in the North. This could account for the different level of agency.” [Field notes, November 2021] Another member described the experience of new African regional participants, some of whom felt their time was being wasted due to excessive video chat meetings:

“Somebody came up and say that...they have been spending their bundles, attended meetings, they have spent their time attending meetings and they haven’t seen the impact on [their] work and so on and so forth. A lot of communication went to other people, came up and say, yes it is true, we don’t see what is happening, a lot of information...my view is that there are things need to be...a tweak in how we communicate to members from Africa...because for example bandwidth is very expensive in parts of Africa...I’m lucky I have my Wi-Fi right in my house I am sitting where I normally sit and I can have this conversation even in bed if I want to...but other people have to travel, even to another town, or to another person’s house or whatever to get this facility to be in a meeting.” [08]

Interestingly, in some interviews, participants seemed conscious that the feelings due to time precarity were ‘coloring’ their other experiences or preventing them from being most effective, yet it acted as a pervasive backdrop while operating within a GC. This created a surprising contradiction: while participants expressed awareness of the urgency of the problems to be solved, they often felt it was important to slow down and act in a non-hurried way. One member contrasted these seemingly contradictory experiences as “newness” and “steadiness” when describing a collaboration to vaccinate millions of people against COVID-19:

“[Members] want things to be done faster, quicker, better, cheaper all the time. But I think there is a soaking and comfort members need to get and certain amount of norming which need to happen...There has to be certain newness and there has to be certain steadiness...and these are [activities that] don’t go well with each other...In [a collaborative effort], we keep asking ourselves what is the member going to sit up and say, wow, I didn’t know that, I didn’t know we can do that. We need that, literally every fortnight, every week, every month. But at the same time there are certain things which are more medium to long term which are happening, which are substantial, which are significant, right? When took a pledge we will vaccinate ten million people, not any ordinary citizen, people who are poor, who live in the streets, who are hawkers, who are sex workers. Literally everybody laughed

at us. But we said, but we are going to take it one million at a time, one person at a time. We going to chip it, we [are] going to do it. And we reached eleven million in three months, right?" [01]

In another interview, a participant told a story about building a coalition and realizing that they weren't the person to lead the group due to their "great sense of urgency":

"I was like okay, we don't have time, there's an emergency, people are dying, but...I immediately gave the reins over to the most co-creative, collaborative woman I knew...and she nurtured the network phenomenally. Oh, she obviously made mistakes whatever, that's irrelevant but I still wouldn't trust my personality type to lead...the behaviour is around not being driven, you can't afford to be driven by a great sense of urgency. And I think there it is contradictory because you've got to solve problems...you cannot have a strong sense of urgency, any behaviour driven by urgency and the need to get things done fast, those are the old organizations, the hierarchy from the top down, we've got to get this done by tomorrow kind of thing. I don't think it works here, so to me that was a big behaviour change." [07]

While time precarity was a common theme, the different experiences and approaches to time meant that the desires of members in relation to time were divergent. While some members expressed a need to agree quickly to timeframes and processes, others sought patience, slowing down, and acknowledgement from their peers for the significant time that GCs required. These two desires were often in tension, sometimes between members and even within the actors themselves. As one member commented, "we can accelerate, or not accelerate, because I get a bit weary with you're trying to move, you know, the speed of light and then you're like why are we going at the speed of light when just walking is going to be sufficient for us?" [05] Regardless of the desired approach, members were united in being acutely attentive to time as a concept and pervasive factor in their work addressing GCs.

Figure 9: Experience Sets Within Grand Challenges – Time Precarity

Experience Set	Conceptual Categories	Second order codes	First order codes (illustrative)	
<i>Time Precarity</i>	Perceptions	Sense of urgency and conflicting priorities	Burn brightly and then burn out	
			Everyone is very busy; Just too damn busy	
			Is it worth it?	
				Short on time, short on energy
				Crunch time
				Imperative to streamline
				Eating productive time
				There's an emergency, people are dying
				Time scarcity
			Ambivalence about time	What have I got to lose
			It will take time	
			A soaking and comfort members need to get	
			Speed of light when walking is sufficient	
	Emotions	Conflicted	Too busy with other things	
			I'm a very big skeptic	
			Trying to be super disciplined	
			Some people want to breathe and some people want to get stuff done	
		Weariness	Had my heart broken	
			People say they're short on time...in reality they are short on energy	
			Weary	
		Fear	We have a risk...of slowing down	
			Desperate ends	
	Desires	Swift action	They need to set their priorities better	
			Members want things to be done faster, quicker, better, cheaper	
		Slow down	You can't afford to be driven by a great sense of urgency	
			Why are we going at the speed of light when just walking is sufficient	
			[Collaboration] is very big, and will take time	

5.5 Experience Set 3: Path Ambiguity

Another interview was with a member who is an engineer by training, applying their strong industry background to making value chains more inclusive and fair. They were well-respected within the network and it was clear that their ideas carried great weight amongst their fellow members, who often referred to this member in their interviews. With over two decades of experience in the sector, I expected them to speak authoritatively about the steps needed to address the GCs of poverty and climate. Instead, they spoke about the need to “put up with emerging situations”, saying:

“that piece sank in a lot, true seeing how things were done...and how they just emerged right...you will have to have the time and the patience to let things happen right...the ability to put up with emerging situations is something I have been able to build by watching the Catalyst in action, allowing things to be more emergent and...you can’t build a strategy before.” [07]

This member’s description represents the third experience set, *path ambiguity*. In the interviews, this experience set was marked by key words and phrases such as “no expectations”, “curiosity”, “open-mindedness” and “emergence”. I found this experience set to be particularly difficult to analyze, as these stories and anecdotes seemed to reflect an ‘absence’ of knowing. I was a bit flummoxed: if experience is usually represented by knowledge gained through exposure to contextual circumstances, why would a group of seasoned social purpose leaders be so uncertain about their knowledge base gleaned from decades of experience? This paradox caused me to delve into the data more deeply. Over the course of reviewing several interviews and comparing them to my observation notes, I began to suspect that operating in a GC over a period of time created a level of incertitude, encapsulated by the phrase attributed to Aristotle, ‘the more you know, the less you know’. I dubbed this experience of ‘unknowing’ *path ambiguity* since it described perceptions that led members to join Catalyst 2030 with a level of uncertainty about how to address GCs as well

as a curiosity and openness to new ideas and connections.

Many members recalled joining Catalyst 2030 with lack of expectations or the inability and unwillingness to predict an outcome for the network. This perception was often paired with curiosity, alertness and attentiveness, which was matched with a desire to learn and connect with others. As one accomplished member described:

“I think about a year and half, two years into our journey this seemed like a good thing to do. So I just went with that. I think in that sense just that the idea that I have no expectation made it easy because I was not looking for anything. I was just allowing it to happen as it went along and then I was trying to make myself useful. If something came along where I felt I could contribute I would just contribute, not overthink it but what I quickly realized and maybe sometimes in my gut I could sense that this has something in it that can - you know, that justifies my time and I started to realize that it’s just broad awareness.” [04]

Several members related their involvement to general intuition or positive ‘gut feelings’.

Referring back to the larger context of a quote from the previous section, one founding member described a similar lack of expectations and the desire to meet other experts in new fields:

“What did I expect to get out of it?...I’ll put it at lowest common denominator, what have I got to lose you know?...Talking to experts in their fields...for me was a no brainer...So you know and then there’s a trade off on time...Normally we’d go to conferences to listen, to hear and to meet and to interact and to learn. It’s like you go to a conference and you get ten business cards but you’ve had fifty interesting conversations that you can synthesize and bring to the rest of your organization. So I see at the very lowest common denominator about what I thought about this and so well let’s see what happens, but it feels good and it feels right. And it’s sufficiently outside of my comfort zone to feel that it’s time well spent.” [15]

When describing their expectations or lack thereof, members expressed emotions such as curiosity and enrichment. Listening to these descriptions, it was clear that members felt a sense of camaraderie in the journey of learning and exploration. For example, one member described the enjoyment of going beyond their “daily circle”, even when not knowing where the engagement would go:

“But [Catalyst 2030 members] were really taking two steps back and trying to look at the

big picture of how does systemic change happen. I find that very enriching because I hadn't had those kind of conversations anywhere else. I think part of what I really enjoyed and enjoy is that obviously a crowd of people who care about somewhat similar issues as I do. And it's always nice obviously to find your tribe... To kind of go a bit beyond your daily circle and to engage with what is in a sort of way my own tribe again. I found that really interesting... I am quite curious where it will go because I think the whole issue of social entrepreneur, systemic change, you know the stuff that seems to be at the core of this effort is I think incredibly relevant if you want to tackle some of the big changes that humanity is facing." [16]

Other members spoke about playfulness and fun, even when expectations were shifting and changing. One member talked about how their expectations had, in fact, **not** been met, yet this had been a "fun" experience:

"I know my expectations have not been met... But I have got involved in other things and it is a ton of fun, it is fun to be a part of this group... it is things that I have mulled over for many years, but have not been able to do..." [06]

When I asked this member to elaborate on why this was fun, they went on:

"It **is** fun... I mean, we are all very focused on our work the whole day. I am focused on my work, the work that my organization does, [while] this gives you a chance to actually sit back and look at the larger world of change making... your thinking gets strengthened by reacting and interacting with people from all over the world and you can sit back and see your work in perspective. In addition, there is a sense of belonging that you do belong to a community of people who are fantastic and will bring great work and you are sometimes surprised that you are part of that... So, it is a lot of positive feelings, it is a lot of fun feelings and it even for a moment, even for moments, it takes your attention away from the daily nitty-gritty of your work. That is the fun part." [06]

The lack of expectations held by many members was linked to a distaste for predetermined outcomes and the perception that too much structure would lead to disengagement or failure for the network. This perception was linked to a fear that members might feel 'suffocated' by setting expectations at the outset. Several members spoke passionately about the risks of a predetermined path forward, eschewing a top-down approach for one that was more 'emergent'. Members related stories of initiatives and collectives that were less effective because they were 'elite-driven' or non-participatory. For example, one member spoke about a regional initiative that they were leading, reflecting on the uneasy balance that is needed between emergence and structure:

“...what I’ve learned...is that it’s not easy. It’s all emerging...this is what complexity [ultimately] means. But in this sense, it’s been really good, because things emerge, it’s open for emergence. And I think Catalyst need[s] to maintain that door open for emergence if they really want to systemic change to come in. And I think there are opportunities, but...the level of commitment required to participate at the different levels, makes it limiting...that’s where I see the challenge...as you create our system that puts a caps on it, you might suffocate it. And that would be...my concern right now. I feel people [are] a bit suffocated sometimes.” [25]

Another member related how they mentored those joining Catalyst 2030 by encouraging them to have no expectations, and rather emphasize “opening up”:

“It's not about how do I win? Rather, it's about opening up...So, every time people will talk about Catalyst, and people would say they're lost, they don't know what they want. They have expectations, I would say: no, there are no expectations...that's what's so unique about it and that's what's so special. That's why I started preaching, and trying to explain to everybody...using my own experience.” [03]

Finally, many members perceived that boundaries and hierarchies between actors, sectors and issue areas were detrimental to collaboration and should be discouraged and dismantled. This perception was often articulated with excitement, passion and determination, reflecting a desire to identify new paths and ways forward in pursuit of GCs. The lack of expectations and predetermination was often correlated to removing boundaries between organizations and sectors, often referred to as “openness”, “open-mindedness” and “willingness to share”, which were seen as positive attitudes for entering the network. This would be contrasted with other environments where fellow GC actors might behave in ways that were territorial or “closed” to meeting new people and sharing information.

A funder member related their experience in some of the working groups, saying:

“I think a lot people who go in [to Catalyst 2030] are really deeply focused on a specific area...Because I work at [Funder Organization], we are issue agnostic. And in a lot of ways, [I] dabble in a lot of things. And so...it's interesting to be a part of any of those working groups...At the same time, I love how people are just so open and willing to share their ideas, their resources, their connections, and their networks, with me and with each other, which I think is really needed to accelerate the change that we need to see in the world.” [09]

Another member expressed surprise that fellow members were willing to share their time and contacts, in contrast to other networks where people remained less willing to connect:

“...and people would respond, you would just email anybody. And they would respond and say, Yeah, let’s meet. That doesn’t happen, usually. People don’t open up; they don’t share their email. They’re not ready but everybody else in Catalyst where whatever working group was ready to share an email.” [03]

Path ambiguity was an experience set that encapsulated different perceptions, emotions and desires. As seen in the quotes above, some members felt comfortable with the state of ‘not knowing’ whereas others felt less comfortable. Emotions such as curiosity, playfulness and kinship seemed to mitigate discomfort, while dealing with these perceptions and emotions led members to value certain feelings and behaviours, such as listening, openness and a willingness to share. Interestingly, the level of certainty about the path ahead seemed inversely related to the depth of experience held by members. As one nonprofit CEO in charge of an organization impacting millions of small businesses articulated: “I’m awestruck by the representation of organizations and people and voices through Catalyst 2030 which is just amazing. I just don’t quite know what to do with it yet. And I don’t quite [know what] to do with myself in that context...I feel like I should be listening, just listening...for the rest of my goddamn life just listening.” [44]

In this chapter, I delineated components of subjective experience—perceptions, emotions and desires—to describe three *experience sets* held by members of Catalyst 2030 when operating in the context of GCs. Importantly, these experience sets were a result of actors’ efforts in the institutional field prior to engaging in the collective, when expectations and activities were not necessarily aligned. These common experiences therefore represented frustrations in individual and organizational efforts to address GCs, and—as revealed in the forthcoming chapters—provided intrinsic motivations to come together even before members

agreed to shared goals and aspirations. Yet, despite these mutually held experiences, members of Catalyst 2030 still had heterogeneous expectations of *how* they would collaborate with one another. In the next chapter, I will delve into these different expectations that were brought into the network as members initiated their work together.

Figure 10: Experience Sets Within Grand Challenges – Path Ambiguity

Experience Set	Conceptual Categories	Second order codes	First order codes (illustrative)
<i>Path Ambiguity</i>	Perceptions	Lack of expectations	No expectations Allowing it to happen as it went along You can't build a strategy before You have to let go of control I was not looking for anything Let's see what happens
		Answers are not obvious	Stepping back and looking at the big picture Openmindedness Your thinking gets strengthened Enriching
	Emotions	'Gut feelings'	In my gut I could sense that this has something in it It feels good and it feels right
		Curiosity and alertness	I am quite curious where it will go Dabble in a lot of things
		Fun and camaraderie	A crowd of people who care A ton of fun Finding your tribe Taking attention away from the nitty-gritty
	Desires	No predetermined outcomes	The patience to let things happen Maintain that door open for emergence
		Break down social barriers	So open and willing to share People are just so open
		Learn with others	I feel like I should be listening, just listening To meet and to interact and to learn

6. Findings 2—Initiating Collaborative Work

In the previous chapter, I explored how organizational actors addressing GCs have common experience sets—fragmentation, time precarity and path ambiguity—that inform their knowledge base, comprise their emotional state, and shape their desires. Importantly, these experience sets are present in the institutional field prior to engaging in a collective effort, even when expectations and activities are not aligned. In my study of Catalyst 2030, these common experiences were motivators to come together even before members agreed to shared goals and aspirations. Yet, despite common sets of experiences, members of Catalyst 2030 still had very different attitudes and expressions of *how* their work together would transpire. In this chapter¹, I will explore the diversity of expectations amongst organizational actors about how collaborative work would allow them to better address GCs. I will then describe how these diverse expectations sorted into two polarities (‘polarities of collaboration frames’) and allowed members to maintain, shift, and transform their expectations (‘dynamics of frames’) *within* the collective space, allowing a plurality of expectations and approaches to co-exist, even as the group initiated their collaborative work. This area of exploration responds to the second research question:

- What expectations and aspirations do heterogeneous organizational actors have for collaborative arrangements, and how do these expectations influence their behaviours within collectives?

6.1 Exploring Collaborative Work

To delve into these attitudes, it was important to first understand the process of engagement that Catalyst 2030 members were undertaking. Given the literature on

¹ Parts of this chapter were included in a co-authored abstract at the Academy of Management in 2023 under the title “Affordances of Participatory Architectures to Tackle Wicked Problems.”

collectives—as explored in the earlier literature review—I anticipated that Catalyst 2030 members would convey specific goals and objectives for initiating engagement in the network. However, the interviews and observation period quickly revealed this not to be the case: members were, in fact, ambiguous about their goals and objectives. The experience sets described in the previous chapter shed some light on why this might be. With the more nuanced understanding of the experience of GCs—including fragmentation, time precarity and path ambiguity—I surmised that these experience sets comprised of perceptions-emotions-desires provided a common experiential background that supported the conditions for engaging in collaborative work, rather than a common set of goals and objectives.

In spite of this common experiential background, as I listened to members' stories and observed their interactions, I became attuned to divergent attitudes and expressions of *how* members of Catalyst 2030 felt that they should pursue their collective work. These attitudes and expressions were related to priorities for collaboration: the purposes of working together, the areas of alignment that they imagined they would need to be successful, the requirements they had of fellow members, and the ways in which they hoped to engage with others in the network. As I paid special attention to these attitudes, I began to see themes, or distinct groupings, with similar characteristics related to these areas of engagement. Importantly, members did not articulate singular attitudes but often multiple attitudes within a single interview or observation event. They were also subject to revision as members reflected on their engagement within Catalyst 2030 over time. Occasionally, members might even contradict themselves or express different themes in their accounts and explanations. This 'messiness' was intriguing and I went back to the literature to consider what might be happening.

To explain these divergent expectations about the purpose and pursuit of their collective work, I found answers in the framing literature. Framing is a concept that is used frequently

in the sociological literature, but is often used in a top-down manner that emphasizes how organizational and movement actors use frames in a macro way to mobilize and organize members (Benford & Snow, 2000; Hunt et al., 1994). This branch of framing literature is an important theoretical concept for collective organizing, particularly in the social movements literature. However, based on my observations, I was more intrigued by the ways in which members' expectations and beliefs about their collaborative work were expressed and, at the same time, evolving in light of this heterogeneity and in their interactions with the institutional field and with each other. To explore this fully, I instead delved into the use of frames in the processual, interactionist approach employed by Gray et al., 2015 to explain the microprocesses of institutionalization. Gray and colleagues (2015, p. 116) explain that, "Frames not only exist a priori to be named and invoked from wider cultural repertoires but involve active struggles and negotiations over meaning before a frame can solidify and become institutionalized, triggering dynamic processes of meaning construction within and across groups, organizations and fields in keeping with the social constructionist aspect of institutional theory." To identify these microprocesses, they draw upon "interaction rituals" (Goffman, 1974) and "dynamics of meaning" (Zilber, 2008, p. 164), to identify frames, or what they quote as the "little tacit theories about what exists, what happens, and what matters" (Gitlin, 2003, p. 6).

I found these concepts useful as I tried to make sense of the multiple ways in which Catalyst 2030 members experienced GCs prior to their engagement in the collective, and then initiated their engagement in the network and carried forward their collaborative work. The attitudes for collaborative work were the interaction rituals and associated meanings that members expected to engage in when they entered into the collective space. Interaction rituals are "rules of conduct that bind the actor and recipient together" (Goffman, 1967, p. 90; cited in Gray et al., 2015) and they are enacted through the shared expectations about what is

appropriate and desirable (Gray et al., 2015). Importantly, interaction rituals are developed within the contexts in which actors are habitually embedded and they become infused with meaning as they are enacted in the day-to-day routines of everyday work and life (Hallett & Ventresca, 2006; Zilber, 2006). When actors come from different institutional spheres, their interactions can spur the transfer and transformation of these rituals, creating institutional change (Zilber, 2006).

In the context of Catalyst 2030, organizational actors came together with a shared experience base, but, due to their heterogeneity and the interactions that they had experienced prior to this particular collective engagement, they also arrived with different interaction rituals and associated meanings (“frames”) for how to engage with one another. The messiness that I was seeing was a result of the “struggles and negotiations” that trigger “dynamic processes of meaning construction within and across groups, organizations and fields” (Gray et al., 2015, p. 116). By repeating, negotiating, and modifying these frames in their interactions across the network, Catalyst 2030 members were beginning the process of institutionalization through ‘bottoms-up’ micro-processes. Interestingly, in my observation, Catalyst 2030 provided a space for a plurality of frames to exist simultaneously, enabling the network to grow its membership and sustain engagement in spite of this dynamic process of meaning construction. In the chapter that follows, I will describe four different *collaboration frames* with which organizational actors initiated engagement alongside fellow actors in the collective, the way in which these frames sort into two distinct polarities, and finally, four dynamics of frames, ie ways in which actors maintained, shifted, and transformed their frames while working together.

6.2 Collaboration Frames for Grand Challenges

Consider the following quotations:

- “I mean the whole point of this is supposed to be about action. And there’s a lot of...talking, there is a lot of sharing which is necessary, it’s important and we have to learn from one another, [but] at a certain point just get on with it. And I think that, yes, collaboration is all of these things of course. However, in the very real, in the most important sense, it is only the [action] one.” [38]
- “If you really want to change systems and have long term impact...advocacy and broadening the message [and] changing the way people think [is] very hard to measure but has, in the end, much more impact than helping a school here or there.” [40]
- “You know, I've learned a lot more just in terms of listening. We've had our moments, but there's a deep respect for who we all are as individuals, and our differences, our diversity, and it's respected pretty much across the board...” [29]
- “We are all very focused on our work the whole day...the work that my organization does, [but] this gives you a chance to actually sit back and look at the larger world of change...you can sit back and see your work in perspective.” [06]

These quotes represent four distinct frames for how Catalyst 2030 will allow them to better address GCs than working on their own. The four collaboration frames that I identified are: *coordinated action*, *advocacy*, *social learning*, and *meaning-making*. In each of these collaboration frames, members of Catalyst 2030 use unspoken but taken-for-granted attitudes and norms to explain and justify their participation in the network. In the interviews, these frames were revealed through questions which explored their interactions with actors in the broader GCs in which they already operated; some of these experiences were prior collaborative engagements, as well as interactions within organizations and sectors that had preceded their particular GC interests. It is important to note, therefore, that the frames with

which members initiated their collective work with Catalyst 2030 were ‘imported’ from other institutional fields in which these actors had been part of, creating a new interactive space in which these frames collided, merged, and/or came into friction with frames held by other members. In the sections below, I describe the collaboration frames in terms of four aspects: (1) the *purpose* that was ascribed to the network; (2) the *priorities* that participants deem important; (3) the *principles* that participants expected to organize around; and (4) the *orientations* that they anticipated in their collaborative work with the group. *Purpose* and *priorities* represent the specific interaction rituals that members used to engage with one another, while *principles* and *orientations* associate meanings and values with their engagement. These frames were important since they shaped the ways in which members expected to engage with one another in the formation and maintenance of the Catalyst 2030 network. These frames also formed the ‘raw material’ for the maintenance, transfer, and transformation of the institutions with which actors arrived to Catalyst 2030.

Figure 11: Collaboration Frames of Heterogeneous Organizational Actors

	Coordinated Action	Advocacy	Social Learning	Meaning- Making
Purpose	Getting things done with concrete actions	Influencing outside actors to adopt enabling policies	Connecting with diverse actors for learning and understanding	Cohering around shared meanings and values
Illustrative quote	“I mean the whole point of this is supposed to be about action. And there’s a lot of...talking, there is a lot of sharing which is necessary, it’s important and we have to learn from one another, [but] at a certain point just get on with it. And I think that, yes, collaboration is all of these things of course. However, in the very real, in the most important sense, it is only the [action] one.” [38]	“If you really want to change systems and have long term impact...advocacy and broadening the message [and] changing the way people think [is] very hard to measure but has in the end much more impact than helping a school here or there.” [40]	“You know even if concrete groups [aren’t] being achieved, I think that exploration...is super interesting, healthy, good to delve into because there are all these different dimensions of the space of this field you know. So [I] think that’s all great.” [43]	“We are all very focused on our work the whole day...the work that my organization does, [but] this gives you a chance to actually sit back and look at the larger world of change...you can sit back and see your work in perspective. [06]
Priorities	Roles, coordination, efficiency	Shared agendas, a “seat at the table”	Curiosity, learning	“Bigger picture” perspective, values

	Coordinated Action	Advocacy	Social Learning	Meaning- Making
Illustrative quote	“What makes this collaboration work is...a clear set of expectations around roles and responsibilities: which funder is doing what and then a clear set of expectations around process and process improvement.” [13]	“[They] get involved in these things [because] they want to change policy. They want to work with the government. They want to lobby the government... they need to find a way to work together now.” [18]	“There are certainly people that I have connected to that I don’t have any institutional reason to connect to, but I have a personal connection or an interest in what they are doing.” [43]	“ [In other places] there’s a lot of discussion around interest convergence... Actually, up here a level above, we agree on the same vision of the way the world should be, we may not agree on the same path to get there. But we agree on the same vision. So let’s all come together and share that and work in that space.’ [24]
Principles	Goal alignment and decision-making	Power in numbers	Respect for different viewpoints, listening	Modeling and practicing values within the architecture
Illustrative quote	“So if you have a goal, and it’s time bound, and it’s specific, which [the] SDGs are, then it’s easier to be able to work toward achieving those things...even as big as [they are].” [9]	“Any time I can kind of join forces with members of that community I feel compelled to do so.” [36]	“You know, I’ve learned a lot more just in terms of listening. We’ve had our moments, but there’s a deep respect for who we all are as individuals, and our differences, our diversity, and it’s respected pretty much across the board...” [29]	“I was seeing evidence of donors affecting something... outside of them. And I’m like, we do enough of that. It’s actually <i>us</i> that needs to [change].” [24]
Orientations	Process- and skills oriented	Power-oriented	Co-creation oriented	Utopian-oriented
Illustrative quote	“I don’t have a background in any of this but I do feel that I have a strong background in process, and that’s what saves you. If you know what to do through the process...you can get an answer that makes sense.” [2]	“I think it’s up to Catalyst as a collective unit to decide how [they will] be engaged...but they have to be engaged, because they’ll just sort of continue to outstrip our ability to make a difference. They’ve got to be at the table. That’s my perspective.” [35]	“They are my peers, and it’s our responsibility, each one of us has a responsibility. It’s not like someone is inviting you to do something, [or] someone is organizing something for you, or someone is having a plan and you are part of the plan. No, we are creating this together.” [42]	“I know where I am, I feel and...approach people in a whole different mindset. And I think that’s how I saw Catalyst to be about.” [3]

6.3 Collaboration Frame 1: Coordinated Action

The first collaboration frame is *coordinated action*, which I describe as actors assuming designated roles in pursuit of common, pre-defined goals, often within a specific timeframe. In this frame, Catalyst 2030 members expressed the purpose of their collaborative work as

“doing”, often in contrast to activities perceived as less action-oriented such as talking, meeting, learning and sharing. Members with this frame prioritized coordination, agreeing to timeframes and roles with the anticipation of greater efficiency. Members expressed values such as the belief in time as a scarce resource and the need to set goals and be expedient with decision-making. When using this frame, members expected their activities to be process-oriented and for members’ existing skillsets be taken into account when creating roles and workplans.

Actors using this frame saw the purpose of Catalyst 2030 as concrete action, speaking negatively about time spent in conversation or collaborative thinking. For example, one member said: “I personally felt I’m wasting time attending in-person sessions, online sessions with them whereas we are far from doing anything practical to implement the SDGs. So I said that when I first joined, “Look, if this is going to be a lot of blah blah blah and a little of doing I don't want it to be very honest because my time is worth more than that.” [26] Another member echoed this sentiment, saying: “I really would like to make sure about in my efforts to help in leading Catalyst 2030 is that there is value added to what we are doing, and to what other members are doing it. Because there's no sense in working together, if all you do is just chit chat, right.” [12] In other cases, activities such as meeting, talking and sharing were acknowledged as valuable but still not the valid purpose of the collaborative work: “We can’t lose our attention to ‘are we actually helping to move the needle?’...is it really the case, that we are serious about making that happen? Because otherwise, it was a lovely place in which to get to know people, meet people, exchange ideas, be inspired...Okay, fine, but that’s not really what it’s about.” [41]

When the coordinated action frame was dominant, actors prioritized roles, coordination and efficiency. For example, a member from the funding community described a successful collaboration that had come from their engagement in Catalyst 2030:

“So we developed a fund to fund [specific SDG] projects, a network-based system to really uncover hidden gems that other funders weren’t finding in the global south. And what makes this collaboration work is I think, A, values alignment – we are very well aligned on what we think is important and how we want to go about doing what we’re doing. I think a clear set of expectations around roles and responsibilities which funder is doing what and then a clear set of expectations around process and process improvement because we’re funding what we’re doing in rounds. Sequentially, we just finished one round of funding and we’re going to do a number of other rounds. We categorized what worked and what didn’t work and in the next round we’re going to improve upon what we did. So an understanding that that is the process that we need to take to improve what we’re doing is key.” [13]

Members using this frame valued principles such as setting goals as a group and making decisions quickly and efficiently. For example, one member explained the importance of organizing around the SDGs: “So if you have a goal, and it’s time bound, and it’s specific, which [the] SDGs are, then it’s easier to be able to work toward achieving those things...even as big as [they are].” [09], while another member articulated that the lack of a “Northstar” (the equivalent of a goal): “But my observations have been that...the distributed leadership, there’s lack of alignment...it hasn’t felt like it’s landed because there hasn’t been [a] Northstar...what we’re going to actually aim to achieve together...it can be hard to get there because everyone’s got their own thing.” [30] Yet another member expressed the frustration of working in a group that was struggling to make a decision: “So, it was this collaborative process and I kept screaming, ‘But we have to make a decision.’ That’s one of the problems with collaboration: who is actually prepared to make a decision? And that has [been] really frustrating at times. It doesn’t bother me to make a decision.” [02]

Another member used several sports analogies to emphasize the importance of coordination and goal setting:

“There is something there, but we have to find it and we have to harness it and we have to direct it and you have to make it happen...So I am not sitting on the stands and judging the people. I am trying, getting in there and trying to kick the ball around and say so what is that thing that we could do? We’re here, you know, we all here, we are around the field. There is a goal post. Now what?” [02]

Lastly, members with this collaborative frame were oriented around process and skills, expecting actions to be planned out beforehand and utilizing skills that were already present in the group. One member related a situation where they were asked to do something that was outside of their experience, but which could draw upon their process skillset:

“I was a consultant and I was trained in process facilitation. So I thought, okay, I can take the 30 or 40 people, or 50 people that were now on this WhatsApp group – maybe it was 60, I’m not really sure but it wasn’t any probably more than 60, on a process to [accomplish a project]. If I understood that it was going to be collaborative, it was nothing that I could invent. It had to be invented by others. So, I did have a pretty good understanding of the process of collaboration and what that would entail...I don’t have a background in any of this but I do feel that I have a strong background in process, and that’s what saves you. If you know what to do through the process...you can get an answer that makes sense.” [02]

Another member expressed, “I love that I can contribute not only [to] an issue focus...but also bring to bear my experience and ideas around organization-building...I’m glad to be able to help build the thing and feel useful in kind of helping to do so...it feels like a worthwhile way to spend time.” [46]

6.4 Collaboration Frame 2: Advocacy

The second collaboration frame is *advocacy*, which I describe as actors coming together to influence other actors outside of the network to adopt more enabling policies for specific approaches to GCs. In this frame, members expressed the purpose of collaborating as influencing, often with a specific target audience and a policy or funding mechanism in mind. Members using this frame prioritized banding together with fellow participants around shared agendas and obtaining a ‘seat at the table’. When using this frame, members would express the principle of power in numbers, with the belief that larger numbers of members collaborating together would lead to greater change. Members were primarily power-oriented, with the intent of influencing those outside of Catalyst 2030 to adopt their own beliefs and behaviours.

Actors using this frame saw the purpose of Catalyst 2030 as advocacy, or convincing

outside actors to promote specific, pre-determined policies agreed upon by members. Members with this frame contrasted advocacy to other activities, for example: “[Our chapter] will only be working on public sector advocacy because we feel change on a major level comes from public sector advocacy. And I said we do not do events, we do not do functions, we do not do activities, and the reason being is because...the gap here is policy development.” [14] In one prominent example, I observed a sub-grouping during the research period called “Shifting the Funding Paradigm” which was devoted to an advocacy effort to change the practices of funders. On the Catalyst 2030 website, the group described their efforts in the following terms:

“Catalyst 2030 is using the power of collective action to achieve a new funding paradigm. If we are to truly address global crises of our time, it is crucial that the environment that social impact actors operate in enables their work, rather than hinders it. This means ensuring that the funding that drives impact is effective, sustainable, and embraces systems change. Catalyst 2030 and its members have a vision of a funding paradigm that is grounded in trust, partnership, and collaboration, all with the goal of driving global systems change to achieve the UN SDGs.” (Catalyst 2030, n.d.-f)

Members utilizing this frame prioritized alignment on agendas and gaining ‘voice’. For example, in this sub-grouping, the aim was to convince funders to shift their funding conventions and to do this, the group undertook several activities. First, they wrote a report that detailed the reasons behind the shifts. Next, they wrote an “urgent letter” and mobilized the Catalyst 2030 to sign the letter, ultimately gathering more than 1200 signatures from prominent NGO leaders. Finally, they created a “funder assessment tool” which allowed funders to gauge their current practices against the set of standards that they promoted. They then promoted the funders committed to these new practices on a searchable map on the Catalyst 2030 website.

Members with this frame expressed the principle of building ‘strength in numbers’ to accelerate existing solutions and methods. In many cases, members intimated that there was already commitment to a specific, pre-existing cause, and the need was to bring people

together to assemble greater power and ‘advance’ a cause. One member expressed this in relation to the field of social entrepreneurship: “Certainly I’m always working to forward the missions of [my organizations], but I feel also committed to advancing the field of social entrepreneurship in systems change...particularly [with] kindred spirits [who] have a lot of commitment and a lot of expertise and experience. Any time I can kind of join forces with members of that community I feel compelled to do so.” [36] Another member related this to the field of social innovation: “[I] was always frustrated with social innovation, which was far too...technocratic, balkanized, really...I kept thinking, until we start to think about our work through a movement building lens, we’re never going to get to the kind of impact we need. And Catalyst for the first time was an opportunity where I saw...a collective impulse from folks saying, we’ve got to figure out a way to work together to accelerate the progress of the SDGs.” [35]

Actors using this frame often viewed their activities with a power orientation, seeing the network as a means of counterbalancing elite institutions and more powerful outside actors. A member described this in detail: “I...think that we now live in an era of disproportionate power of the private sector....And until we, in a very clear eyed manner, recognize the concentration of power, assets, and wealth in the hands of this sector, we’re never going to get to where we need to go unless we engage them meaningfully. I think it’s up to Catalyst as a collective unit to decide how [they will] be engaged...but they have to be engaged, because they’ll just sort of continue to outstrip our ability to make a difference. They’ve got to be at the table. That’s my perspective.” [35] Another member emphasized this power orientation, seeing Catalyst 2030 as a way to bring lesser represented voices to the proverbial “table”: “How do you get “doers” at the decision-making table so that people with real proximate expertise are making the decisions?...[so] that you’re not just getting a small one percentage of wealthy people directing our next course of history?” [11]

6.5 Collaboration Frame 3: Social Learning

A third subset of actors envisioned that participation in Catalyst 2030 would result in *social learning*, or the expectation that a participatory architecture will create connections and shared learnings between diverse actors, thereby enabling better understanding and approaches in response to wicked problems. Actors using this frame felt that the purpose of the network was to connect with diverse actors for learning and understanding, whether or not this led to coordinated and jointly-managed activities. They valued priorities such as curiosity, sharing and exploration, often stressing that the diversity of the network could lead to possibilities that were not yet discovered. In terms of principles, they expected fellow members to have respect for a multitude of viewpoints and would engage in listening as much as, if not more than, speaking. Members with this frame were oriented toward a process of ‘co-creation’ rather than utilize pre-conceived solutions and concepts.

Members using the social learning frame saw the purpose of Catalyst 2030 as a place to connect with different and interesting people. They would often emphasize the value of the diversity of the network and how meeting others with different views supported their own work. Collaborative projects—like those emphasized in the coordinated action frame—were less important or equally important to exploring, learning and sharing. As one member explained, exploration was equally important to “concrete” collaborations, saying, “You know even if concrete groups [aren’t] being achieved, I think that exploration...is super interesting, healthy, good to delve into because there are all these different dimensions of the space of this field you know. So [I] think that’s all great.” [43]

One member with an especially strong track record of collaborating with fellow members expressed the linkage between social learning and collaborative work, describing her own process:

“To me, it's about, you know, like minded people learning from each other, helping each other, supporting each other to achieve a goal, together. And, of course, reaching out to a lot of people, I created all these partnerships and collaborations with different people, because everybody who said something that I thought was interesting, I reached out to them asked to meet them. So, I met with a lot of Catalyst members, because after I'd hear them whether in the General Assembly or in the working group, I emailed them separately, I ask them: Can we meet and just talk, chat, share resources, talk about my work, listen to what they have, whether that developed into something or not, was okay with me, but it was about, you know, expanding and learning.” [03]

Another member explicitly noted that they had “institutional” reasons for connecting with some members, but in other cases the relationships were forged because of personal interest:

“...some of the key leadership people in working groups are from our own community that makes institutional sense for me to kind of continually engage to be connected and we have overlaps of stuff we talk about. So that helps facilitate and me stay connected to people that I would have been connected to anyway...[Later in the conversation] There are certainly people that I have connected to that I don't have any institutional reason to connect to, but I have a personal connection or an interest in what they are doing. I do think it's created that space. Broken down some barriers. Broken down definitely. [43]

Members using this frame prioritized curiosity, sharing and exploration, considering these to be “challenges”, signaling that they were priorities when engaging and aligning activities with fellow members. With laughter, a member said: “You know, I literally would joke [that] I learned more in ‘Catalyst in one year than I did in the last ten [in my previous field] because I hadn't been challenged right at that higher level with these folks. So...anybody that's committed to lifelong learning, Catalyst is the place because all these people...you're just learning constantly.” [34] Another member described being “intrigued” by the process of creating the network structure: “We had [to] go through a couple of different iterations of structure and soothe some egos and all that sort of stuff. For me personally I get intrigued by situations like that. I tear my hair out over them, but they engage me and that's what the work of collaboration is about.” [33]

When members were using this frame, they were less likely to express impatience with numerous meetings and engagements, instead expressing a fluid sense of time. One member described this as a journey: “I think I came into our journey with open-mindedness. I had no

expectations. I said these are the kind of problems I want to be involved in solving. So I just went with that. I was just allowing it to happen as it went along.” [4]

When using this frame, members often expressed the principles of the importance of participant quality and listening. Members would often speak about the respect that they felt for others in the network, highlighting the experience and range of views that were included in the group. Members emphasized the importance of listening so that they could learn from others’ experience. A member said, “I’m awestruck by the representation of organizations and people and voices through Catalyst 2030 which is just amazing. I feel like I should be listening, just listening. But for the rest of my goddamn life just listening.” [44] Similarly, another member said: “You know, I’ve learned a lot more just in terms of listening. We’ve had our moments, but there’s a deep respect for who we all are as individuals, and our differences, our diversity, and it’s respected pretty much across the board...” [29]

The social learning frame came with an orientation toward co-creating solutions, which was a significant difference from the coordinated action and advocacy frames which often emphasized pre-determined solutions. For example, a member described the activities of a working group, saying: “It was a great group and we did a lot of work and nothing that emerged from my group was something one person thought of. It was always one person with the idea backed by the other. So I think [we came very close to] collective intelligence in action, and we came up with some very great ideas and it was all a group exercise.” [7] In a similar vein, another member described how plans emerge through a collective creation process: “They are my peers, and it’s our responsibility, each one of us has a responsibility. It’s not like someone is inviting you to do something, [or] someone is organizing something for you, or someone is having a plan and you are part of the plan. No, we are creating this together.” [42]

6.6 Collaboration Frame 4: Meaning-Making

The fourth and final collaboration frame is *meaning-making*, or the expectation that Catalyst 2030 provides the opportunity to create broader meaning or values that will allow society to better position itself to resolve grand challenges. Members using this frame joined Catalyst 2030 with the purpose of cohering with other members while espousing and developing new values and mindsets. When using this frame, members were less interested in solutions and rather prioritized the creation of new practices and behaviours. With this frame, the principles of values and mindsets was paramount, and members expected that these elements would be modeled and practiced by the group. Members with this frame were utopian-oriented, meaning that they were aiming for an ideal state within the network. In this way, Catalyst 2030 provided a means of practicing ideals within a ‘microcosm’ of the wider world, with the anticipation that this would ultimately spread to actors outside of Catalyst 2030.

Members using this frame saw the purpose of Catalyst 2030 as a place to practice a specific set of values while shifting mindsets. In archival documentation and in my observations, this frame was described as “shifting the narrative” or “shifting dominant culture”. Phrases that were used in the interviews included “moving up a level”, “a click above” and “values”. Members were interested in gaining a broader perspective and situating their own work within a larger pattern of institutional change. One member described this, saying: “We are all very focused on our work the whole day...the work that my organization does, [but] this gives you a chance to actually sit back and look at the larger world of change...you can sit back and see your work in perspective.” [6] Importantly, this frame differed from the other frames, which also emphasized connecting to one another, in that this frame stressed collective values as more important than actions or individual learning and growth. For example, one funder member described their attraction to Catalyst 2030:

“...it was at a time where the foundation was starting to think about a new set of investments and looking at the inspiration for new paths forward [for] a new world, thinking at a click above where we worked before, which is implementation of projects in lots of different places. Say, what if we actually moved up a level and looked at it from values and motivation and collaboration, and so Catalyst was lined up with that...this seems like a crazy idea. And it did, it seems like a great, overly ambitious hard to manage. But why not something worth trying? And so we decided to enter into a seed funding kind of relationship to give Catalyst some legs.” [24]

When using this frame, members prioritized values, not just in words but in practice. It was important to members that the values espoused by the network were enacted in the interactions that they had with other network members. A member described the importance of the values in their decision to become more involved in Catalyst 2030: “A friend said, hey brother, this might be interesting for you...I was looking at it and...I thought, oh wow... the values they really struck out to me, really jumped out to me. However, I thought oh well anyone can put something on a canvas, but let's see now. And then, so I spent the next six months becoming a more slowly, a part of Catalyst 2030 to make sure if it was my, our ancestral calling.” [5] Another member the importance of this alignment: “I experienced...they were bringing people to a table based on values alignment. [In other places] there's a lot of discussion around interest convergence, like if you want to solve poverty, and I want to solve poverty, but we may not agree on a, b and c, we can at least agree on poverty. So let's work on that. But they debunked that a bit and said, ‘Actually, up here a level above, we agree on the same vision of the way the world should be, we may not agree on the same path to get there. But we agree on the same vision. So let's all come together and share that and work in that space.’ And that is what I think is the enabling piece.” [24]

When using the meaning-making collaboration frame, members expressed the principle of the network as a place for modeling new values and mindsets so that others would change their values as well. One member articulated how they saw this happening at Catalyst 2030:

“I kept a keen eye on the WhatsApp group and I was quite pleasantly surprised to see how decisions were being taken by all the members...I watched the process that was happening, around the name the logo. And that’s when I said okay, this is looking sensible, this is not a top down kind of window dressing kind of activity. It was not like a washing effort so I felt, okay, this could be something...[Later] as a social entrepreneur, all of us are very, are historically reasonably competitive, reasonably territorial...some of this [co-creation and collaboration] in action, no amount of theory, no amount of reading is of any help at all...Because it’s about behaviour and all of us simulate, we learn about behaviour from others...so I think that behaviour change I mean to watching others, to me that has been very seminal...like the fact that there’s a brown woman leading, is very significant because historically...[in the social entrepreneurial] eco system, it’s always been very white male-dominated.” [07]

Another member described how the network began to use live multi-language translation in meetings, an inclusionary practice that they felt was a core value of the network:

“I got really emotional, because these other...global conferences don’t do live translation...I sobbed. I lost it. And I saw the power of being part of a community that will make that happen and make that a priority, because members should be able to speak in the language of their choice. The tech exists, yet the indignity of making people express themselves in English as a ...dominant language is not dignified, it’s really offensive. And the fact that we could make that happen, that to me was a game changer. Really powerful.” [22]

Members had a ‘utopian’ orientation, aiming for an ideal state, and were critical if fellow members did not seem to be living out their values in the network. One member disengaged from a sub-grouping, explaining: “It just felt like a lot of what I heard before, and I didn't really know what we were supposed to do with it. I wanted to see the [members] around the table commit to changing their practice and doing something different in their circles. And I wasn't seeing evidence of that; I was seeing evidence of [members] affecting something...outside of them. And I'm like, we do enough of that. It's actually **us** that needs to change. And I wasn't seeing evidence of that...So we just didn't listen in every time.” [24, emphasis added] For members using this frame, the natural attrition or disengagement of members who didn’t espouse the values was not necessarily a negative outcome. One member described how this might result in members exiting the network, specifically about

the value of non-hierarchy, saying: “It's a tension ...Because if the members want it to be a hierarchy, then that's against the whole network philosophy...So, there's a problem there...One has to be clear what this network is about. And so, if the member doesn't like it, and it's frustrating, wants to quit, the network should not go and try to follow that member to bring him or her back.” [3]

6.7 Polarities of Collaboration Frames

One of the interesting observations of the collaboration frames is that they tended toward two distinct *polarities*. I dubbed these categories polarities because the modes of behaviour encouraged by the frames essentially pulled members in opposite directions, with the potential for tension and conflict. While members did not necessarily sort themselves into these polarities, they were occasionally commented upon in interviews. As one member described, with a certain degree of levity:

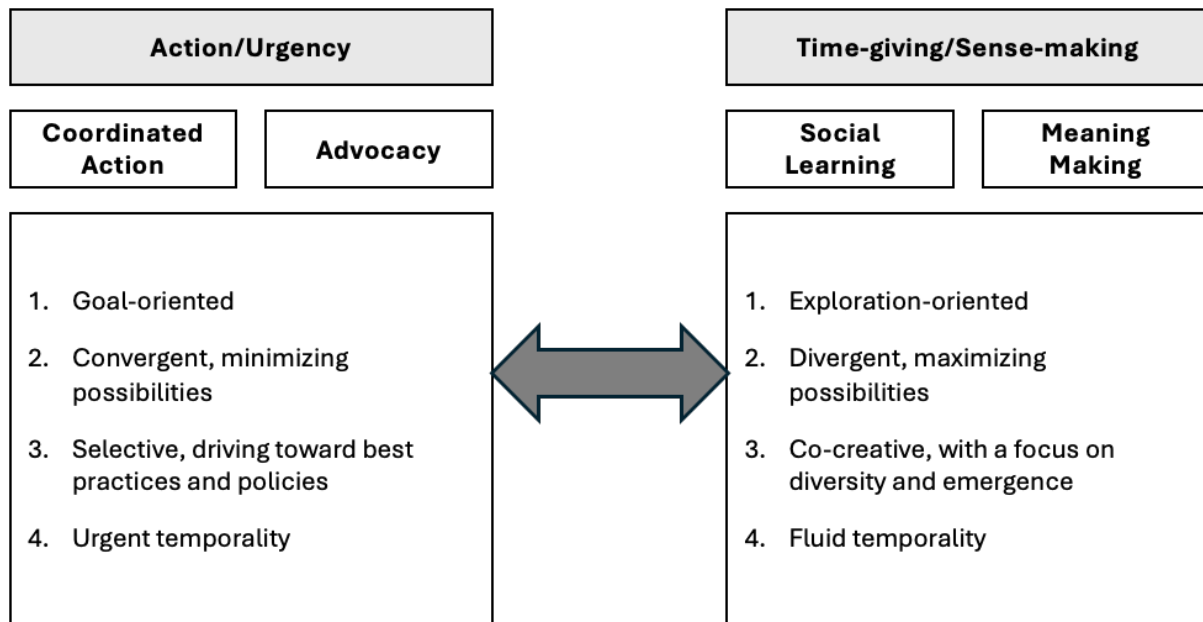
“I think we need to recognize that, from a collaboration perspective it's deeply challenging to bring all of those different players into the room together. Because you will have the ‘I want to get shit done’ and you'll get the ‘I want to sit around and wax lyrical’ and then you've got the combined...And then people wanting to kill each other, like literally. Then some people want to breathe and some people want to get stuff done and like, are you done breathing? You can have that in the same room.” [22]

When analyzing the collaboration frames, I discerned several modes of behaviour (‘interaction rituals’) ascribed with values (‘dynamics of meaning’) that tended to divide the frames into these polarities:

- **Goal-driven vs Exploration-driven:** The coordinated action and advocacy frames favored modes of action that were goal-oriented, which prioritized outcomes over process. On the other hand, the social learning and meaning-making frames prioritized exploration, which emphasized process over outcomes.

- **Convergent vs Divergent:** The thinking patterns of those with coordinated action and advocacy frames tended to be convergent, with the aim of driving toward best practices and ideal policies. With these thinking patterns, conversations were often steered toward eliminating possibilities and honing in on the few best approaches. By contrast, the social learning and meaning-making frames prioritized divergent thinking patterns, favoring conversation that maximized and built upon a wide variety of possibilities. For these frames, whittling down options was seen as reductive and counter-productive.
- **Selective vs Co-Creative:** For members with coordinated action and advocacy frames, solutions were built through a selective process, with some solutions rising to the top and others being eliminated. On the other hand, for members with social learning and meaning-making frames, solutions were co-created, with an emphasis on diversity and emergence. In this vein, potential solutions did not get eliminated but rather absorbed into a creative process where new possibilities emerged through the assembling of all available ideas.
- **Urgent vs Fluid:** Finally, the temporalities promoted by the frame groupings were in stark contrast. While coordinated action and advocacy frames largely operated with an ‘urgency’ temporality, preferring strict timeframes and decision-making, those with social learning and meaning-making frames tended to operate with a ‘fluid’ temporality, seeing time as a flexible resource and being more open to undefined timeframes.

Figure 12: Polarities of Collaboration Frames



6.8 Dynamics of Collaboration Frames

The collaboration frames and polarities described above serve an important purpose: they encapsulate expectations of members about how their collective work will unfold, and they denote what is important and valued in their interactions with other members. Frames are templates that combine interaction rituals and meaning, and explain why actors act and interact in certain ways (Gray et al., 2015). Reflecting on the interviews and observation notes, it seems likely that members joined Catalyst 2030 motivated by the experience sets, yet engaged with members based on their frames. When heterogeneous actors come together to address GCs, they bring with them common experience sets but possess divergent collaboration frames. Therefore, both the common experiences and the plurality of collaboration frames were present in the network at its outset. While the experience sets give a shared impetus for joining together in a collective, the frames provide diverse ways of interacting with one another and meanings that arise from those interactions.

As noted earlier in this chapter, I observed a certain ‘messiness’ in the application of the

four frames by members in the network. While members often joined Catalyst 2030 with a dominant frame, the application of these frames was inconsistent and unstable. Collaboration frames were applied in a ‘dynamic’ way, meaning they were malleable and subject to revision over time and in various contexts. In particular, in my observation periods, I witnessed and documented moments where these frames created frictions and conflict, or moments of alignment and connection between members, and how these interactions created opportunities for frames to be maintained or to shift. These “struggles and negotiations” (Gray et al., 2015, p. 116) allowed heterogeneous members to enter the network with a certain level of ambiguity, similar to the robust action strategy described by Ferraro and colleagues in their work on participatory architectures (Ferraro et al., 2015). In most cases, Catalyst 2030’s broader network and sub-groupings presented a sufficient number of fellow members operating with the same frame to ensure that members felt a ‘frame kinship’ that allowed them to make sense of the interactions and follow suit. However, over time, as members interacted with each other, they were able to maintain, shift, and transform their expectations about collaboration, in ways that gave fluidity to their frames. Four major paths are described below, reflecting the multiple ways that members could ‘play’ with frames and find different ways of navigating in the network. Ultimately, these dynamics served to “forestall disengagement” and give members the purpose and meaning necessary to carry forth their collective work with “multiple justifications” (Ferraro et al., 2015, p. 374).

Maintaining frame consistency

The first path I observed was members maintaining their dominant frame by joining or creating sub-groupings where their frame was consistent and/or compatible with that of other members. For example, I conducted one interview with a funder member with a dominant coordinated action frame whose primary engagement with Catalyst 2030 was through the

Donor Working Group (DWG). In their own words, the meetings with this group had been “the most pivotal” part of being in Catalyst 2030 [13]. Furthermore, this funder identified fellow members through the DWG to form a further sub-grouping focused on co-funding a number of large-scale technical projects. When I asked them what was enabling about this funding collaboration, they highlighted “values alignment”, a “clear set of expectations around roles and responsibilities”, and a “clear set of expectations around process and process improvement”, all strong indicators of the coordinated action frame. Interestingly, this member had spent time in other working groups and felt these needed to be “re-visited”, due to their focus on activities that they deemed less important. In their description, they said “it seemed to me for the working groups what most of them wanted to achieve was to write white papers and to me that...having written many white papers, I just saw the limited utility of writing out more white papers.” According to my observations, the DWG had a significant number of members with the coordinated action frame (although not exclusively), while other sub-groupings have other dominant frames. It is likely that the ‘frame kinship’ with the DWG allowed this member to feel that the time spent in monthly meetings with the group was productive and useful. Despite their disappointment with the other working groups that they visited, they were able to continue their involvement with Catalyst 2030 by attending the DWG and moving ahead with fellow members who shared the coordinated action frame.

In another instance, two members with strong coordinated action and advocacy frames created a sub-grouping after discovering a particular issue that required coordinating a large number of fellow members and influencing external stakeholders to change their policies, mindsets, and behaviours. When describing the early days of forming Catalyst 2030, one of these members specifically recalled a concrete deliverable that involved efforts to communicate specific concepts with external audiences. They recalled, “So there were clearly a lot of people who felt that this was an important thing to communicate, it is the first thing

that we chose to communicate as a group about.” [39] When interacting with the sub-grouping that these members formed, I was struck by the ways in which the activities reflected the coordinated action and advocacy frames: mapping the stakeholder landscape, developing an assessment tool, drawing up a petition, and developing a resource bank. By creating a sub-group that reflected their dominant frames, these members were able to maintain their frames while also assembling members with the same frames, thereby minimizing friction and sustaining engagement.

In a third example, two members with dominant social learning and advocacy frames came together to create a sub-grouping that supported leadership transitions. Interestingly, these two members had very different approaches but found a compatible way to work with one another to create a cohesive sub-group. The member with the dominant advocacy frame largely took on the outward-facing role, gaining visibility for the group amongst external audiences and curating events that would influence these stakeholders to understand the unique challenges and opportunities for social entrepreneurs. On the other hand, the member with the dominant social learning frame took a quieter, yet equally important role, emphasizing the need to ensure space for different opinions and always taking time to reflect and synthesize numerous viewpoints during sessions. When describing the overall approach at Catalyst 2030, this member said: “You can see there are differences of opinion. But as the network starts to develop and people get to know each other and trust each other, even if they disagree or don’t understand, that’s how you build the network.” [27] By maintaining their frame consistency, these two members were able to capitalize on their differences and create a sub-grouping that grew consistently throughout the course of my observation period.

Adopting multiple frames

A second path that I observed was members holding two or more frames simultaneously, and applying different or multiple frames to sub-groupings when necessary. One example was a member who was a passionate advocate for gender equity. This member joined Catalyst 2030 with the aim of integrating equity and inclusion across the SDGs. In their interview, I noticed that this member had a dominant meaning-making frame, with lesser dominant advocacy and social learning frames. They described how upon joining the network, they set up an Issue Based Group (IBG) centered around gender equity with the hope of using this group to influence the numerous collaborations cropping up across Catalyst 2030. However, although the group became an excellent place for social learning, it was isolated from other sub-groupings and did not have the meaning-making influence she was seeking. After a period of time, this member decided to disband the IBG and instead chose to join forces with the Climate Action Group to integrate gender equity into collaborations devoted to climate initiatives. As they described, “I have merged forces with the Climate Action Group. And so together, we will try and see how we can make both climate action and gender equality part of everybody's business because, that is how it should be.” [06] At the same time, this member became integrally involved with one of the Catalyst 2030 events as a Co-Chair, a role that they did not foresee for themselves when they first joined the network, but which has a strong meaning-making frame of shifting funder behaviour. This member's experience is illustrative since they have found a constructive way to maintain their meaning-making frame while adopting other frames that are meaningful to fellow members, specifically the coordinated action and advocacy frames that are dominant in the Climate Action Group.

Another example involved a member who joined Catalyst 2030 with the aim of setting up a regional chapter for advocacy, but then stretched to adopt other frames due to the COVID-19 pandemic. In their interview, I noticed that this member had a dominant advocacy frame

which led them to initially focus on the chapter's regional advocacy efforts. As they described, "I think one of the reasons why I was asked to lead the effort in [region], is because of the work that we're already doing...engaging the [regional association] and its instrumentalities, engaging governments... because those who are already engaged in policy advocacy, we're actually engaged with them already. So, in that sense, I think, by working with Catalyst 2030, we can have a broader movement for social entrepreneurship in the region." [12] When the pandemic hit, however, this member stretched to include additional frames due to the evolving needs of members who were struggling to recover during the COVID-19 pandemic. As they narrated, "Then...the pandemic came. So, there have been limitations...in terms of pursuing the strategies for accelerating the achievement of the SDGs through collaboration of social entrepreneurs. One of the main things that we have tried to do...[is] to make sure that we respond to...making a difference in terms of helping social enterprises to recover. And helping social enterprises to become key actors in building back fairer...not only better, but fairer. So we put all our platforms around those." Based on these needs, the regional chapter became more focused on efforts that could rather be classified as coordinated action—such as creating benchmarks and standards—and social learning—by convening networks of social entrepreneurs focused on specific thematic areas. Importantly, this member was able to integrate her advocacy frame alongside additional collaboration frames, first by attributing the shift to the crisis of the pandemic, and second by showing how these additional activities would contribute to policy development in future.

One member's journey is an example of this path and I found their experience to be instructive. This member was a highly educated and thoughtful social entrepreneur who straddles the worlds of academia and nonprofit management. By their own description, Catalyst 2030 provided "the home I have been looking for" [08] and, in their interview, I found them to have a strong meaning-making frame that was related to finding a close

affinity with the global members of the network. However, as this member began to become more involved in the regional and country-level activities for Catalyst 2030, they noticed a disconnect between the satisfaction that they felt in the network and the lack of satisfaction by the local membership. With characteristic introspection, this member explored this disconnect in our interview, saying:

“My expectations have been met in that I have found a space where we are exploring together. So as far as that is concerned, I am 100% happy that I am in the right place and that my expectations have been met. Now since I became the chapter chair, I realized that my team is struggling. Because their expectations are different...so it will be unfair to say my expectations are met and yet I have a team of people who are working with me, whose expectations are not met. That’s why I’m answering the way I am answering. As a person I am therefore split between how I perceive my own satisfaction as a member and the members of my chapter.” [08]

This member went on to explain that the local members from their chapter were frustrated with long Catalyst 2030 meetings where very little action was taken, particularly related to resourcing and funding. These members, largely through their practical need for funding, had joined Catalyst 2030 primarily with the coordinated action and advocacy frames. They did not have the patience or “luxury” to spend their time devoted to social learning and meaning-making. The member recognized that their own resources—having WiFi and a quiet home with space for Zoom meetings—allowed them to come to Catalyst 2030 with a certain dominant frame. However, based on their empathy and close connection to these members, they were able to adopt multiple, different frames in order to better serve her fellow members with a sense of fairness and solidarity. This member’s experience reminded me of Gray et al. (2015, p. 119)’s observations that “In such cases, the prevailing norms of the interaction are disrupted and the interactants must reconnoiter on the spot to determine their responses.”

Trying on different frames

A third path that I observed was members ‘trying on’ different frames in an effort to continue their engagement with Catalyst 2030 in new and different ways. In contrast to the

pathway described above, members using this pathway did not necessarily commit themselves to new frames, but rather ‘experimented’ with different frames by seeing their time spent in the network as separate or distinct from their professional role. In one example, a member arrived to Catalyst 2030 with a strong coordinated action frame, which I attributed to their professional role as a portfolio manager in a large grantmaking organization. Yet, this member found that they couldn’t fully engage in the network without adopting additional frames, which in some cases felt less important to their professional goals but which they recognized as important to other members. Describing adopting the social learning frame, they said: “At the very least, one of the things that we’ve learned...is that to be a social entrepreneur is very lonely. And it’s a very hard role to be leading organizational change like this. So at the very baseline, to have a place where you can connect with others...to be able to share like that, I think...at the very least, if it does this, it’s good enough.” [09] Interestingly, this member did not let go of the coordinated action frame but rather ‘tried on’ new frames while holding their dominant frame as the ‘higher’, more legitimate frame. They continued, “But I think it has exceeded that baseline where, you know, there are great things that have happened, initiatives that would not have been able to be successful without Catalyst 2030. So that part is also exciting.” In this example, adopting additional frames allowed this member to continue to engage in the network by seeing different types of activities as legitimate and necessary, even if other activities are still more sought after and important in their estimation.

In another example, I interviewed a member who held a strong coordinated action frame in their ‘day job’ of founding and running a very large social enterprise, but decided to ‘try on’ the frames of social learning and meaning-making in their involvement in Catalyst 2030. This member approached using the new frame with curiosity and playfulness, as well as discomfort, saying “One of the things that has been really eye-opening for me to participate

in some of the General Assemblies and just check out and dive more into things...it's really very different from what I've been involved with [in my 'day job']...a very wide tent, extremely wide tent...It's just a whole 'nother place, for me, and it's not a place I'm terribly comfortable in...And it's exciting and it's powerful, and I'm still trying to get my head around like how I play in that." [44] Later, this member mentioned their feeling of relative privilege compared to other members, saying "I just do so much handwringing about how to step back and not disappear, you know?" This member's decision to approach their involvement with Catalyst 2030 through a different frame enabled them to step back from their usual role of coordinating action and rather become part of a learning and meaning-making process. They described these new frames almost gleefully: "So that's really down in the weeds in terms of the answer, but it wasn't that I wanted to join the movement. It was more, "Oh, this is about movement building – I've never been involved in that before—this is fascinating."

Trying on different frames also seemed to give some members 'permission' to be less analytical and evaluative about the direction that the network was taking, and instead enjoy some of the aspects that might instead feel enjoyable or interesting. In one instance, a member with a dominant coordinated action frame expressed their enjoyment of being in a conversation while trying on a social learning frame:

"...they were really taking two steps back and trying to look at the big picture of how does systemic change happen. I find that very enriching because I hadn't had those kind of conversations anywhere else. I think part of what I really enjoyed and enjoy is that obviously [it's] a crowd of people who care about somewhat similar issues as I do. And it's always nice ...to find your tribe... we are so stuck still all the time in the same little circles..." [16]

Although this member found the experience enjoyable and used it to justify continued engagement in Catalyst 2030, they were quick to contrast with how they would feel if they had used their more dominant coordinated action frame:

"[however] if I had a stake you know in the whole thing I would have gotten very

frustrated but now I've found it very amusing to see and interesting... On the negative side I wonder to which extent... all this seems to take quite a bit of resource in terms of human time in terms of human energy, in terms of there must be some money and the question is, is it worth it?"

The pathway of trying on frames importantly gave members the option to stay engaged even if the process did not fully conform to their idea of what collaboration 'should' look like. It also gave members space and time to evaluate the possibilities for collaboration in a non-judgmental manner, and opened up the potential for exploring and building relationships with other members even while explicit goals and activities were still unclear.

Frame mismatch

Not all frame dynamics resulted in sustained engagement by members. A fourth path that I witnessed was frame mismatch, where members were not able to find a place to realize their frame and therefore chose to disengage from the network rather than take any of the paths described above. Two examples in particular stood out for me when considering this path. I interviewed one member who was a serial entrepreneur whose organizations operated at the intersection of technology and small business development. In our interview, they displayed a strong coordinated action frame with a second, lesser dominant meaning-making frame. Early in their journey with Catalyst 2030, this member joined a collaboration that was exciting for both of their frames: it was a project with a well-defined output (coordinated action) and it had the potential to change the way lesser-heard voices were able to contribute to the SDG dialogue (meaning-making). Yet, both of these frames proved hard to realize as the collaboration unfolded and resources and relationships became strained. By their account, "teams weren't fluid" and "egos got involved", breakdowns that were incompatible with the expectations that this member had of Catalyst 2030 members. Ultimately, these perceived breaches were too much for this member to reconcile and they took a step back from his

involvement with Catalyst 2030. A second example was a member who was part of the funding community supporting Catalyst 2030. In their interview, this member presented with a dominant meaning-making frame and a lesser dominant coordinated action frame, speaking highly of the overall vision of Catalyst 2030 for achieving the purpose and priorities of these frames. However, in the working group that she attended regularly, they were disappointed that too much of the conversation was focused on “information sharing” and “affecting something...outside of them”. They elaborated:

“I think there can potentially be a risk in staying in thinking mode, like bringing everybody together. That's a bit been my observation of the [working] group. There's lots of information sharing, and that's not bad. But I don't know that it's also doing anything, I think it's a bit of an echo chamber. So that's one example maybe where there's a risk of sort of staying in that ideation mode....I was thrilled there were people doing the kind of thinking...But it just felt like a lot of what I heard before, and I didn't really know what we were supposed to do with it...I wanted to see the [members] around the table, commit to changing their practice and doing something different in their circles. And I wasn't seeing evidence of that, I was seeing evidence of [members] affecting something beyond outside of them. And I'm like, we do enough of that. It's actually us that needs to....And I was like, wow, then this is not, it's just not what I needed. So we just didn't listen in every time.” [24]

While this member acknowledged that they needed to spend time visiting other working groups to potentially find a better fit, they were also absorbed by the changes that were currently underway in her own organization, leaving them little time to attend more meetings. Therefore, they chose to “not listen in every time” and slowly disengage from regular involvement in the network.

As laid out in these descriptions, polarities, and dynamics, collaboration frames were important in determining how heterogeneous actors arrive and function within collectives such as Catalyst 2030. Organizational actors arrived to collectives with common experience sets, but with divergent frames about how their work would unfold together. Yet these frames were not static or singular: they shifted and changed based on the experiences and choices that members made when they interacted with other members in the network. They were also

subject to polarities which could create tension and conflict. Through “struggles and negotiations” (Gray et al., 2015, p. 116), members interacted with one another, built relationships, and found ways to collaborate despite frame differences, which result in diverse ‘interaction rituals’ (Goffman, 1967) and associated meanings.

However, as I will describe in the next chapter, these constructive interactions and relationships were not guaranteed simply by coming together. In cases where relational practices encouraged constructive engagement, these dynamics encouraged members to stay engaged with one another, allowing multiple frames with their distinctive polarities to co-exist. I will explore some of the relational practices that allowed these “struggles and negotiations” (Gray et al., 2015, p. 116) to unfold constructively, thereby sustaining collaborative work despite its ambiguity and even adversariality. I will then weave together these constructs (experience sets, collaboration frames, and relational practices) to shed light on how collective agency to drive institutional change was derived within the heterogeneous collective addressing GCs.

7. Findings 3—Relational Work of Heterogeneous Collectives

In the previous two chapters, I explored how heterogeneous organizational actors in a collective addressing Grand Challenges (GCs) experience the institutional environment and initiate collaborative work to address these institutional factors. I described how these actors come together with common experience sets (fragmentation, time precarity and path ambiguity) but different collaboration frames (coordinated action, advocacy, social learning and meaning-making). While experience sets shape actors' desires to collaborate and provide a basis for organizational actors to work together, collaboration frames instil a plurality of purposes, priorities, principles and orientations ascribed to collaboration. These frames are also subject to two polar orientations: the action/urgency polarity and the time-giving/sense-making polarity. Yet these frames are neither static nor singular; actors engaged in collective work are constantly shifting and changing their frames as part of their work together.

For Catalyst 2030 members, the experience sets triggered by GCs motivated them to come together to resolve the experiences of fragmentation, time precarity and path ambiguity. When engaged in the network, members arrived with dominant collaboration frames and then changed and modified them based on interactions they were having within Catalyst 2030 and the relationships that members were building through the network. While some members maintained their original frames by choosing to work in groups that held the same dominant frame (or disengaging altogether), others actively shifted their frames to accommodate and 'try on' the frames of other members. Some members also held multiple frames simultaneously, and applied them intermittently when engaging with different sub-groupings in the network.

Within a heterogeneous collective such as Catalyst 2030, I observed this dynamism of collaboration frames as a form of *relational work* that contributes to developing collective agency toward institutional change. Catalyst 2030's network structure and members'

activities actively support this relational work, encouraging a balancing between the two polarities of reflection (time-giving/sensemaking) and undertaking (action/urgency), even while individual organizational actors experienced their own changes. I observed that this interplay creates a ‘balancing act’ of reflection and action which maintains heterogeneous actors in their collective relationships with one another to address GCs. This description of relational work is in response to the third research question:

- What types of relational practices emerge amongst heterogeneous organizational actors operating within complex, uncertain and evaluative contexts, such as GCs, and how do these practices contribute to the construction of collective agency?

In this chapter, I will explore three types of relational work—*legitimizing heterogeneity work*, *wayfinding work*, and *brokering work*—that allow for this balancing act to continuously operate while sustaining the engagement of heterogeneous actors in the network. In the Discussion chapter, I will propose that these forms of relational work are a key contributor to the construction of collective institutional agency.

7.2 Observing Relational Work

In their comprehensive overview of social-symbolic work, Lawrence & Phillips (2019, p. 203) point out that “The relational dimension is central to our conception of social-symbolic work, and yet research on institutional work tends to leave this dimension implicit or overlooks it entirely.” They consider that this oversight could be due to the kinds of actors that have been studied, referring to Hampel et al. (2017, p. 572)’s observation that “existing research on relational institutional work has focused primarily on the work involved in influencing like-minded actors from the same field”. While existing studies have focused on how homogeneous collectives perform the relational work of (1) gaining followers for a specified cause and (2) acting in concert with others, both formally and informally, much less

is understood about how heterogeneous actors with dissimilar goals and roles can work together productively (ibid., pg 572).

Catalyst 2030 provides a window into the relational work that is performed when heterogeneous actors come together to shift “institutions that matter” (ibid., pg 579) while addressing GCs. In my study, I observed that members of Catalyst 2030 perform relational work that is similar to that of homogenous collectives—for example, growing the membership base and coordinating goal-directed projects. However, during the study, I also observed forms of relational work that are different than homogenous collectives. These forms of relational work are less about growth and coordination and instead aim to keep actors in continual relationship with one another in light of their heterogeneity. Interestingly, this work seems to be focused on the challenge of growing the network while expanding and preserving its heterogeneity. Ferraro et al. (2015, p. 374) building on Verweij et al. (2006) consider this type of work to be essential when addressing GCs, since it creates the requirement that “diverse and heterogeneous actors take seriously the different types of stories that are in circulation, so that no voices are excluded, and any contestation is harnessed in constructive if “noisy” ways.” Ultimately, the aim is to “prevent premature termination and to sustain engagement” and if they become competitive “then they will have failed” (ibid., pg 374).

As I explored in the earlier chapter describing the study site, Catalyst 2030 exhibits heterogeneity on two different levels: organizational and individual. Within these two levels, members of Catalyst 2030 have many diverse features contributing to a group that has “a wide diversity of understanding and perspectives related to collaboration” [33] according to one member. When addressing GCs, this heterogeneity is desirable: it means that members are better able to grasp the complexity, uncertainty and evaluativity of GCs based on their collective experience. However, as described in the previous chapter, diversity also comes

with different approaches and expectations about how the collective work will unfold. In many cases, these differences can pull members toward one of two polarities: the time-giving/sense-making side and the action/urgency side. ‘Tipping’ toward one side or another— or becoming “competitive” as Ferraro et al., (2015, p. 374) term it—can be detrimental to the work of addressing GCs. If the collective becomes too focused on the action/urgency polarity, it means that certain members, experiences and approaches are excluded or minimized from the collective work. On the other hand, if the collective focuses too heavily on the time-giving/sense-making side, members will never experiment or undertake discrete projects to put the diverse knowledge and experiences into action. Jay (2013, p. 137) laments:

“As a result (and in contrast to the inertia and stasis endemic to organizations conforming to homogeneous institutional fields (Dimaggio & Powell, 1983; Hannan & Freeman, 1984)), excessive change may characterize the life of organizations that grapple with these multiple influences. Such instability and flux could deplete organizations' capability to solve complex problems, particularly if change leads to the collapse of hybridity and the dominance of one logic (Kraatz & Block, 2008).”

In observing Catalyst 2030, therefore, I became attuned to two simultaneous aspects of relational work within heterogeneous collectives. The first aspect involves the relatively well-studied work of identifying ‘common cause’ to conduct collaborative work that influences institutions. The second aspect is no less focused on institutional work, but it rather maintains the heterogeneity of the collective, harnessing both the common experience sets and the divergent collaboration frame polarities to keeps the group together *in spite and in light of their differences* while they learn and act in concert. This relational work is crucial as it keeps a heterogeneous group in continual relationship with one another, maintaining repeated interactions and a balancing act between the diverse expectations, perceptions, and behaviours amongst members, ensuring that there is a healthy equilibrium between organizational actors so that no single actor’s approach becomes dominant. Importantly, this

work is not a process with a start and an end; rather, it is an iterative, continual set of relational work practices that members enact in order to keep the collective healthy and whole while it performs its institutional work.

7.3 Relational Work in Heterogeneous Collectives

In the section below, I will outline three forms of relational work that members of Catalyst 2030 performed on an ongoing basis to maintain and even grow their heterogeneity while keeping a healthy balance between the two frame polarities: the action/urgency side and the time-giving/sense-making side. The three areas of relational work I will describe are: *legitimizing heterogeneity work*, *wayfinding work* and *brokering work*. These three types of work operated together to create a balance of reflection and action that sustained engagement amongst heterogeneous organizational actors in Catalyst 2030. These interactions were stabilizing, maintaining a plurality of frames that allows for continuous learning and solutions-finding amidst complexity, evaluativity, and uncertainty.

To describe the interplay of the three forms of relational work, I will relay a conversation that I observed during an in-person convening of highly active members of Catalyst 2030. This conversation occurred during a particularly contentious part of the convening where members were at odds about how to fund the ongoing work of the chapters and sub-groupings. In an effort to bring the group back together, four long-standing members from different backgrounds and sectors had a passionate conversation in front of the entire group about why they believed that Catalyst 2030 was important and why they remained engaged in the network.

(The conversation is synopsisized since it is taken from my handwritten observation notes during an unrecorded session.)

MEMBER #1: The most valuable and fascinating part [of being in Catalyst 2030] has been the one-on-one conversations where we really understand and appreciate what our peers are doing.

MEMBER #2: To add to that...the chance to understand what we're all about. We talk about that but this is [the most important thing about Catalyst 2030].

MEMBER #3: We're all "do-ers". That's very unique. We should be able to use our collective data to set an agenda for the world.

MEMBER #2: This is a place where I can have conversations - political, uncomfortable - that I can't have in other places.

MEMBER #4: I want to emphasize this [the statements above]. Without an hour with each person, I can't really understand what they do. It's a challenge that we need to address. [To Member #1, referring to a series of conversations they had in the year before]: You don't even know that you were the inspiration for [my organization's] response to COVID that was even written up in a journal.

MEMBER #1: And I wish I had more time to do those chats.

MEMBER #4: But it was what changed everything!

There is a lot happening in this short conversation. First, I want to draw attention to the common experience sets and the different collaboration frames that were in evidence during this exchange. In this conversation, Member #1 had a dominant social learning frame and Member #2 had a meaning-making frame. These members were eager to lift up the value of deep conversations with fellow members and how these conversations help them to see the big picture of "what we're all about". Member #3 interjected with a call to the common experience of the members ("we're all do'ers here") and framed their work with equally dominant coordinated action and advocacy frames. They could see that these conversations were revealing important strategies that needed to be shown more broadly to the world, and they believed that this valuable contribution was important to highlight to their fellow members. Finally, Member #4 drew upon multiple frames. First, they emphasized a social learning frame, stressing that the time spent in conversation with members was extremely valuable but challenging, because it was time-consuming. They then emphasized a

coordinated action frame, revealing that the time she spent with Member #1 in conversation was significant because it allowed them to change the entire course of action for their organization (“it was what changed everything!”). It is worth noting that following this conversation, the mood in the room shifted considerably. In my notes, I wrote “...lots of murmuring, agreement, a sort of collective moment where everything is feeling in sync.”

In this brief conversation, the four members of Catalyst 2030 showcased the three forms of relational work that drew upon their common experience base while mediating between collaboration frames, ultimately maintaining their feelings of commitment to being in the network. The first form of relational work is *legitimizing heterogeneity work*, where members forge deep connections between heterogeneous actors in order to expand and endorse a broader range of institutional possibilities, particularly non-dominant perspectives. This type of work was performed when three of the four members (#1, 2 & 4) lifted up the value that they received through connecting to the diverse membership base and spending significant time getting to know their perspectives, even when they found it uncomfortable. The second form of work is *wayfinding work*, when members drive groups of members toward concrete action and shared agendas by molding or shaping a set of actions that incorporate diverse ideas and perspectives in the group. This type of work was performed by member #3 who picked up on the energy of the moment and proposed how these learnings could lead to a common agenda and concrete action in the face of urgent needs. Finally, the third form of work is *brokering work*, a type of work that ensures repeated and constructive interactions between heterogeneous members in the network. Member #4 performed this type of work by bringing up the substantive concern that members needed ways to interact with each other in these constructive conversations and highlighting it as an explicit challenge for the group needed to address. When these three forms of relational work—legitimizing heterogeneity, wayfinding, and brokering—are enacted by members, they constructed the collective

sensations that resonated in the room: appreciation for the diversity of their network and the different perspectives that are represented, consideration of concrete ways to bring this energy and diversity into action, and attunement to the ways in which their repeated interactions will address GCs.

In the following three sections, I will describe these forms of relational work in more detail, highlighting some of the key practices that I observed comprising each form of work.

7.4 Legitimizing Heterogeneity Work

The first type of relational institutional work I will describe is *legitimizing heterogeneity work*. Legitimizing heterogeneity work is performed by members who seek to forge deep connections between heterogeneous actors in order to expand and endorse a broader range of institutional possibilities, in particular non-dominant perspectives and practices that are currently less represented in the institutional field. By legitimizing, I mean that members were experimenting with, practicing, and even enforcing new rules and norms about how non-dominant perspectives and viewpoints would be incorporated into the conceptualization of the GC, both within the collective (to each other) and external to the collective (to actors in the broader field). Legitimizing heterogeneity work is derived from the two frames that make up the time-giving/sense-making polarity: social learning and meaning-making. These frames are conducive to divergent thinking and exploratory activities. As described in the previous section, those who were operating with a dominant social learning frame were seeking to connect with diverse actors for learning and understanding. They were eager to align around curiosity and learning, and they had a deep respect for different points of view. Ultimately, they sought to co-create solutions with others and they did not believe that any one member should push their solution onto the group. In a similar divergent and exploratory fashion, those actors who were operating with a dominant meaning-making frame were seeking to

cohere around shared meanings and values that were discovered as a group. They were hoping to align around a ‘bigger picture’ perspective and they insisted on working together to align around shared values. These actors liked to model and practice these values within the collective and they believed in ‘being the change’ before they actively sought to change those on the outside.

In the following section, I will describe some illustrative practices that were emblematic of legitimizing heterogeneity work. When Catalyst 2030 members performed legitimizing heterogeneity work, they sought out members with different backgrounds and experiences, and encouraged the collective to expand to include these viewpoints. Members with these frames tended to explore the network for new information, perspectives, data and experiences that were less represented in the institutional field. These new perspectives may have been in conflict with dominant practices and beliefs, however, the work of legitimizing heterogeneity worked to reduce this conflict to more manageable feelings of discomfort or curiosity. I observed that legitimizing heterogeneity work used norms of humility and ‘levelling’ that seemed to dissipate the need for members to ‘dominate’ with their existing perspectives. I also observed that members performing legitimizing heterogeneity work actively slowed down activities and processes, encouraging more listening and discouraging dominant voices. When this work was being performed, urgency was kept at bay and temporality was suspended while exploring various options and possibilities.

Democratizing

One of the primary ways Catalyst 2030 members performed legitimizing heterogeneity work was by exploring the sector for new perspectives and ‘democratizing’ the inclusion of these viewpoints, particularly those that were less represented in the dominant networks for social entrepreneurs and innovators. This involved exploring the network for new

perspectives that challenged existing viewpoints; inviting less-dominant members into leadership positions even when this shifted power dynamics; stepping back in conversations to ensure that many voices were heard; and being receptive to criticism and challenge.

In the early days of network formation, Catalyst 2030 members reached out to their closest colleagues, gathering together ‘elite’ social entrepreneurs and funders from their awardee networks. Many members identified the quality and closeness of the membership as one of the main reasons that they joined the network. However, while these original networks created a sense of pride and belonging, they were also insular and largely committed to activities that had been ‘sanctioned’ by powerful philanthropists and business leaders. Many members felt that the network needed to expand beyond these elite networks to include actors from more diverse backgrounds. As one member described:

“I think that those networks are very exclusive and despite speaking a language of inclusion, I think are inherently [elite]. Skoll is a very elite event and WEF is a very elite event. And, Ashoka, less elite and a little bit more grassroots, but it comes with a certain...smugness about it...and so, being part of something that is social entrepreneur driven without coming with that baggage...seemed interesting to me...it came with that spirit of this is not about me, this is about...being in service of the movement. It being about the collective and the collective intelligence and we can bring these people together...It was: this is bigger than us.” [22]

Not all members were enthusiastic about expanding beyond the ‘elite’ social entrepreneurs. For members who joined in order to create bonds with fellow award-winning social entrepreneurs, the expansion to non-elite actors seemed distracting from the purpose of driving urgent and global change. While most members were more modest in their desire to stay ‘exclusive’, one member articulated this feeling in a very direct way:

“...if it comes to real change, 10% of the people are the top talent, they will create 90% of the change...A players affect A players, B players affect C players...for the long term sustainability it’s important that we try to find a way to be inclusive, but still have A players there...in this NGO world a lot of folks that are a bit hanger-by, right. And I noticed that the real movers and shakers are pretty allergic to these folks. So I think they should stick where it’s social entrepreneurs...otherwise the risk is too high that this all become just another political talking show...the result will be that the 10% will switch off. The 10% A players will switch off.” [40]

Legitimizing heterogeneity work counteracted these exclusionary tendencies by valuing and ensuring that all forms of knowledge were utilized within the network. The practice of democratizing included mining the network for new perspectives and viewpoints with which to grapple, bringing them to the fore and validating them by incorporating them into the common knowledge base of the network. This work was important in a heterogeneous network like Catalyst 2030 because it ensured that new perspectives—which might seem like distraction to members operating with the action/urgency polarity—were included rather than sidelined. Through the practice of democratizing, members encountered or arrived with ideas that were currently out of the mainstream, spent time socializing them through the network, and then ensured that these new ideas were presented to members or external colleagues as new possibilities. In the process, non-dominant ideas which may have initially seemed less valuable or even dangerous or conflictual became part of the range of prospects.

For example, one of the members of Catalyst 2030 who I interviewed was the co-founder of a technology organization that had ties with a number of well-known philanthropists and tech entrepreneurs. Their organization was one of the so-called ‘elite’ organizations that had been the recipient of SE awards over many years. Despite belonging to this exclusive group, in their time with Catalyst 2030, they used a social learning frame to spend time exploring the network and getting to know many different members with diverse viewpoints of the sector. In their reflection, this exploration had been particularly fruitful and changed the way they viewed their organization and its positioning in the field. With this new orientation, they had started new conversations in their organization that challenged the status quo of focusing solely on technological solutions. They described this in detail:

“[Catalyst 2030 has] opened my mind to really how the world works frankly or could work. How my organization fits within that or should fit...So I’m going to go into this draft discussion [in my organization] and say, listen, you know we can’t be in this silo. So this is kind of conversations I probably would not have had two years ago. So it’s really healthy that...we’re not looking at...our umbilical constantly and you know we pride ourselves as [an

organization with connections to]...some really, really high level people. I mean my co-founder...worked with [several prominent tech entrepreneurs]. He comes from a very astute and smart environment in...[and] I would consider ourselves quite smart in terms of how we approach partnerships...But even then I don't think we've done it adequately you know and that's what I've learned from observing and listening and learning from people around the same...You've got to work it and ask the right questions and listen if you want to gather those learnings and those insights...So it's about bringing your organization and your key decision makers with you..." [15]

Democratizing involved inviting in other viewpoints, even when these new perspectives changed the power dynamics of the network. For example, when the network began to evolve to include regional chapters, members of the Governing Council (GC) recognized that the council no longer fully represented the expanding membership. As a result, the GC made a significant decision to change the structure of the council and include representatives from each of these chapters (GC Meeting Minutes, April 2021). These new Council members were introduced to the existing members through an exercise called 'speed dating' (GC Meeting Minutes, May 2021), designed to allow new members to quickly become an integral part of the group. Over the coming months, I observed that the group's orientation shifted from being strongly anchored to North America and Europe to instead becoming more conscious and responsive to the growing membership base in 'Global South' regions. In particular, the new structure spawned several discussions about funding, connectivity, and language, with more discussions and decisions devoted to ensuring that members with less resources could participate in a meaningful and influential way.

Importantly, I noticed that members practicing democratizing would purposefully monitor conversations to make space for diverse viewpoints, even if they were not the 'moderator' or primary presenter. In my observations, members practicing democratizing would take care to notice if certain members had not yet contributed to a conversation, inviting them to add their perspective if they had not yet done so. In large groups, members using democratizing modelled and paid attention to respectful turn-taking, deferring to other

members who made motions to speak if they had not yet contributed to the conversation. In some cases, this practice involved self-reflection on positionality and taking a “step back” as evidenced by this quote:

“As a white male of relative privilege in a Northern country, not to mention the US, I just do so much handwringing about how to step back and not disappear, you know? And how do you wield influence and be helpful and useful, have a life that continues to be filled with usefulness... And that’s what I find so, I’m awestruck by the representation of organisations and people and voices through Catalyst 2030 which is just amazing. I just don’t quite know what to do with it yet.” [44]

Finally, democratizing also involved members being receptive to challenge or criticism. One member with a social learning frame who was the founder and leader of a development consultancy described how they felt having too much acceptance of their own opinions could be dangerous, and instead had become more welcoming of diverse opinions. In contrast, in Catalyst 2030, their viewpoints were contested, which they described as “awesome”. Over the year and a half that they had been part of Catalyst 2030, they described changes that they witnessed while being part of conversations with people with a diversity of viewpoints:

“...the reality is I see change. I see people have changed their mind. I mean some little, some more, some more in other areas, whatever, but I can see it because I’ve seen these people for the last year and a half, right. I’ve seen myself in the last whatever two years and I think I’ve become more accepting of diverse opinions and in my own little cubbyhole sometimes that is the danger is...too much acceptance of my views...in Catalyst they don’t care, which is awesome...I might sit there and scratch my head for a second, but then you come out and you have a much better picture of what I’m, [thinking, and] which of those makes sense and you know the kind of acknowledgments I get or the lack of acknowledgment which is in itself a signal sometimes. So it’s a very good sandbox for ideas I think.” [04]

In summary, actors within Catalyst 2030 employed practices such as democratizing to expand and explore the perspectives that are less represented in the institutional field and bring them to the fore. This type of work ensures that the collective does not merely become a more amplified voice for dominant perspectives held by powerful members, but rather a place of experimentation and exploration where heterogeneity is preserved and enhanced.

Humbling

Another way that Catalyst 2030 members perform legitimizing heterogeneity work was through a practice that I have called ‘humbling’. This work was practiced by establishing new norms for how members related to one another that broke down existing hierarchies and barriers to connection. In Catalyst 2030, I observed that members were encouraged to downplay their organizational affiliations and personal accomplishments, instead focusing on the broader aspirations of the network. This created a sense of ‘leveling’ whereby members are able to connect to one another outside of traditional hierarchies and in service of the greater GC cause, rather than through recognition of their positionality or achievements. Similar to democratizing, I also noticed that members operating with this norm of humility rarely dominated group discussion with their own viewpoints, but rather left space for many perspectives to emerge.

One example where I observed modeling humility was introductions. In a network of thousands, introductions were a ritual that was performed on a regular basis. In my experience of professional networks, members are typically encouraged to speak about their organizational affiliations and promote their work and accomplishments. This is often accomplished through the standard introduction process where participants are asked to provide a short synopsis of their role along with a description of their organization’s work. This results in an immediate hierarchy: members ‘locate’ each other in the context of the professional sphere and establish who is more ‘important’ based on outsider labels (roles and achievements).

At Catalyst 2030, I quickly noticed that this type of introduction was rarely used. While new members often introduced with their professional affiliations, longer-standing members led with their connection to Catalyst 2030 and their interest in a topic or issue, rather than to a specific organization. In meetings and convenings, I would often have several interactions

with a member before I would hear about their professional affiliation. Even when members identified their organizations, this would often quickly segue to a broader topic such as the GC(s) they were passionate about addressing. Organizational roles were rarely discussed and senior leadership roles were rarely acknowledged or flaunted. In fact, I would often find the need to do a surreptitious internet search to figure out a member's organizational affiliation and position.

The active discouragement of self-promotion and organizational affiliation could be disorienting to members when they first joined the network. One member shared their early experience at Catalyst 2030:

“At one point I felt okay, so this is like every other thing I get involved with where I talk about [my organization]. But then I felt that everybody kept talking about don't promote your work, don't promote yourself. This is about something bigger. So, I shied away and I [felt] really bad that I was talking about [my organization] - that all of that's wrong. But I couldn't get my head out the where do I position myself? Like, how do I behave? If I don't talk about [my organization] then I should talk about broader stuff. But then, I'd go in another meeting, somebody would be talking only about their own work....I feel, okay...who's getting it wrong, me or them? And I felt shy to ask because everybody seemed to know what they're doing. Except me.” [03]

They then went on to explain how the ‘anonymity’ of people's professional affiliations created a sense of equality:

“Everybody was there. I mean, retrospectively, you have all these people who apparently were names I didn't know, later. And whether they're well known in their field, or this is a big journalist or that guy. I never knew who [prominent member] was, by the way. So, yeah he was just another guy. You know, I didn't know anyone...it was just...everybody expressing their opinion, and talking about and we're all social entrepreneurs. I later realized there were funders there. I didn't realize there were funders and foundations. And so, to me, I think...that was the levelling field, that we're all equal.” [03]

While there were certainly members who were promotional about their work, this type of self-promotion was subject to admonishment, a form of humbling. One member who promoted their work heavily on the WhatsApp group was derided by other members in private conversations which served to discourage this type of self-promotion by other members. A couple of members described to me a ‘success story’ of another member who

frequently spoke over others and touted their accomplishments, but had recently begun to listen more and talk less. There seemed to be a tacit belief amongst Catalyst 2030 members that self-promotional behaviour was detrimental to constructive engagement in the network.

Humbling as a practice involved members of Catalyst 2030 connecting with each other outside of the traditional hierarchies that govern interactions. Members practicing humbling welcomed and encouraged fellow members to reach out directly for meetings and exploratory chats, rather than using formal route of being connected through professional linkages. Many members revealed their astonishment and delight that they were able to successfully connect with so many ‘high profile’ and senior members of sectors within and through the network, and that these connections had led to active engagement. One member expressed surprise that leaders of important organizations were now willing to talk to her and open up their connections to help her make progress on important projects:

“You know, and right now we feel that we can call [senior leader] and talk with [him]. I met [this leader], I think four years ago, and I never think in my mind to call him for anything...[he] is like another level...Right now, I feel that I can send an email, I can call them. And they ask me back and not because I am who I am, it's because I am part of this movement, they feel that they are part of the movement.” [42]

This member went on to describe a global crisis situation that they were addressing, and noted their own comfort reaching out to senior members within Catalyst 2030 to make the right connections with public media and political decision-makers. Through this story, it was clear that Catalyst 2030’s norms of humility had created an environment where younger or less connected members felt a sense of ease in reaching out to well-connected, senior members to gain access to their expertise and networks.

When members from the ‘elite’ networks practiced humbling, it encouraged members who did not have such status to be active members in the network and not subconsciously defer to members with greater seniority. These members may have had less exposure due to their geography or positionality, and therefore brought in new perspectives that challenged

dominant thinking and practices. Importantly, I observed that these norms of humility created the possibility for any member—even those without the accolades of outsiders—to assume leadership roles and influence the network. It also forced members to listen carefully to all contributions, rather than defer to those promulgated by members with more senior sector roles. While I observed that hierarchies still formed over time, the members who moved into leadership roles were not necessarily those who had the most recognition in their fields. Instead, in many cases, leaders emerged based on the value of their contributions and their dedication to the network. In an ironic twist, a few of these new leader members had even been recognized with awards from the ‘elite’ networks due to their rise within Catalyst 2030.

Upon reflection, I venture that actors within Catalyst 2030 practiced humbling as a way to ensure that diverse actors were able to assert their ideas, assume positions of leadership and make upward connections that broke down existing hierarchies that existed outside of the collective. This practice supported the broader work of legitimizing heterogeneity by ensuring that a broader range of institutional possibilities were present within the collective and that members—including those from more dominant positions—were likely to interact with these possibilities on a regular basis, thereby growing the potential for their inclusion in the institutional field.

Suspending Urgency

A third way that members in Catalyst 2030 perform legitimizing heterogeneity work was by practicing what I will call *suspending urgency*—purposefully slowing down activities and encouraging repeated interactions and listening across dimensions of diversity and heterogeneity. Through this practice, urgency was kept at bay so that members could get to know each other more fully before determining how they might work together. While members got to know each other, many options and possibilities could be explored, not just

those which emerged early on or from the most vocal members. This practice involved a significant investment of time and was likely to be challenged by members who ascribe to the action/urgency polarity, but this challenge was often met by those who held up its merits and continued to practice it on a regular basis.

In the early part of this chapter, I related the conversation between four members that alerted me to the relational work being performed in Catalyst 2030. In this exchange, two of the members related how they had spent significant time meeting with one another to get to know each other's work. Both members found these conversations to be extremely valuable and, in fact, one member expressed that this had "changed everything" about their organization's trajectory. Later, when I was able to interview one of those members, they more fully described their decision to engage in repeated, deep and time-extensive conversations with fellow members:

MEMBER: It has changed me and I find that immersing myself—that's the best three hours. If I tried to over-analyze what I am going to do with that time, I spend more time analyzing and less time listening. So I've just gone and I think on hindsight it was one of the most useful things for me to understand and build...within Catalyst. I realized that there was less listening happening. What was happening earlier that turned me off was people would come, talk about what they doing and then stop and everybody else would come, take turns, talk about what they doing and then stop. It was just like a marketing machine of some sort...

ME: This was at the beginning of Catalyst?

MEMBER: Yeah, the beginning of Catalyst. Less so now, less so now, right and I think that's a very important change and I might say that in my own small way maybe I contribute[d] to the idea of us spending more deep conversation time and listening to each other. I wasn't professing it. I was just doing it and maybe I was one of 100 people doing it or so I don't know. I don't know how many people.

They went on to describe their interactions with the member who had credited him with changing the trajectory of their organization:

"...that was mighty generous of her to say. I didn't know that they had taken that [decision] but I remember spending...eight to 10 hours with her and our team because I think they cared about what they were doing. I could see it and I said okay I have my time, I will give it..." [04]

One of the things that I found interesting about the practice of suspending urgency was its informality. Although the network had formal activities to encourage members to get to know one another, such as Conversation Cafes and the Buddy System, these activities were less commented upon by members. Instead, members were more likely to cite conversations that they had initiated on their own with a significant investment of time and effort, and often without the guarantee of something in return. For example, one member described how they eventually built a number of partnerships through a series of conversations that were about “expanding and learning”. They said:

“...everybody who said something that I thought was interesting, I reached out to them [and] asked to meet them. So, I met with a lot of Catalyst members, because after I'd hear them whether in the General Assembly or in the working group, I emailed them separately, I ask them: Can we meet and just talk, chat, share resources, talk about my work, listen to what they have, whether that developed into something or not, was okay with me, but it was about, you know, expanding and learning.” [03]

This investment in time was not to be taken lightly. In my observations and interviews, the concept of time and its scarcity was continually raised. This situation was described in the earlier section which described the experience of time precarity. With time precarity as a common experience set among members, I was reminded how ‘radical’ the practice of suspending urgency could be for members. In the face of GCs that felt urgent and unsolvable, the prospect of taking time to deeply understand the work of fellow members could feel insufficient and costly. However, by modelling the practice of suspending urgency and extolling its value to others, members of Catalyst 2030 had made this a significant—albeit informal—practice in the network.

I believe that suspending urgency was a critical part of legitimizing heterogeneity work, largely due the value that is placed on time within the context of GCs. When Catalyst 2030 members gave of their time freely, with no expectation of reward, this signaled to fellow actors that heterogeneous perspectives and viewpoints had validity and worth. Furthermore, when this practice was normalized within the collective, it provided ‘permission’ for others to

also suspend their busy-ness and take the time to more deeply understand the GCs and their institutional field. When urgency was kept at bay, the ‘taken-for-grantedness’ of approaches could be unveiled and members were able to critically evaluate the norms, beliefs and values that are held uncritically. Therefore, the practice of suspending urgency supported the broader work of legitimizing heterogeneity, ensuring that time and energy were spent *outside* of the structured environment to which organizational actors were exposed and come to value non-dominant ways of thinking and believing. To the members, this felt like time well spent, since it provided the necessary critical exposure that revealed institutional components which would eventually become objects of institutional work.

7.5 Wayfinding Work

The second type of relational institutional work I will describe is *wayfinding work*. Wayfinding work was derived from the two frames that made up the action/urgency polarity: coordinated action and advocacy. In contrast to the other two frames, these frames led members to convergent thinking and action-undertaking activities. As described in the previous chapter, those who were operating with a dominant coordinated action frame were seeking to get things done with concrete actions. They were eager to align around roles and coordination, and they drove toward shared goals and decision-making. They valued efficiency and solutions, with a focus on process and skills. Similarly action-oriented, those members who were operating with a dominant advocacy frame were externally focused, hoping to influence outside actors to adopt enabling policies. They sought to align with fellow members around a shared agenda and gain a ‘seat at the table’. These members saw power in numbers and believed it was important to present a ‘united front’ to outside audiences rather than a plurality of approaches.

When members utilizing these two frames interacted in the network, they performed

wayfinding work by driving groups of members toward concrete action and shared agendas. While members with these frames valued diversity, they saw it as a source of ‘raw material’ to be fashioned together to create a way forward. While at first I saw these aims as driving toward consensus and compromise, my deeper observations made me realize that instead, this work was oriented around molding or shaping a set of actions that incorporated the diverse ideas and perspectives in the group. Wayfinding work used norms of efficiency and exigency to urge fellow members toward eliminating uncertainty, making decisions, and taking action. I observed that members performing wayfinding work would often appeal to ‘good over perfect’ and the idea that actions were ‘experiments’ rather than final products. In contrast to legitimizing heterogeneity work, wayfinding work activated urgency, using milestone events and arbitrary deadlines to force selection between various options and possibilities.

Assembling

One of the ways that Catalyst 2030 members performed wayfinding work was to ‘mold’ a set of diverse ideas and perspectives into composite actions and messages that encapsulated the group’s collective ideas. I decided to call this work ‘assembling’ since it involved a process of seeing the way different ideas fit together and transforming this seemingly disparate set of ideas into a useful, composite action. I observed this type of work continuously, whether it was carefully crafting terminology to be inclusive of all members, writing reports or petitions that captured nuances of multiple perspectives, or developing action plans that incorporated multiple paths rather than a single path forward. At first, I thought I was observing the practice of negotiating, in which members would arrive with a stance and slowly ‘win’ their fellow members to their point of view. Then, I considered whether the practice was rather a series of compromises, where members would concede or give up pieces of their arguments to arrive at a final conclusion. However, neither of these

more familiar practices seemed apparent in the meetings that I attended. Instead, I slowly began to realize that, although members did arrive with perspectives and opinions, a subset of members were carefully working, often in the background, to craft these views into a coherent whole. Ultimately, when this work was successful, the resulting message or course of action reflected the nuanced and complex viewpoints of the group, rather than the perspectives of just one or two more influential members.

In my observation, this work required significant skill and patience, and, in some cases, this practice seemed more discursive than relational. For example, report writing was one of the primary ways in which Catalyst 2030 members would assemble their collective ideas into a coherent whole for external consumption. One member described crafting a report that included 60 authors across the network, saying it “nearly finished me...this was supposed to have been a collaborative effort but people really weren’t talking to each other. They were only talking to the strain that they were working in.” [02] Despite the difficulty, the report emerged as a significant milestone for members who felt that their ideas had been represented in the context of the larger whole. Although this was certainly a discursive feat, it was, in fact, a sophisticated relational feat as well, since it required facilitating a multitude of interactions and cemented many of the early relationships upon which the collective was founded.

Skilled facilitation toward joint report writing was just one example of the practice of assembling. In another example, members performed this practice when they repeatedly met in a Working Group (WG) that was devoted to increasing the number of collaborations in the network. The chair of this WG described the process (which she dubbed ‘collectivisms’ and ‘collective intelligence’) that led them to their ideas:

“...so I chaired the collaborations working group and it was a great group and we did a lot of work and we did a lot of work through collectivisms and nothing that emerged from my group was something one person thought of. It was always one person with the idea backed by the other, other, other. So I think collective intelligence in action, very close, and we came

up with some very great ideas...” [07]

Members also performed this practice in meetings when confronted with a crisis that required careful messaging from the network. For example, in one Governing Council meeting that I reviewed by video recording, the network’s leaders were confronted with the question of how to respond to the outbreak of violence in the Middle East. With the conflict affecting a number of members directly, some of the leadership felt that they needed to make a strong statement about the conflict. Other members were less enthusiastic about this action, noting that many humanitarian crises and conflicts were occurring around the world and singling out a specific instance would not adequately represent the diversity of the network. Over the course of a long and passionate conversation, the group emerged with a multi-faceted set of actions. According to the minutes of the meeting, the group tasked one member with crafting a statement that would condemn “all violence and hate... This statement will not be relating to one specific conflict but to all.” The minutes went on to emphasize that “Catalyst 2030 is a network that stands for peace, human dignity, human creativity, and collaboration, understanding, and dialogue placing people and nature at the center.” Additionally, the group decided that several members would host spaces devoted to dialogue and community-based solutions regarding the Israeli-Palestinian conflict, as well as spaces for general dialogue around other humanitarian crises and conflicts. (Catalyst 2030 GC minutes, 18 October 2023) This outcome was a quintessential example of assembling: rather than consensus or compromise, the group amalgamated several possibilities that emanated from this diverse group, resulting in a set of messages and actions that were a wholly new creation.

Experimenting

A second way that members performed wayfinding work was by proposing small actions

that served as short-term ‘experimentation’ rather than decisive, long-term action. In WGs and event committees, I often observed that moving out of discussion mode and into role definition or decision-making was prefaced with non-committal language, such as ‘Let’s try this for now...’, ‘We’re still in learning mode...’, or ‘If you have concerns, let’s meet after...’ By couching decisions and actions in exploratory, non-committal language, members with action/urgency frames were able to guide their fellow time-giving/sensemaking members into action without shutting down the possibility for further learning and reflection.

I observed a specific example of this practice quite closely when I attended the meetings for a newly-formed task force for awarding small grants to WGs. The formation of the task force was the result of many months of fraught discussion between two groups of members: those who felt that WGs should receive funding from Catalyst 2030 to assist with coordination, and those who felt that developing a funding stream within Catalyst 2030 would be against the values of the network. Ultimately, the former group was able to move ahead with their desire to create a funding stream by positioning the activities as an ‘experiment’ on a small scale. In a relatively short amount of time, members launched an application process and 62 applications were received. A task force was set up to allocate micro grants (less than USD\$20k) to awardees, and a high-level process was specified but specific steps to select grantees were not yet developed.

When attending the task force meetings, I took careful observation of the manner in which the co-chair conducted the meetings, which involved a significant amount of wayfinding work. First, the co-chair was at pains to allow every member of the task force to express their viewpoints before any decisions were made. When there were disagreements or strong opinions, they would acknowledge these members’ concerns and often express sympathy with their point of view. Often, they would use this opportunity to remind the group that the task force was conducting ‘new and experimental’ activities for the network

and acknowledge that this could lead to mistakes or oversights. They would then suggest a way forward that constituted a middle path, taking into account as many of the members' concerns as possible. Finally, they would label this middle path as a 'test' activity and establish a date to review the outcomes of this activity with a subset of the members—including the most vocal members so that they felt that their concerns were being addressed.

By positioning actions as 'experiments', members were able to sustain their concerns or reservations about decisions while still maintaining their engagement in the network. In some cases, this positioning allowed members to continue to pursue their own priority activities while justifying less-aligned activities happening throughout the network. For example, in one interview, a member who had been chairing a very active WG expressed concern about the lack of focus of the network, particularly as it was growing and expanding to include numerous initiatives and country chapters. In the conversation, they described the country chapters as an 'experiment', which allowed her to continue to pursue the work of the WG as attention in the network shifted elsewhere:

“So what do I think about the country chapters? I think it's good but you know...social entrepreneurs got a mind of their own. So they [are] going to do whatever they want to do [laughs]. So we might be hoping to work with them but not sure whether they will work...they'll have their own priorities. So I think it is [a] massive experiment.” [20]

I found this type of wayfinding work to be incredibly important, since there were often instances in the network where initial enthusiasm for a project would wane as other initiatives came to the fore. By positioning new and exciting activities as 'experiments', action could continue on less high-profile projects even when they were not the focus of the entire network.

More broadly, in the interviews, several members even expressed Catalyst 2030 as a whole and their involvement in it as experiments. For example, two members - both with strong coordinated action frames - described their early engagement in the network:

“I am somewhat intrigued in just this whole...I see it a bit as an experiment...it seems a bit like a self-organizing committee which isn't really, I also thought it was a little anarchic to a certain extent...if it had been me, if I had a stake you know in the whole thing I would have gotten very frustrated but now I've found it very amusing to see and [an] interesting social [experiment].” [16]

“So for me Catalyst is also an interesting experiment, you know it is sort of, I don't quite know which bucket of those to put it in but I tend to put it at work stream two so it is about delivery. But sometimes I think Catalyst thinks it's also about all of those things and it's about mind sets and system shifts and financing. But you know in my mind Catalyst is mostly usefully seen as a network of practical implementers who are a little maverick I suppose.” [19]

7.6 Brokering Work

The third type of relational institutional work I will describe is *brokering work*. Brokering work was not derived from any set of collaboration frames, but instead refers to a type of work that ensured repeated and constructive interactions between heterogeneous members in the network. Brokering was a supportive type of work to the other two types of work: it was crucial to ensuring that the work of legitimizing heterogeneity and wayfinding was carried out. In contrast to these types of relational work, however, brokering was often conducted at the leadership level (in the case of Catalyst 2030, this is comprised of the Secretariat and Governing Council). However, organizational actors who were not in leadership roles were also performing brokering work from time to time.

Brokering work involved the purposeful curation of relationships amongst actors to sustain engagement in the collective. It created the conditions for diverse actors to interact with each other and to foresee in those interactions the possibility for achieving their individual and organizational passions and interests. In a way, this work seems antithetical to the work that I have described above since it elevated individual desires over the collective; however, in my period of observation, it became clear that acknowledging individual and organizational interests were essential to enrolling and sustaining actor involvement in the network. At a basic level, brokering work involved carefully listening to actors when they

described their organizational goals, as well as personal interests, skills and passions. It also entailed identifying fellow actors who might work well together, balancing their strengths and weaknesses. Finally, brokering required a critical step: anchoring actors into sub-groupings where they could contribute to the network while also progressing their organizational and individual passions and goals.

Ritualizing

In Catalyst 2030, one of the ways I observed members performing brokering work was the practice of *ritualizing*: creating recurring initiatives that ensured repeated engagement by and interaction between members, with the aim of maximizing the diversity of the interconnectivity of the network and its broader field. This practice was one of the more conspicuous types of work in the network, with a significant amount of activity and energy devoted to it. The work was largely initiated by the Governing Council (determining the frequency and chairpersons of recurring initiatives) and coordinated by the Secretariat (performing the support and administration for the recurring initiatives). While much of this work appeared to the outside eye to be a form of organizational mobilizing and information exchange, I began to observe a more fundamental purpose. By creating justifications for members to connect routinely over significant periods of time, these events and initiatives ensured that members engaged in repeated interactions that were positive and constructive. In other words, while ritualizing appeared to be instrumental (for the purpose of mobilizing and information exchange), it was, in fact, highly relational: recurring events and meetings ensured that relationships were deepening and that heterogeneous members were able to ‘play’ at collaborating, by virtue of the simple act of coming together regularly for a common purpose.

Catalyst 2030 had a number of events which served as rituals, bringing the membership

together repeatedly and requiring groups to form and meet regularly to carry them out. These events and meetings included annual online public ‘flagships’, including Catalysing Change Week (CCW) and the Catalyst 2030 Awards, as well as the monthly online member General Assembly (GA). These events provided a structure and rhythm to the network, while also requiring a significant amount of voluntary and employee time. Secretariat members and Governing Council members were crucial to ensuring that these events were scheduled and carried forward, identifying and inviting members to join the committees and providing the broad structure and encouragement as they were organized, planned and launched each year.

For ‘flagships’ (a network term), members of the Governing Council volunteered as co-chairpersons to lead the annual events. Chairpersons then recruited committee members who met regularly throughout the year to develop the event. Some members singled out committee involvement as being an important place to build relationships and a highlight in their involvement with the network. One member put in succinctly: “Friendships happen at committee.” [08] Another member described a similar sentiment about their involvement on the Awards committee:

“I got involved at the awards thing last year. And that was really something. I...jumped at it, and I dived right in, and it was so much fun, we did so many mistakes, but we learned from it and it was really great to be a part of that whole group. And now that I am supposed to be a co-chair with [fellow member], I am really excited that what we are going to do next year, but it has been a fabulous, fabulous experience being just part of this group within Catalyst...In the awards committee, I have really built relationships...So, it has been a nice little community where we generally meet once every week, and there is so much to talk and think and, you know, think through. So, it becomes like a group of people that you like working with, and you keep working with.” [06]

Beyond recruiting and involving committee members, flagships also offered an important ‘excuse’ to connect current members with potential future members, particularly in sectors that were less likely to join a network that is heavily focused on social innovation and entrepreneurship. In contrast to other types of networking events—such as one-off conferences, leadership retreats or professional courses—Catalyst flagship events were

designed to require a significant amount of self-organizing. For example, members who chose to participate in CCW, a week of online sessions devoted to learning about social entrepreneurship and innovation, were required to develop their own sessions, recruit speakers, design a session agenda and promote their event to their professional networks. This means that session participants usually met intensively for a period of time leading up to the week, getting to know each other and their interests through the process. In informal conversations with CCW participants, I learned that relationships and formal partnerships were often formed through this process. For example, in one instance, a speaker that had been recruited to a CCW panel discussion eventually joined the board of the panel organizer's organization. In another example, a group of participants eventually formed a large-scale multinational collaborative that was supported with funding from a fellow Catalyst 2030 member.

Similarly, the Awards event required Catalyst members from around the world to nominate prospective funders as potential awardees. Through this nomination process, members were incentivised to get to know funders in their network, building a different type of relationship than that of grantor-grantee. Providing members with an opportunity to give an award to funders inverted the traditional power dynamic of members as recipients. This built new relationships between Catalyst members and funder nominees, and opened up possibilities for constructive and repeated interaction between Catalyst members and influential sector actors.

Finally, Catalyst 2030's monthly GA was highly ritualized with the aim of creating opportunities for connection and repeated interaction. Each GA was co-hosted by two Governing Council members who volunteer for the role. Co-hosts were often paired to reflect the diversity of the network, for example members of different genders, sectors or geographic regions; the role of co-hosts allowed leading members to partner up and get to know each

other better. Meetings were opened with a welcome to all new members, with a link to a spreadsheet that listed all of the new individuals and organizations who have joined Catalyst 2030 over the last month. This list often had 100 or more new members. Meetings also concluded with celebrations, a cheerful public acknowledgement of awards and successes achieved by members.

As far as meetings go, the Catalyst 2030 GA was not wildly out of the ordinary; in fact, the tactics employed in the lead up to the meeting and the GA itself are relatively commonplace in organizations and networks. Even so, there were a few characteristics about the GA that deserved special mention. First, the GA showcased the breadth and diversity of the network as a distinctive feature. New members were welcomed and showcased each and every month, representing the growth and vitality of the network. Multiple and diverse members had the opportunity to co-host and present at the meeting in a language of their own choosing. Agenda items were exceptionally short so that a large number of members were able to access airtime during the monthly call. Celebrations enabled members to see what other members had achieved and felt a sense of camaraderie while celebrating together. Second, the frequency and duration of the meeting (monthly, with two iterations for time zone inclusion) was exceptionally high for an international network of more than 3000 individual members. Through this high frequency, the GA regularized interaction by creating norms of behavior of coming together in community so that members were in continual relationship with each other. This regularity was enhanced by the greeting and behaviour norms that were exercised in the meeting: exchanging pleasantries, keeping cameras on, and sticking to timeframes were modeled by the Secretariat and the Governing Council, creating a spillover effect for new and existing members. Finally, the GA provided action opportunities for members, providing immediate ways to get involved and become part of the life of the network. By emphasizing contributions from the community, the GA normalized

sharing and collaboration as a normal and expected behaviour for membership.

Multi-vocalizing

A second practice included in brokering work was multi-vocalizing. Multivocality is drawn from one of the strategies of robust action described by Ferraro et al. (2015), which is, in turn, derived from the identification of this practice in Padgett & Ansell (1993)'s widely-referenced study of Cosimo de' Medici. Ferraro and colleagues define multivocality as "Discursive and material activity that sustains different interpretations among various audiences with different evaluative criteria, in a manner that promotes coordination without requiring explicit consensus." (Ferraro et al., 2015, p. 373) They emphasize that multivocality is not just ambiguous behaviour, but is rather actions that incorporate multiple and varied interests with a desire for open-endedness in light of uncertain futures. Based on my observations with Catalyst 2030, I would augment Ferraro et al. (2015)'s definition by considering multi-vocalizing as a relational practice in addition to its discursive and material components. Multi-vocalizing requires members (usually leaders and collective curators) to maintain relationships between a wide variety of fellow members in order to understand the contexts through which terminologies, stories and narratives are interpreted.

I observed Catalyst 2030 members—and in particular, its leadership—practicing multivocality on numerous occasions, both within the network and with outside audiences. One of the most obvious examples of multivocality in the network were the continuous conversations devoted to crafting of terminology. Over the course of my observation period, I participated in a number of meetings devoted to revising a 'glossary of terms' for current and prospective members. The purpose of the glossary (which was both discursive and material) was to give members a guide to the numerous catchphrases and jargon that were used within the network. During my observation, beyond the glossary itself, I became curious about the

intensity of the conversations and the extensive iterations that were required to arrive at acceptable terms and definitions for the group. Over time, however, I realized that the definitions were critical to the sustainment and growth of the network, determining the legitimacy of members and their activities. In particular, the terms ‘social entrepreneur’ and ‘social innovator’ were particularly fraught, yet ultimately, extraordinarily useful. Both terms have a history of being vague and “contested” (Choi & Majumdar, 2014), but too often this contestation is seen as a fight over ideas rather than a contest of relational boundaries. Within Catalyst 2030, I witnessed these debates as relational rather than discursive. Determining the definition of a social entrepreneur or social innovator was an act of defining relational ‘territory’, allowing (or disallowing) a large range of organizational actors to identify with and feel part of the network. Attempts to limit these definitions were taken as an affront by a subset of the members in the network, and, by keeping the definitions ambiguous, a multitude of actors (including for-profit organizations, nonprofit organizations, corporate and government ‘intrapreneurs’, and even academics) felt that the term was inclusive of their contributions. Accordingly, Catalyst 2030 leaders and members ensured that the glossary definitions of these two terms were demonstrably vague. This ensured that members saw themselves as part of the ‘tribe’.

Multi-vocality can also apply to relationships themselves. I observed members of Catalyst 2030 performing brokering work by multi-vocalizing about the act of collaborating itself. Catalyst 2030’s stated purpose is to catalyze collaborations for the SDGs. Yet, in numerous conversations, members expressed an uncertainty—and sometimes a level of exasperation—about what constituted a collaboration. I noticed that in meetings where this essential question was posed, members would point to examples of collaborations rather than use firm definitions. Although there were similar features across collaborations, attempts to classify, clarify and standardize the collaborative process were attempted and largely failed. In some

cases, actions taken within other sub-groupings, such as Working Groups (WGs), Issue-based Groups (IBGs) or Task Forces, were re-categorized as collaborations, expanding the repertoire of actions considered to be collaboration even further. Again, while this ambiguity was frustrating for some members, it ultimately served the network to keep the concept of collaborative action quite vague. In this way, many different types of relationships and collective actions were able to be initiated and receive the honorable badge of being a ‘collaboration’.

Multi-vocalizing can be material (Ferraro et al., 2015) while also being relational. One of the more unusual examples of multi-vocalizing in Catalyst 2030 was the use of traditional class hierarchies as a proxy for legitimacy for the network. One of my first observations of Catalyst 2030 was the first Awards ceremony, hosted virtually from the seat of the Spencer family in Northamptonshire. Later, I was invited to attend a four-day convening at the same venue, joining thirty-five members of Catalyst 2030 at Althorp House. In both cases, the luxurious and stately surroundings gave a sense of occasion to the events. Although deeply paradoxical, members enjoyed the opportunity to learn about the history of the house and the traditions that it maintained, while also using the hospitality to strategize about building more equitable social structures. For the diverse members of Catalyst 2030, these artifacts of aristocracy had different meanings. Alongside Catalyst 2030’s objective to “counteract the dominant paradigm” (Catalyst 2030, 2021) of international development and “shift the funding paradigm” (Catalyst 2030, n.d.-f) of philanthropy, the network successfully used these indicators of power and prestige to convey a sense of legitimacy and longevity for the network.

While multi-vocalizing is largely seen as a discursive practice used by heterogeneous collectives and political operatives to further institutional aims, the experience of Catalyst 2030 shows that this practice can also be seen as relational. In Catalyst 2030, multi-

vocalizing was a practice that created and maintained connections across diversity, partly by ensuring that heterogeneous actors felt welcomed in the ‘big tent’, but also by refracting similar concepts through a prism of differential experience and allowing actors to see commonality even in contested terrain. This type of work kept heterogeneous members in repeated and constructive interaction with one another, despite their different backgrounds, perceptions and objectives.

Contribution anchoring

A third practice that was critical to brokering work is a practice that I call *contribution anchoring*. Contribution anchoring involved two activities, both which required network leaders and members to form deep relationships with fellow members. First, members needed to have opportunities to express their organizational and personal interests and goals, and these possible contributions need to be ‘plugged into’ an existing or burgeoning opportunity within the network. Importantly, in my observations, members’ interests and aspirations came first, and opportunities were then matched to these interests. When this ‘match’ was made, members saw participation as an opportunity to realize possibilities that may have seemed out of reach before, but they also felt the satisfaction of contributing to the network. These two symbiotic activities were critical to achieving member commitment and engagement.

In one of my conversations with the Chief Facilitator, they described the first part of this practice clearly: they said that when they spoke to members they listened deeply to understand what they were hoping to achieve, both personally and professionally. Only when they believed that they understood what they are looking to accomplish did they offer an opportunity within Catalyst 2030. This practice sounds simple, but in many membership prospecting conversations, listening is performed with closedness—network organizers are

listening to hear the things that they want to hear, such as a specific skillset or a willingness to provide time and resources. When organizers listen with closedness, they often do not hear the deep yearnings that prospective members arrive to networks addressing GCs. By not listening with a willingness to hear, they often miss the opportunity to ‘broker’ the appropriate opportunity for a member.

I confirmed this practice when several members described to me the way they experienced their initial conversations with the Chief Facilitator. One member said:

“[The Chief Facilitator] rang me some time later. And said, “You know when we were at Harvard, you said social entrepreneurs have gotten solutions for the SDGs? Well I’m starting this thing and we could work on that.” And I know that at the same time [they were] ringing [fellow member] in Ashoka and saying, you know you thought that funders...should fund system change for social entrepreneurs and well...I am starting this thing and you should join...and I think [they] had that conversation [with many others]...and—where it was appropriate obviously— mashed it altogether.” [20]

Contribution anchoring provided pathways for members to realize individual goals while also acting in service to the network. Both aspects, when married together, deepened the commitment that the organizational actor felt with the network. One member described this duality as a “two-way street”, saying:

“[Collaboration is] about not just – what value are you getting out of this alliance? But what are you willing to give to the alliance? So it’s both the responsibility and accountability as well as value for your own organization, right?...So I think creating the pathway, right from the beginning to make the expectations clearer, it’s a two-way street, buddy. It’s not something you can come and take. You should contribute too. So I think that I found useful to be clear right up front but without being transactional, without challenging a small organization to say, “What are you going to give?” That’s not ideal. It’s about every institution or organization has unique, things that they can offer to the global movement.” [01]

In my interviews and observations, this aspect of contribution anchoring seemed to be pivotal, providing members with a stronger level of engagement and commitment than they would have had otherwise. As one member recalled:

“I couldn't see the value so fast. I thought, this is like another network, like, I am part of the school network, or I am part of some other network, this is going to remain that, you know, we might meet at conferences and we might just exchange ideas, but I did not expect it to be...So, I did not know whether, how I can actually contribute to the network initially. But having kind of navigated that for the last, what, a year and a half, I know that I can now contribute. And I see my contributions clearly. And that makes you much more engaged, right?” [06]

Figure 13: Relational Work of Heterogeneous Collectives

Type of Relational	Relational Pursuit	Polarity Orientation	Practices	Illustrative Quotes
Legitimising Heterogeneity Work	Forging deep connections between heterogeneous actors in order to expand and endorse a broader range of institutional possibilities, in particular non-dominant perspectives and practices that are currently less represented in the institutional field	Time-giving/Sense-making	Democratising Exploring and expanding the collective to identify, normalise and elevate perspectives and practices that are less represented in the existing institutional field	"Listen, you know we can't be in this silo. So this is kind of conversations I probably would not have had two years ago. So it's really healthy that...we're not looking at...our umbilical constantly." [15]
			Humbling Establishing new norms for how actors relate to one another that break down existing hierarchies and barriers to connection	"Everybody was there. I mean, retrospectively, you have all these people who apparently were...well known in their field...everybody expressing their opinion, and talking about and we're all social entrepreneurs. I later realized there were funders there. I didn't realize there were funders and foundations. And so, to me, I think...that was the levelling field, that we're all equal." [03]
Wayfinding Work	Guiding groups of members in a staged and emergent manner toward concrete action and shared agendas	Action/Urgency	Suspending Purposefully slowing down activities and encouraging repeated interactions and listening across dimensions of diversity and heterogeneity	"I remember spending...eight to 10 hours with her and our team because I think they cared about what they were doing. I could see it and I said okay I have my time, I will give it and then I didn't translate or anything for us." [04]
			Assembling Molding a set of diverse ideas and perspectives into composite actions and messages that encapsulate the group's collective ideas	"...nothing that emerged from my group was something one person thought of. It was always one person with the idea backed by the other, other, other." [14]
Brokering Work	Creating the conditions necessary for repeated and constructive interactions between heterogeneous members	Bridging between Polarities	Experimenting Proposing small actions that serve as short-term 'experimentation' rather than decisive, long-term action	"This is the first time that Catalyst 2030 carried out this process of awarding funding grants to members. The process was designed and implemented in record time. As with any new endeavour there is much to be learned and improved from the first round of implementation...It is all about continuous human-centered design and trial and error." [Catalytic Grant Feedback Report]
			Ritualising Creating recurring initiatives that ensure repeated engagement by and interaction between actors, with the aim of maximising the diversity and interconnectivity of the collective	"In the awards committee, I have really built relationships...So, it has been a nice little community where we generally meet once every week, and there is so much to talk and think and, you know, think through. So, it becomes like a group of people that you like working with, and you keep working with." [06]
Brokering Work	Creating the conditions necessary for repeated and constructive interactions between heterogeneous members	Bridging between Polarities	Multi-vocalising Maintaining relationships with a wide variety of actors in order to understand the contexts through which terminologies, stories and narratives are interpreted	"Collaborations exist between/among members (and allies) in service of achieving the SDGs. At Catalyst 2030 we approach collaborations through a systems approach, recognising the need to co-create and co-design collaborations that shift the ecosystems in that we operate. This moves our work from the "me" to "we" mindset to achieve deep change." [Catalyst 2030 glossary]
			Contribution anchoring Creating opportunities for actors to express their interests and goals, and then anchoring these contributions within an existing or burgeoning opportunity in the collective	"[Collaboration is] about not just – what value are you getting out of this alliance? But what are you willing to give to the alliance? So it's both the responsibility and accountability as well as value for your own organization..." [01]

8. Discussion: Toward a Theory of Collective Institutional Agency

This study started with the ambition to better understand the phenomenon of collective agency in the context of Grand Challenges (GCs). I hoped to explicate the ways in which heterogeneous organizational actors arrived to collective architectures and derived collective agency for institutional change in the complex, uncertain and evaluative domain of GCs. Since GCs are institutional in nature, the study honed in on the institutional work of these actors addressing these issues in collective ways. To explore this phenomenon, I asked three questions: (1) How do heterogeneous organizational actors experience issue-based institutional fields in the context of a GC, in light of their characteristics of complexity, uncertainty and evaluativity?; (2) What expectations and aspirations do heterogeneous organizational actors have for collaborative arrangements, and how do these expectations influence their behaviours within collectives?; and (3) What types of relational practices emerge amongst heterogeneous organizational actors operating within complex, uncertain and evaluative contexts, such as GCs, and how do these practices contribute to the construction of collective agency?

To provide an empirical study site, I joined a membership-based network of individuals and organizations committed to advancing the Sustainable Development Goals (SDGs) and dove deeply into the members' collective world: the experiences that they brought into the collective space; the situations and topics that created excitement and passion; the relationships that resulted in equal parts loyalty and irritation; the obstacles and challenges that kept them up at night; and the practices and projects that motivated them to keep working together.

Over the course of the two-year study period, I derived three sets of findings. First, I observed that heterogeneous organizational actors arrived to collective structures with similar 'experience sets', a term that I used to describe the combination of perceptions, emotions and

desires experienced within a GC. These experience sets were interaction based, revealing the ways in which Catalyst 2030 members perceived, felt and hoped in relation to other actors within the issue-based institutional field of the SDGs. The first experience set, *fragmentation*, described a pervasive sense of disconnection that members felt in relation to other members in the context of a GC. The second experience set, *time precarity*, reflected the equivocacy that members felt in relation to the temporality of addressing a GC. The third and final experience set, *path ambiguity*, identified an incongruity between the amount of exposure to a GC that members had versus the level of certainty about the path forward.

Despite these common experience sets, organizational actors also came to collective structures with different expectations about how to work together. In the second set of findings, I named these expectations ‘collaboration frames’, drawing upon the processual, interactionist approach employed by Gray et al., 2015 to explain the microprocesses of institutionalization. The four collaboration frames that I identified are: *coordinated action*, *advocacy*, *social learning*, and *meaning-making*. For each of these frames, I described four frame aspects held by members utilizing each frame: (1) the purpose that was ascribed to the network; (2) the alignment priorities that participants deemed important; (3) the requirements of members that participants held of their fellow members; and (4) the terms of engagement that they anticipated in their collaborative work with the group. When stepping back to look at the four frames in relation to each other, I observed that they were distinguished by two polarities: the time-giving/sensemaking side and the action/urgency side. While this polarization of collaboration frames created potential frustrations amongst actors working collaboratively, they also provided important opportunities since the contradictions in these two polarities provided a balance of reflection and action for institutional work.

In the third set of findings, I described the interplay between the polarities of collaboration frames as *practices of relational work* that sustained engagement while

maintaining heterogeneity in the collective. By performing relational practices, members exercised their collaborative frames and created a balance of reflection and action that maintained a plurality of approaches across heterogeneous members. I explored three types of relational practices—*legitimizing heterogeneity work*, *wayfinding work*, and *brokering work*—that allowed heterogeneous members to sustain their engagement in the network. Legitimizing heterogeneity work, which was aligned with the time-giving/sense-making polarity, was performed by members forging deep connections between heterogeneous actors in order to expand and endorse a broader range of institutional possibilities, in particular non-dominant perspectives and practices that were currently less represented in the institutional field. Wayfinding work, which was associated with the action/urgency polarity, guided groups of members in a staged and emergent manner toward concrete action and shared agendas. At the center of these two types of work was brokering work, which was not associated with a polarity, but rather a form of work creating the conditions necessary for repeated and constructive interactions between heterogeneous members.

In the chapter that follows, I will interpret these findings through the literature and discuss how they contribute to theory building around collective agency and institutional work. First, I will relate these findings to the sociological and organizational literature on agency, exploring the ways in which a pragmatic and phenomenological approach to agency extends our understanding of what drives organizational actors to come together in collectives. In this section, I will argue that two relational aspects of agency—*temporality* and *sociality*—are integral to understanding how agency is derived within collective structures addressing institutionally-derived challenges such as GCs. Based on this understanding, I will reconsider the assumption that actors arrive to collective structures with problems that are “ready-made” (John Dewey, 1910, p. 140) and an ends-means assessment of their work together (Fjeldstad et al., 2012; Gerlak & Heikkila, 2006) Instead, I will pose

the possibility that heterogeneous collective organizing in GCs is a response to common experience sets that raise ‘frustrations of temporality and separateness’ amongst individual actors. In these circumstances, collaboration emerges as a valuable objective in and of itself, since ‘being together in the problem’ is seen to alleviate the frustrations that arise from disconnectedness and temporal disturbance. It is this desire and undertaking to ‘be together in the problem’ that contributes to a “conscious sense of group” (Cerulo, 1997) that is critical to the construction of collective agency.

Next, I will combine this exploration of agency with the literature on cross-sector collaboration and organizational heterogeneity, attempting to better elucidate the nature of collective agency, particularly in the context of GCs. In the literature review, I cited Hampel et al. (2017)’s recognition of cross-sector partnerships (CSPs) as a realm of scholarly activity that can shed light on how heterogeneous collectives can work together to address social challenges. CSP scholars have raised attention to ‘goal conflict’ as a core tension in these types of partnerships, since heterogeneous actors may have diverse approaches to timing, resourcing and capacity (Hampel et al., 2017; Huxham & Vangen, 1996; Selsky & Parker, 2005). The observations of Catalyst 2030 reflect this tension in the description of collaboration frames, but reveals that these differences may, in fact, be highly productive. Collaboration frames, if taken in the context of the agency literature, could allow members to broaden and deepen their engagement with different temporalities and be an important component that distinguishes and energizes collective agency over other forms of agency.

While collaboration frames allow for a more nuanced understanding of the expectations that actors bring to collective structures, my findings point to a set of relational practices that allow collectives to form a sense of agency beyond their own individual agency. The literature on CSPs, as well as other forms of heterogeneous organizing, has focused on practices that are largely instrumental, such as the creation of “meta-goals” (Hampel et al.,

2017, p. 576), shared purpose (Ackermann et al., 2005; Huxham & Vangen, 1996; Soundararajan & Brammer, 2015) and collective identity (Koschmann et al., 2012). By again placing this study's findings in the context of agency, I will propose a more relational approach that I believe supersedes instrumental practices as the core work of heterogeneous collectives in the context of GCs. Relational practices allow organizational actors in heterogeneous collectives to traverse the temporalities that make up agency more readily, resulting in "programs of action" (Kahneman, 2011; Kahneman & Tversky, 1984; Lawrence & Phillips, 2019, p. 28) that are in direct response to the complex, evaluative and uncertain nature of GCs. In this section, I will also emphasize the dialogic nature of this work over the more dialectical approaches that are highlighted in other scholarly accounts (Hargrave & Ven De Ven, 2006; Seo & Creed, 2002).

Finally, I will place these enquiries within the body of institutional work—and broader social-symbolic work—literature, arriving at a process theory for how collective institutional agency is constructed in the complex, uncertain and evaluative context of GCs. While heterogeneity brings forth institutional contradictions that inspire projects of change, it is through repeated interaction and sustained engagement—fueled by dialogue and forestalled disengagement (Ferraro et al., 2015)—that results in a plurality of approaches to resolve these contradictions. This pluralism is unique to collective accounts of agency, and particularly productive in the context of GCs (Ferraro et al., 2015; Verweij et al., 2006).

8.1 Collective Agency and the "Conscious Sense of Group"

This study is deeply tied to the sociological literature on agency. Sociology has historically had a rather arms-length treatment of agency, with most theories failing to "distinguish agency as an analytical category in its own right." (Emirbayer & Mische, 1998, p. 962) Institutional theory is no exception; in early treatments of institutional theory,

explanations of action and agency were largely bypassed. Since institutional theory arose as a scholarly domain to explain organizational homogeneity, these explanations were not deemed necessary (Dimaggio & Powell, 1983; Tolbert & Zucker, 1983). However, as the scholarly field matured, institutional theorists became interested in processes of institutional change (Battilana & D'Aunno, 2009; T. B. Lawrence & Suddaby, 2006; Seo & Creed, 2002). To explain change, theorists needed to bring in more thorough accounts of agency. Yet, for scholars who had spent time understanding institutional constraints, including agency in their studies presented a paradox: how do organizational actors, operating within institutional constraints, develop the imagination and creativity, will and motivation to act in agentic ways, rather than repeating the same patterns and behaviours dictated by their institutional habitus (Battilana & D'Aunno, 2009)?

Propitiously, recent literature has sought to remedy this oversight, and in the process, has shed light on how actors use their agency to enact institutional change. Starting with Emirbayer & Mische's seminal paper "What is Agency?" (1998), conceptions of agency began to incorporate two key aspects: temporality and sociality. While some scholars emphasized "hypermuscular" (Lawrence et al., 2009) accounts of individual agents (Battilana et al., 2009) others sought to temper this enthusiasm with more restrained accounts of actors "that was variously more fragmented, distributed, partial and collective" (Hampel et al., 2017; Lawrence et al., 2011). These and other explorations of agency have largely resolved the structure-agency debates that characterized the early period of the social sciences, instead bringing in richer depictions of agency that are relational and heterogeneous, rather than individualistic and unitary (Lawrence & Phillips, 2019). This conceptualization of agency is rooted in the philosophies of American pragmatism and Continental phenomenology, meaning that agency is contextual and experiential (Emirbayer & Mische, 1998). As a continuously forming and re-forming construct, agency is neither static nor singular—it is

continuously being reconstituted through actors' experiences of the social and material world around them.

Emirbayer & Mische (1998) importantly drew attention to the *temporality* and *sociality* of agency. Building upon the work of Mead (1932), these two scholars emphasized a concept of time that was comprised of “*emergent events*, which require a continual refocusing of past and future, and the concept of human consciousness as constituted through *sociality*, the capacity to be both *temporally* and *relationally* in a variety of systems at once.” (Emirbayer & Mische, 1998, p. 968) They go on to “reconceptualize” agency as a “a temporally embedded process of social engagement, informed by the past (in its habitual aspect), but also oriented toward the future (as a capacity to imagine alternative possibilities) and toward the present (as a capacity to contextualize past habits and future projects within the contingencies of the moment).” (ibid., pg 963) The implications for studies of agency are manifest: if social actors are able to relationally move within and between multiple social systems in an intersubjective manner, they are thus able to experience different structures, some of which may be in contradiction with one another. Furthermore, just as actors are able to similarly move between temporalities through deliberations of the mind, they can activate *past* habits of thought and action, generate *future* possibilities through imagination, and make *present* judgments based on practicalities and normative assessments. Sociality draws in the relational aspect of agency, situating actors in a multiplicity of relational contexts and culminating in acts of communication, where actors are able to intersubjectively hold their own and another's viewpoint simultaneously (ibid.) This ability to traverse temporalities and socialities results in “reflective consciousness” (ibid, pg 969), which, derived from both individual current and past experiences, and also, relationally, by taking on the experiences of others, is an iterative process that serves as the source of acts of creativity and imagination.

Based on this historical account of agency scholarship, I can relate the findings to the

early stages of constructing a sense of collective agency. In Chapter 5, I described three experience sets that characterized the experiences of organizational actors prior to collective formation. Since agency is pragmatically and phenomenologically constituted and re-constituted in the context and experiences of actors, it was important to deeply understand the experiences that brought Catalyst 2030 members to their desire to work together. Yet, one of the surprising aspects of the findings was that members rarely arrived to the collective with experiences that revealed a well-articulated set of goals or practical assessment of the ends they were trying to achieve. Rather, the patterning of the experience sets—fragmentation, time precarity, and path ambiguity—revealed *frustrations of separateness and temporality* that characterized the experiences of organizational actors prior to collective formation.

- **Frustrations of separateness:** In each of the experience sets, the perceptions, emotions and desires of actors revealed intense difficulties that were related to feeling separate and alone in their address of GCs. In the first experience set, *fragmentation*, actors were attuned to the disconnection between themselves and others who were addressing similar or interrelated issues. In some cases, this disconnect was technical, based on sectoral and professional silos which prevented the sharing of information and strategies, whereas in other cases, it was competitive, with “logos and egos” [01] getting in the way of connections. Still others described disconnection resulting from power imbalances and the historical marginalization of knowledge holders who did not come from dominant populations. In the second experience set, *time precarity*, actors acknowledged conflicting priorities and a sense of time scarcity which contributed to busy-ness and urgency. These heightened emotions often ‘crowded out’ the ability to spend time in relationship with others who were working on similar issues and contributed to the isolation that actors felt when addressing GCs. Finally, the third

experience set, *path ambiguity*, invited an openness to others and their ideas, but resulted in a lack of expectations and opportunities for alignment that, in turn, frustrated the creation of goal-directed partnerships.

- **Frustrations of temporality:** Similarly, in each of the experience sets, actors were encountering issues related to time. In the experience set of *fragmentation*, actors felt unable to relate their personal and organizational actions to the sequence of events happening outside of their own work. Strategies that they were developed organizationally felt disjointed from those being developed in other political and organizational spheres. In the experience set of *time precarity*, issues of temporality were particularly elevated, since many members found it difficult to prioritize their work in relation to others, and worried about wasting time in contrast to the urgency of the issues they were attempting to solve. Finally, in the experience set of *path ambiguity*, members experienced an inverse relationship between the time that they had spent addressing a GC and the certainty that they felt about the ‘solutions’ to the issues.

Given the nature of agency as “a temporally embedded process of social engagement” (Emirbayer & Mische, 1998, p. 963), I propose that these frustrations of separateness and temporality—common to the experience sets of actors in GCs—thwart the exercise of individual and organizational agency. It is possible to view these crises as creating an experiential maelstrom for actors who were prone to carrying out agentic “programs of action” (Lawrence & Phillips, 2019) to address GCs, and yet were unable to do so on an individual or organizational basis when beset by these frustrations. Harrowed by frustrations of temporality and separateness, actors found that they were less capable of performing the iterative process of agency: informing themselves of the past, imagining the alternative

possibilities of the future, and contextualizing these past and future orientations within the contingencies of the moment (Emirbayer & Mische, 1998). These frustrations could only be resolved by reducing separateness and engaging temporality, activities which required the intersubjectivity that is achieved by participating in a multiplicity of relational contexts and acts of communication. Heterogeneous collective organizing and collaboration within this context became a natural next step for actors who were experiencing these frustrations. Through the heterogeneous collective, actors were able to foresee the alleviation of disconnection and stalled action, while envisioning the resuscitation of a sense of agency amidst the complexity, evaluativity and uncertainty of GCs.

Using this multi-faceted conceptualization of agency, we can revisit theories that posit goal formation and structured roles as pre-conditions of collective action (Fjeldstad et al., 2012; Gerlak & Heikkila, 2006). If the experience of GCs thwart individual and organizational agency as described in the previous paragraph, then the initiation of collective organizing amongst heterogeneous actors does not necessarily—at least at the outset—require a shared understanding of how to address a GC directly. Indeed, the nature of these experiences means that actors may arrive to these types of collective arrangements with *less certainty* about how to address the issue than they engage in other, more goal-directed activities. Instead, the experiences of being in a GC over time frustrate less collective forms of agency to such a large degree that collective responses and collaboration become an obvious or imperative next step. It is only within a collective context that actors can reactivate the temporality and sociality that the process of agency requires. In this assessment, collective organizing, therefore, can rather be viewed as pragmatic response to the institutional contradictions of GCs, creating an intrinsic value of ‘being together in the problem’ that is seen to alleviate experiential frustrations that are less apparent in the fragmented, time precarious and path ambiguous institutional field.

Furthermore, I would argue that it is these common experiences—rather than a common formulation of the problem—that lays the foundation for the “conscious sense of group” (Cerulo, 1997) that is essential to collective agency. Accounts of inter-organizational collaboration have identified collective identity formation as a key “object” (Hardy et al., 2005, p. 62) that is created through discourse and repeated engagement, and is “distinct and stable” apart from organizational or individual identity (Koschmann et al., 2012, p. 342). Yet, these accounts of ‘we-ness’ assume that engaging in communicative acts to form collective identity are largely instrumental and formed through rational discussion of issues, roles and tasks (Collins, 1981; Hardy et al., 2005). Instrumental objectives can seem anemic and insufficient when considering the extent of opportunity costs in terms of time and resources in collective organizing. In the context of GCs, layered with heterogeneity, it is sometimes hard to understand *why* organizational actors persist in forming collectives and engaging in collaborative efforts with actors possessing different time horizons, resources and capabilities. Based on the experiences related by Catalyst 2030 members, and understood within a relational approach to agency, however, the persistence and doggedness of organizational actors to collectively come together becomes more understandable. It is possible to see the initiation and persistence of forming a ‘we’ as a necessary and communal response to the existential frustrations to agency that GCs represent. While instrumental reasons for collective identity formation are still valid and important, they can be augmented by the understanding of ‘group-ness’ as an antidote to frustrations of the temporality and sociality of agency.

8.2 Heterogeneous Collectives and the “Chordal Triad”

In this section, I will provide an in-depth exploration of how the collective actor derives a full sense of collective agency through the improved ability to address the “chordal triad”

(Emirbayer & Mische, 1998). As described above, if actors arrive to heterogeneous collectives with a belief in the intrinsic value of collaboration and a predisposition to forming a ‘we’, this provides important conditions for the development of collective agency. However, the intention and willingness to be together and collaborate are not the only conditions necessary for forming collective agency. Previously in the literature review, I identified Cerulo (1997, p. 393)’s definition as the “conscious sense of group as agent” as a starting point for the understanding of collective agency. Using this definition, the sense of ‘we-ness’ is therefore combined with the group’s presumption of the capability of being an agent to address GCs.

To understand the construction of collective agency, we must then consider how a heterogeneous group moves from intent and willingness to work collectively to a conscious sense of being part of a group that is capable of agentic action. In the study of Catalyst 2030, I discovered that members arrive to the collective with similar experience sets but different expectations of how they will work together. These ‘collaboration frames’ revealed that members have very distinct assessments of the purpose, alignment priorities, requirements, and terms of engagement that will guide the work of the group. Furthermore, these frames are subject to two extreme polarities—action/urgency and time-giving/sense-making—that create divides in the ways that members view the approaches to collaboration.

At first glance, these divergent frames seem to pose a threat to collective agency since they are in conflict with one another. However, when the *temporality* and *sociality* of agency are considered as key factors in the exercise of agency, the picture becomes quite different. While the experience sets of organizational actors in GCs have predisposed them to group formation, the divergent collaboration frames become inherently useful in overcoming the frustrations of temporality and sociality, thereby contributing to the construction of collective agency. Specifically, within each polarity there are approaches to temporality and sociality

that orient toward different components of the “chordal triad” of agency described in the previous section (See also, Table 11: Polarities of Collaboration Frames):

- **Time-giving/sense-making:** Time-giving/sense-making relates to a more expansive view of time (‘openness’) and orients toward the **past (iterational)** and **present (practical-evaluative)** components of the chordal triad of agency, with action devoted to exploring and understanding, rather than pursuing strategic plans and future goals. Emphasizing the present orientation of sense-making, (Dorado, 2005, p. 389) explains, “Sensemaking behaviours are probable when the present is the dominant temporal orientation. These behaviours are likely to be connected to processes of change occurring in conditions of uncertainty”. The thinking pattern of this polarity is divergent, with a focus on understanding multiple histories, approaches and modes of solution-building. This polarity is also associated with increased sociality, aiming to maximize the heterogeneity of the group and engage in co-creation amidst diversity and emergence.
- **Action/urgency:** Action/urgency relates to a scarcity view of time (‘urgency’) and orients toward the **present (practical-evaluative)** and **future (projective)** components of the chordal triad of agency, with action devoted to strategic plans and goal setting. This polarity emphasizes convergent thinking, driving toward best practices and ideal policies. Dorado, p. (2005, p. 389) details the future orientation, writing “strategic behaviours encompass a future temporal orientation compatible with the imaginative generation of trajectories of action defined by actors’ hopes, fears, and desires for the future”. Based on its emphasis on action, this polarity points toward a selective view of sociality, driving toward decision-making by highlighting

specific practices, making distinguishments and deciding between distinct choices, and orienting fellow members toward specific roles.

In the case of individual and more homogenous forms of agency, the assessment of each temporal orientation is restricted to actors' predispositions, biographies, and cultural backgrounds. As Emirbayer & Mische, p. (1998, p. 973) write, "The ways in which people understand their own relationship to the past, future, and present make a difference to their actions; changing conceptions of agentic possibility in relation to structural contexts profoundly influence how actors in different periods and places see their worlds as more or less responsive to human imagination, purpose, and effort." Dorado (2005, p. 388) takes this one step further, making the case that one of the three forms of agency will dominate: "These three orientations operate in conjunction; all three are simultaneously involved in human agency but one will dominate. This paper suggests that actors adopt one of three forms of agency depending on which one is the dominant temporal orientation: routine (Giddens, 1984) when the past is dominant; sensemaking (Weick, 1995) when the present is dominant; and strategic (Dimaggio, 1988) when the future is the dominant temporal orientation held by institutional change agents."

However, in a heterogeneous collective environment such as Catalyst 2030, the different collaboration frames—with their polarized leanings—make it more likely that multiple temporalities will be in assessment continuously, and a single temporality will less likely dominate. Furthermore, with a far more diverse set of life experiences, cultural backgrounds and historical interpretations in operation, a heterogeneous collective has far more 'temporal content' to draw upon as members draw upon each other's assessments rather than solely relying on their own.

This dynamic work of delving into different temporalities is done both individually and

collectively. In my observations of Catalyst 2030, I noted how members were prone to shifting their frames, either adopting multiple frames or ‘trying on’ different frames as they progress with their engagement in the network. While some members maintained their frame or disengaged from the network (‘frame consistency’ and ‘frame mismatch’), in many instances, members actively changed their frames based on the groups in which they found themselves. Based on this frame dynamism, sub-groupings and the network as a whole were able to maintain a plurality of collaboration frames in their work together. Members often found this shifting between frames to be exciting and stimulating—signaling that this process felt meaningful and agentic.

I propose that this ‘frame plurality’—members with different dominant collaboration frames interacting with one another in the collective, and individuals shifting frames as they encountered other members—is an important feature of the agency of heterogeneous collectives. In contrast to individual or organizational agency, or even homogeneous collectives, where a single temporal orientation and/or assessment may tend to dominate—either due to personality, organizational or sectoral culture—in heterogeneous collective contexts, the scope for temporal orientation and assessment is wider and more varied. Based on Emirbayer & Mische (1998), this reconstruction of composition is the primary driver for agentic capacity. They write, “as actors alter or shift between their agentic orientations, dialogically reconstructing the internal composition of their chordal triad, they may increase or decrease their capacity for invention, choice, and transformative impact in relation to the situational contexts within which they act.” (Emirbayer & Mische, 1998, p. 1003) Applying this recomposition to the collective, I propose that different expectations and approaches to working together is a primary source of agentic capacity rather than a hindrance.

8.3 Relational Practices and Traversing the “Chordal Triad”

According to Emirbayer & Mische (1998, p. 974), “agency is always a dialogical process by and through which actors immersed in temporal passage engage with others within collectively organized contexts of action.” As we have seen above, heterogeneous collectives provide more dramatic scope for engaging with the different temporal orientations of agency, thus increasing the possibilities for agentic action. In addition to this heightened scope of possibilities, I propose that members of heterogeneous collectives—through their relational practices—also have a heightened ability to *traverse* the “chordal triad”, creating linkages between the three orientations that might not otherwise be possible or available to individuals, single organizations or homogeneous collectives.

Traversing the chordal triad is a critical contributor to agency for institutional change, and transcends specific GCs by allowing actors to consider, address, and ultimately (if needed) change the institutions that may be critical to addressing such challenges. These institutions are the foundational elements of why and how GCs appear to be intractable, including the power dynamics (who decides?), the inclusivity of the effort (who belongs?), the resourcing (who contributes? how are allocations determined fairly?), among many others. Moving between the temporal orientations of agency is identified by Emirbayer & Mische (1998, p. 964) as the means by which actors are able to “see”, and therefore change, the structures in which they are embedded: “As actors move within and among these different unfolding contexts, they switch between (or “recompose”) their temporal orientations—as constructed within and by means of those contexts—and thus are capable of changing their relationship to structure.” (Emirbayer & Mische, 1998, p. 964) However, as T. B. Lawrence & Phillips (2019) point out, the ability to move between temporal forms of action is under-theorized. In particular, we know very little about how actors move between past (habitual action) to present (practical-focused action) and to future (goal-oriented action). While these

two scholars point to the field of psychology to explain how individual actors perform this feat, I would suggest that much of this work is happening relationally (and specifically, dialogically, as I describe further below) in interstitial spaces such as heterogeneous collectives. That is, while individuals are psychologically capable of performing cognitive processes of decision-making (Kahneman, 2011) and moral judgment (Haidt, 2001), they are aided by relational spaces where heterogeneous conceptualizations of past, present and future are being traversed collectively. When these spaces are composed of actors with a “conscious sense of group as agent” (Cerulo, 1997, p. 393), members can engage in relational work which facilitates the traversal between temporal orientations.

As noted in the findings, I observed members of Catalyst 2030 performing distinct relational practices—legitimizing heterogeneity, wayfinding, and brokering—that aided in keeping the group together while performing institutional work. These types of work were stabilizing, maintaining the heterogeneity of the group while allowing for continuous learning and solutions-finding amidst complexity, evaluativity and uncertainty, thereby creating a balancing act between reflection and action. Notably, these types of relational practices are not only responsible for keeping members constructively interacting with different temporalities, but I would posit that they are important for moving *between* temporalities:

- **Traversing from past to present:** Legitimizing heterogeneity practices focus on establishing connections between heterogeneous actors so that they can engage deeply with their perspectives and experiences. This work is **temporally focused on the past**, ensuring that the collective incorporates as many ‘versions of the past’ as possible. Through various practices—democratizing, humbling and suspending—members performing legitimizing heterogeneity work are skilled at bringing the values, norms, and behaviours of diverse members (habitual actions, but in diverse

forms) into the collective conversation. By slowing down activities and ensuring repeated interactions and full listening, legitimizing heterogeneity elevates many interpretations of institutional arrangements, *bringing them from past into present*, so that they can be engaged with by members.

- **Traversing from future to present:** Wayfinding practices focus on guiding groups of members in a staged and emergent manner toward concrete action and shared agendas. This work is **temporally focused on the future**, ensuring that the collective imagines its way forward into possible futures. Through various practices— assembling and experimenting—members performing wayfinding work are skilled at merging multiple ideas and possibilities into coherent actions to achieve a future goal. By proposing small actions over long-term plans, wayfinding emphasizes experimentation, *bringing focus from future into present*, and overcoming hesitancy from members.
- **Traversing from present to past:** Brokering practices create the conditions necessary for repeated and constructive interactions between heterogeneous members, sustaining the purposeful, reflexive movement between temporalities and ensuring that members continue to traverse the “chordal triad” and do not become static in any of the three temporalities. This work is **temporally focused on the present** since it is concerned with the practicalities of keeping the group together to continue the collective work. Within the collective, this work *traverses present to past*, reminding collective members of the commitments and norms that they have built together and maintaining these institutionally.
- **Traversing from present to future:** Brokering practices also create the conditions

for members to bridge the collective's activities into the institutional field, external to the collective, possibly 'exporting' new norms and behaviours to the broader environments in which members perform their day-to-day activities. This constitutes *traversing from present to future*. In this traversing, members are **temporally focused on the future** and are able to see how the "proto-institutions" developed within the collective have implications for the broader institutional field and can imagine a future where these nascent institutions become part of the solution space for GCs.

- **Traversing from past to future:** By combining legitimizing heterogeneity and brokering practices, members may be able to make the larger leap *traversing from past to future*. In this traversing, heterogeneous actors engage deeply and fully with the diverse perspectives, histories, and life experiences of fellow collective actors on a repeated and ongoing basis, building relationships that are 'tribe-like' and familial, with a sense of 'we' that is beyond professional and instead kinship-oriented. In this traversing, actors are focused **simultaneously on the past and future** and feel a strong sense of shared responsibility that histories and future trajectories are inclusive of the collective experience.
- **Traversing from future to past:** By combining wayfinding and brokering practices, members may also be able to make the leap *traversing from future to past*. In this traversing, heterogeneous actors reimagine the past based on a new conceptualization of the future. Equally, in this traversing, actors need to have strong trust and bonds with fellow collective actors, since reimaging the past requires actors to let go of strongly held beliefs about past norms and beliefs, encapsulated in nostalgia and historical renderings that are held in common with shared identity groups. Similar to the large leap described above, in this traversing, actors are focused **simultaneously**

on the past and future and feel a strong sense of shared responsibility to create newly-rendered histories and future trajectories are inclusive of the collective experience.

With the depictions of collective agency in this and the prior sections, I will make a case of differentiation between collective forms of agency held by heterogeneous collectives and other more individual and homogenous forms. First, heterogeneous collective agency starts with a conscious sense of ‘we-ness’, formed from a common set of experiences that create a desire to ‘be together in the problem’ and a predisposition toward collaboration. Second, once organized into a collective, this form of agency builds from a more diverse scope within each temporal orientation, based on a plurality of collaboration frames ensuring that no single temporality will dominate the collective’s orientation. This is in contrast to individual and homogenous forms which are personally, culturally and historically more pre-disposed to certain orientations (Dorado, 2005; Emirbayer & Mische, 1998). Third, heterogeneous collective agency provides an enhanced ability to traverse the “chordal triad” due to the relational practices that are being exercised by members as they keep the collective together. While individual agency is concerned with cognitively and emotionally iterating between habitual, strategic, and pragmatic modes of agency, collective agency brings these iterations into the collective domain, multiplying the possibilities for each orientation as well as bringing forth combinations that would not be conceived in the individual mind. This conceptualization of agency is neither an ‘aggregated’ sum of individual agencies held by members, nor is it a ‘separate consciousness’ that is held by the collective apart from members. Rather, collective agency is a *facility* that enables a group to travel together between diverse compositions of each temporality and promotes more divergent iterations between the temporalities. Together, aided by the conscious sense of ‘group-ness’, collective

agency facilitates the iteration between ‘what has been’, ‘what will be’, and ‘what must we do’.

8.4 The Institutional Work of Heterogeneous Collectives

As cited in the literature review, T. B. Lawrence & Suddaby (2006, p. 216) define institutional work as “the broad category of purposive action aimed at creating, maintaining and disrupting institutions”. This area of scholarship brings attention to the social-symbolic efforts to “shape facets of organizational life” (Lawrence et al., 2013, p. 1024) and explores the practices that actors use to agentially perform this day-to-day work. In their latest summary of social-symbolic work, Lawrence & Phillips (2019) make careful effort to expand the ‘actor’ performing this work beyond single individuals, including organizations, collectives and networks. However, to-date, too little scholarship has explored the nature of collective agency, particularly that of heterogeneous groups, over individual agency in pursuit of institutional change.

In the sections above, I have arrived at three differentiators of heterogeneous collective agency: (1) a “conscious sense of group” (Cerulo, 1997, p. 393) that is based on common experiences (and resulting frustrations) inherent in complex, evaluative, and uncertain domains; (2) a heightened capacity to maintain a plurality of temporal orientations; and (3) an enhanced facility to traverse temporalities while assessing and pursuing possibilities for action. In this section, I will make the argument that these differentiators are especially useful for sustaining collectives that can develop “programs of action” (Lawrence & Phillips, 2019, p. 28) for institutional work.

This proposal is complementary to various accounts of agency for institutional change already present in the institutional literature, including “bottoms up” microprocesses of meaning-making (Gray et al., 2015), distributed and accumulative change (Dorado, 2005)

and even “hypermuscular” (Lawrence et al., 2009) versions described by institutional entrepreneurship scholars (Battilana et al., 2009; Hardy & Maguire, 2010). In each of these accounts, heterogeneity—whether by accident or design—is a trigger for contradiction (Seo & Creed, 2002), institutional incompatibilities (Battilana, 2004), and misfirings and laminations (Gray et al., 2015), which in turn facilitates the ability to “see” taken-for-granted institutional arrangements and consider the possibilities for change. By combining this commitment to heterogeneity with a multi-faceted view of agency, this study provides greater attention to the mechanisms used to purposively select different institutional arrangements for present and future “programs of action” (Lawrence & Phillips, 2019, p. 28).

Based on the distinctions outlined above, I would like to propose that the facility of collective agency is dialogic in addition to dialectical in nature. In my observations, the members of Catalyst 2030 were able to explore and traverse temporalities not through debates between their own individual machinations of the mind, but primarily in creative and constitutive dialogue with their fellow members. In this proposal, I am complementing many scholarly accounts of collective organizing, which use more politicized and confrontational forms of communication when describing the construction of agency. For example, Gray et al. (2015, p. 116) describe “active struggles and negotiations over meaning” while Ackermann et al. (2005) detail the various conflicts and power asymmetries in multi-organizational collaborations.

There is no doubt that I observed ‘contests’ about versions of temporalities and their meanings for courses of action; I am not denying that dialectics are in full form in heterogeneous collectives. However, the relational practices that I observed in Catalyst 2030 were primarily dialogic: instead of aspiring to arrive at ‘winning’ approaches or ‘aligned’ strategies, these practices were rather aimed at (1) extending participation to more heterogeneous members; (2) integrating plural contributions; and (3) sustaining engagement

(or forestalling disengagement) over time. In sum, these activities aspired to facilitate relational processes in addition to arriving at specific goals.

When applied to the empirical context of Catalyst 2030, the elevation of dialogue as the primary form of institutional work better explains the dedication of members to the relational work of legitimizing heterogeneity, wayfinding, and brokering. In these circumstances, members are not simply trying to arrive at the best possible solutions given the available set of known options; rather, they are engaging in a process of inquiry that expands the realm of possibilities. This mode of inquiry is eloquently described by Nilsson, p. (2015, p. 382):

That is, actors start with the awareness that they are not aware of all the different assumptions, values, and beliefs framing their institutional experiences. They catalyze agency not by understanding *how* their experience is institutionally constituted but by recognizing *that* their experience is institutionally constituted. And they express agency less through the development of projects focused on realizing particular institutional arrangements than through attempts to raise institutional conditions and possibilities into fuller consciousness. For example, inquiry-based agency may involve seeking contradictions by intentionally exposing oneself to diverse institutional fields or logics.

In this spirit of inquiry, dialogue is a means of creating an intersubjective relationship that facilitates understanding other members' "lifeworlds" Hamann et al. (2020, p. 9). Only when multiple perspectives and viewpoints are explored can decisions be made about appropriate contextual actions. This explanation more fully aligns with the version of collective agency that I have proposed, which involves the expansion of the scope of temporalities as well as the traversal between temporalities through the engagement with heterogeneous fellow actors in a collective that fosters a sense of 'we'.

Therefore, in addition to contests (Dacin et al., 2002) and competitions (Townley, 2002), heterogeneous collectives offer interstitial spaces where temporalities can be explored and traversed through dialogic relational practices. By opening up the 'black box' of heterogeneity and better elucidating the relational work that collectives perform to apply this heterogeneity to temporal orientations, we can more easily see how collective agency can

expand the repertoire of possible actions exponentially. In these circumstances, exposure to contradictions (Seo & Creed, 2002) is not a natural pre-cursor to conflict, but rather an opportunity to explore and create “programs of action” (Lawrence & Phillips, 2019) with a new and expanded set of institutional possibilities.

8.5 Constructing Collective Institutional Agency in Heterogeneous Collectives

In this final section, I will summarize a process model (Figure 1) for collective institutional agency, the facility by which organizational actors construct a “conscious sense of group as agent” (Cerulo, 1997, p. 393) in order to perform institutional work in addressing complex, uncertain and evaluative GCs. Although derived from a single case study of a heterogeneous participatory architecture (Ferraro et al., 2015), as seen in the above discussion sections, this process model draws upon significant scholarship in the fields of relational sociology (Emirbayer & Mische, 1998), collective identity and social movements (Cerulo, 1997; Melucci, 1989); cross-sector partnerships and organizational heterogeneity (Huxham & Vangen, 1996; Koschmann et al., 2012; E. E. Powell et al., 2017; Selsky & Parker, 2005); and, foundationally, institutional and social-symbolic work (Lawrence & Phillips, 2019; Lawrence & Suddaby, 2006) to consider how the findings deepen previous work on collectives and their agency toward institutional change.

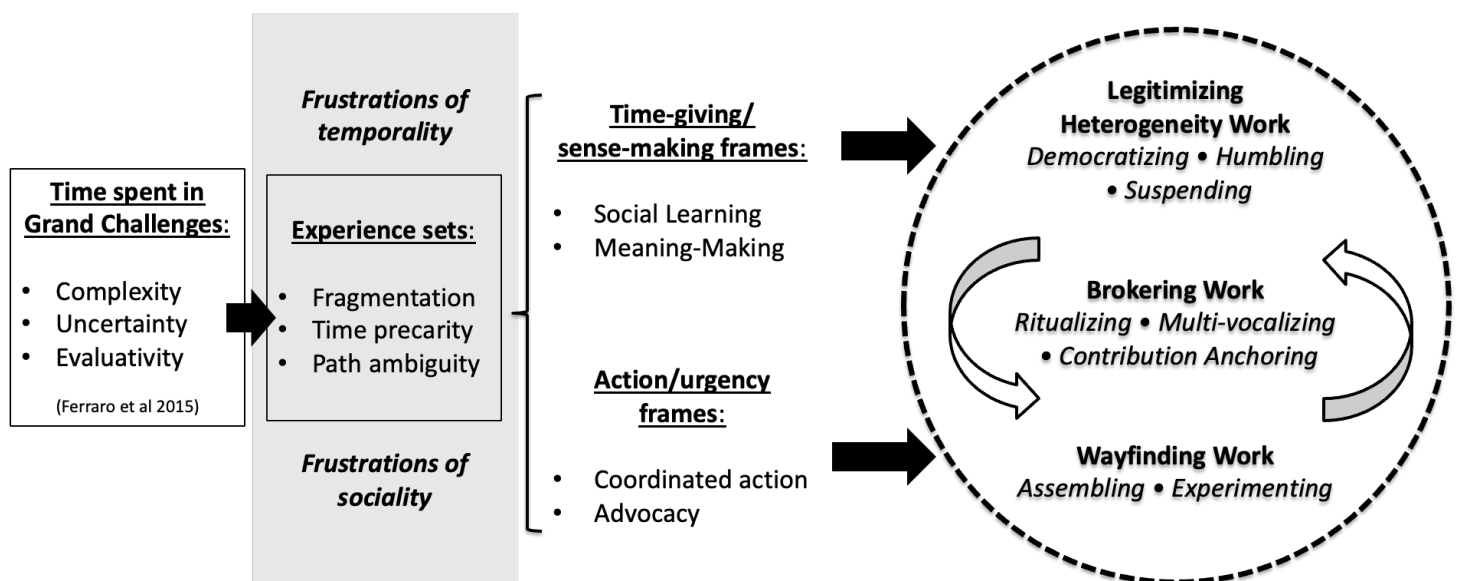
It is important to note that the arrows in the diagram reflect a *temporal ordering* of Findings 1 through 3, rather than an explicit causal relationship between the findings. This ordering is described below:

- Finding 1 relates to the Experience Sets that members developed *prior to* arriving into the collective space, and therefore reflect the perceptions-emotions-desires that contributed to the ambition to initiate collaborative work.
- Finding 2 relates to the Collaborations Frames with which members *arrived and*

began their work together in the heterogeneous collective, but precipitated the formation of collective agency. These diverse frames and the way in which they sort into polarities provided a generative space in which to encounter new and different ways of interacting with one another and meanings that arise from those interactions.

- Finding 3 relates to the Relational Work that happens *as the work unfolds within the heterogeneous collective*, ultimately creating the space in which collective agency arises, developed through a conscious sense of ‘we’ and an enhanced ability to traverse the ‘chordal triad’.

Figure 14: A Process Model for Collective Institutional Agency



Collective institutional agency is initiated by organizational actors spending time in GCs, challenges that are institutional in nature and uniquely complex, uncertain and evaluative (Ferraro et al., 2015). These types of challenges result in specific *experience sets* (perceptions-emotions-desires): *fragmentation*, *time precarity*, and *path ambiguity*. When organizational actors experience these factors, they are beset by frustrations of temporality

and sociality. Frustrations of temporality mean that actors do not feel that they have a correct or full assessment of historical interpretations or patterns, they are unclear about the set of future possibilities, and they are unable to make practical and normative judgments about present action. Frustrations of sociality reveal a difficulty in identifying the relational contexts where actors can engage with other actors to intersubjectively understand the temporalities of past, present and future. These frustrations are particularly vexatious to actors in GCs since they impinge the individual and organizational agency to identify solutions and address the challenge.

When harrowed by these frustrations, organizational actors become predisposed to organizing collectively with heterogeneous actors, believing that engaging with those who have different life experiences and interpretations of the issue will allow them to overcome barriers to individual and organizational agency. At the same time, other actors who may be heterogeneous in approach and background are nonetheless also experiencing similar frustrations due to the nature of GCs. These common experience sets in the context of GCs provide an early foundation for the “conscious sense of group” (Cerulo, 1997, p. 393) that characterizes collective agency. This desire to join together collectively and engage collaboratively can precede the formulation of the problem itself, and the selection of a desired solution, since the nature of these experiences means that actors may arrive to these types of collective arrangements with *less certainty* about how to address the issue than they engage in other, more goal-directed activities.

Despite common experience sets, heterogeneous actors arrive to collective structures with different expectations about how to work together. These *collaboration frames* mean that actors have different purposes, alignment priorities, requirements, and terms of engagement that they assign to collectives and their fellow members. Collaboration frames can be grouped together more generally into two polarities—the action/urgency side and the

time-giving/sense-making side. Although these divergent approaches to collaboration create friction between members, they are ultimately productive because they provide an impetus for the group to spend sufficient time and energy devoted to exploring the past, present, and future aspects of GCs.

Productive tension between members with divergent collaboration frames and their dominant approaches to time and sociality are not guaranteed. Rather, collectives require members to perform relational forms of institutional work that ensure the traversal of temporal orientations and provide for the agentic capacity of the group. Three types of relational work are part of this process. *Legitimizing heterogeneity* practices ensure that actors forge deep connections with heterogeneous members and engage with their perspectives and experiences. *Wayfinding* practices guide groups of members in a staged and emergent manner toward concrete action and shared agendas. Finally, *Brokering* practices create the conditions necessary for repeated and constructive interactions over a sustained period of time. While debate and contestation are present, these interactions are primarily enlivened by dialogue, or the creative search for new compositions of understanding that build a relational whole rather than diminishing or dominating individual actors or positions. The combination of these three types of relational work—legitimizing heterogeneity work, wayfinding work, and brokering work—sustains a plurality of approaches to collaboration and creates a recursive cycle of action and reflection that invigorates collective agency. Counter-productively, when one of these sets of practices is absent or weak, the cycle can break down and actors may feel a sense of disillusionment or disengagement.

When heterogeneous organizational actors derive a sense of ‘we-ness’ and capacity for agency amidst the complexity, uncertainty and evaluativity of GCs, the opportunity to perform institutional work is heightened. Interestingly, the institutional work of heterogeneous collectives has internal and external aspects. The literature is clear that

heterogeneity is a trigger for new institutional forms to be inspired and to take root. Drawing upon Gray et al. (2015) microprocesses of institutionalization, institutional disruption and creation work may first happen internally as actors are exposed to new institutional arrangements through their fellow members (“frame breaks”, pg 119), or create them together by new combinations (local “rekeyings”, pg 120). This institutional work may then move externally, as organizational actors return to their contexts with new institutions that have relevance and salience (“amplification”, pg 120). Yet, as a collective matures, these new institutional forms become internally normative and require maintenance work in order to be sustained. New members with different heterogeneous characteristics may decide to disrupt and create institutions further. It is through the cycle of reflection and action across temporalities that members must collectively determine whether these aberrations are incorporated into the collective or whether maintenance work should be performed to stabilize the collective further.

In summary, collective institutional agency is a *facility* whereby heterogeneous organizational actors with common experience sets of GCs can derive a sense of ‘we-ness’ while creating a cycle of reflection and action to perform institutional work both internally and externally. There is no ‘arrival point’ where collective agency has been achieved; rather, it is being continuously formed and re-formed, fueled by dialogue and kept in relational balance by repeatedly coming together over a sustained period of time, and iterating between learning and acting together. This continuous process, invigorated by heterogeneity, produces new institutional configurations that have the potential to move internally to externally, influencing other actors in the institutional field. Importantly, it is not a simple aggregation of individual or organizational agency, or the ‘winning’ of ideological or institutional stances over others, but rather an iterative and evolving meaning system that shapes and morphs through continuous interaction—in short, staying together while learning and acting.

9. Conclusion

This study aims to provide contributions to both theory and practice, situating itself within the conversation of 'institutional work'—and the broader 'social-symbolic work' literature—while responding to calls to study “institutions that matter” (Hampel, Lawrence, & Tracey, 2017, pg 561, 580). By joining with other scholars who have moved beyond "hypermuscular" (Creed et al., 2010; Lawrence et al., 2009) versions of institutional agency, this research empirically explores the agency of a heterogeneous collective in addressing the grand challenges (GCs) of our time. By delving deeply into the experiences and relationships of organizational actors within a single, rich case study, the study contributes to the theoretical understanding of how diverse organizations come together to generate a strong sense of 'we' while developing an agentic capacity beyond their individual and organizational spheres.

9.1 Contributions

In a "taking stock" article by Hampel et al., 2017, the scholars noted that "largely missing in research to date has been the collaborative work of heterogeneous networks of actors, which may be especially important in institutional work that is concerned with shaping large-scale institutions" (p. 560-561). Lawrence & Phillips (2019) build upon this by describing that “the relational dimension is central to our conception of social-symbolic work, and yet research on institutional work tends to leave this dimension implicit or overlooks it entirely” (p. 203). This study aims to fill these gaps, by exploring the experiences, expectations, and relational work of a collective of heterogeneous organizational actors in an issue-based institutional field that has arisen in response to GCs.

The specific contributions of this study include the following:

- **An exploration of the subjective experience of heterogeneous organizational actors operating within GCs and a revisitation of the pre-conditions for engaging in collective efforts:** This study describes how heterogeneous organizational actors undertaking institutional work to generate large-scale societal change experience issue-based institutional fields such as GCs. To describe the experiences of organizational actors, the study introduces a novel breakdown of subjective experience into *experience sets* comprised of perceptions, emotions and desires. These experience sets contribute to the overall efforts of institutional work scholars to incorporate subjective experience into accounts of institutional work (Lawrence, 2017; Nilsson, 2015). Additionally, by exploring the experiences of organizational actors in an institutional field, the study highlights how these subjective and intersubjective experiences create the means of working together prior to a shared formulation of the problem and/or goals. This suggests that studies which make the formulation of problems and shared goals a pre-condition for collective action (Fjeldstad et al., 2012; Gerlak & Heikkila, 2006) may need to be revisited and extends the pragmatist philosophy and “robust action” scholarship on participatory architectures introduced by Ferraro et al., 2015. It also
- **A typology of frames outlining the diverse expectations with which heterogeneous organizational actors arrive to collective structures:** The study contributes to the literature on Grand Challenges (GCs), cross-sector partnerships and collaboration by creating a typology of ‘collaboration frames’ which organizational actors use to engage with collective structures. This research builds upon framing theory in the processual, interactionist approach employed by Gray et al. (2015) to

understand the various expectations that organizational actors bring to collective structures. These frames provide differentiating features in the expectations of actors, including diverse purposes, alignment priorities, requirements of fellow members and terms of engagement. Once engaged with fellow actors in the collective, these collaboration frames are neither static nor singular; actors use these frames to navigate, explore, and evolve their participation with the group. This frame plurality is productive since it ensures that actors engage in various relationships across the network and sustain their engagement in the collective structure. The research provides rich insights into facets of heterogeneity that go beyond affiliation with legal forms and business models and that make up heterogeneous collectives, particularly in the context of complex, uncertain and evaluative GCs.

- **Three types of relational work that harness the productive tension of action and reflection while sustaining collective engagement:** Social-symbolic work scholars have only just begun to explore the relational dimension of institutional work (Bertels et al, 2014; Lawrence & Phillips, 2019). To-date, most of these accounts have focused on conflict, competition and contestation as the sites of “struggles and negotiations” (Gray, Purdy & Ansari, 2015 pg 116) which lead to institutional change. This research proposes an additional, possibly more generative, interstitial space where these struggles and negotiations can be carried out: the heterogeneous collective. Through relational work practices that foster a balancing act between action and reflection—and sourced from collaboration frames that add layers of heterogeneity to the collective—heterogeneous collectives engage organizational actors in productive and dialogical tension that does not have to resort to binary contests or reductive competitions. These relational work practices allow actors to maintain their

heterogeneity while expanding to include diverse perspectives and carrying out composite actions and experiments that are well-suited to the complex, uncertain and evaluative contexts of GCs.

- **Theory-building around collective agency as a *facility* that allows actors to traverse temporalities, contributing to collective agency and institutional work:**

Previous accounts of collective agency have been limited to studies of collective identity (Cerulo, 1997; Melucci, 1989) and/or summations of individual agency driven by leadership (Huxham & Vangen, 2000). This research has built upon the groundbreaking work of Emirbayer & Mische (1999) to posit that collective agency is instead a *facility* that allows for expanded scope of temporal understanding (understandings of histories, possibilities and present affordances) as well as a heightened ability to traverse the “chordal triad”, creating linkages between the three orientations that might not otherwise be possible or available to individuals, single organizations or homogeneous collectives. The study contributes a process theory of *collective institutional agency* whereby heterogeneous collectives join together due to frustrations of temporality and sociality caused by GCs, arrive with differing frames for collaboration that sustain and deepen engagement in a wider scope of different temporalities, and engage in relational work practices that provide opportunities to more readily traverse the “chordal triad” of agency. This facility is animated by dialogue, as opposed to dialectics, which does not presuppose that one side or solution will ‘win’ but rather that new variations and combinations may arise through deep engagement with diverse ideas. This conceptualization of collective agency is offered in order to provide a more generative space for the study of the collective actor in institutional work, moving beyond narrow identity-based definitions that presume

common ground or elite leadership as a precursor to the development of collective capacity.

9.2 Limitations of the Research

This study acknowledges several limitations. First, although the study aimed to identify a rich case study that spanned significant geographic and contextual scope, single case studies are inherently limited in their generalizability. By providing thick description of the case study in question, I hope that readers and researchers building on my findings will be able to judge applicability to their own contexts. Second, as a process study of institutional agency, the research timeline and data collection methods were insufficient to document systematic change in relationships and overall institutional change in GCs. Therefore, the research relied on participant reflections of past experiences, motivations, and relationships, which were (by their nature) influenced by present orientations. The research protocol was designed to provide opportunities to augment these reflections (in particular, a review of historical meeting minutes in the archival data and observation of present interaction between participants), however it is acknowledged that these historical personal narratives will always be shaped by time. Finally, the subjective nature of the study may prove limiting in that participants were asked to interpret their own experiences using language to bring forward feelings and experiences that are often held subconsciously. This is a difficult exercise, particularly when subject to time limitations. The research tried to overcome these limitations by: spending significant time with research participants to establish rapport and trust prior to delving into experiential conversations; using techniques such as timeline mapping to surface deeply-held beliefs and experiences; using multiple data collection formats, including extensive participant observation; and using archival data to increase the reliability of self-reported interview data.

9.3 Implications for Further Research

The scholarly conversations in which this study are situated are vibrant and active, and the areas for exploration are continually being refreshed as new studies emerge. In particular, the interest in heterogeneous collectives and grand challenges continues to grow, and could easily form the basis for several lifetimes of work. With that in mind, and based on the contributions and limitations outlined above, I can suggest several future research directions:

- **Within the scholarly conversation of ‘social-symbolic work’, exploring linkages between organizational work and institutional work:** Over the course of this research study, the conversation about ‘institutional work’ broadened and deepened, with Lawrence & Phillips, 2019 publishing their significant work, *Constructing Organizational Life* that expands the inquiry of institutional work to the wider ‘social-symbolic work’. This elaboration allowed me to situate this study within a larger picture of ‘work’ and see further avenues for research. Although this study was focused on the relational dimension of institutional work, I also observed many instances of organizational work occurring within the member organizations and the network itself which contributed to collective agency or institutional work or both. Based on these observations, I surmise that there are important linkages between organizational actors performing organizational work and building collective agency to perform institutional work simultaneously. Questions might include: What types of organizational work contribute to collective institutional agency? How does the institutional work of collectives inform and contribute to organizational work? How do the relational dimensions of organizational work and institutional work build upon each other and/or allow one type of work to reinforce the other?

- **Understanding the relationships between experience sets, collaboration frames, and relational work:** Through the data analysis, I became intrigued about the relationship between the three sets of Findings, however the data that was collected and the timeframe available for data collection was unfortunately insufficient to explore this in detail. I believe there is likely an interesting set of relationships between the experience sets that actors held, the collaboration frames that they then assumed, and finally the relational work that they performed in the context of Catalyst 2030. For example, I anecdotally observed that members with greater comfort with the experience set of *path ambiguity* were more likely to assume a collaboration frame in the *time-giving/sense-making polarity*. These members also may have gravitated toward playing a role of *legitimizing heterogeneity*. While the data that I collected could not provide these answers, I think they are interesting and important avenues to explore. This could have important theoretical implications for the types of actors that serve to sustain engagement in heterogeneous collectives, and practical implications for organizers of heterogeneous collectives addressing GCs.
- **Problematizing the ‘organizational actor’ and understanding how ‘collective experiences’ contribute to ‘collective agency’:** Building on the research direction above, and noting the early work in this study on the subjective experience of actors, I believe there are important questions to be answered about the nature of the organizational actor within collectives and GCs generally. Meyer & Jepperson (2000, pg 100) began the process of problematizing the “core conceit of modern culture”—that actors are not products of context and culture. Given the trajectory of this research, I have tended to agree that ‘organizational actors’, particularly those studied within societal challenges such as GCs, are an imperfect and problematic placeholder for the truly intersubjective nature of the actor and their work. More forcefully, I

would say that organizational actors create false boundaries between the lived experience of individuals and their engagement as organizational representatives or agents. Therefore, I believe that institutional scholarship would be aided by a more nuanced account of the complexity of how individuals and organizations participate in societal GCs as agentic actors. Questions could include: What are the composite characteristics of organizational actors, and how do organizational actors carry subjective experiences into their engagement as organizational agents? How do subjective experiences get 'joined up' between organizational actors to form 'collective experiences'? What might be the linkage between 'collective experiences' and 'collective agency'?

- **Constructing definitions and/or typologies of heterogeneous collectives to create linkages between literature domains, scholars, and practice:** In conversations with both practitioners and scholars throughout my research study, I found that understanding was often hindered by a lack of shared terminology for the research subject of the study: the heterogeneous collective. In fact, a significant portion of my literature review was devoted to developing a definition of the collective (Chapter 2.4) and although I was able to craft a starting point by linking several literatures together, I never felt truly satisfied by this effort. In the practitioner realm, this issue is exacerbated when actors who do not know each other fail to appreciate and/or learn from each other because they use different terms for their collectives and activities. Activists who develop movements are not necessarily familiar with social entrepreneurs who create collaborative networks; transnational movement leaders are not always in conversation with philanthropic 'systems changers'. In each of these examples, learning and connection between actors addressing GCs is lost or missed. I can visualize further research to create typologies or shared terminologies so that

scholars as well as organizers of heterogeneous collectives can avoid these missed opportunities. Questions could include: What are the different types of heterogenous collectives? What types of governance structures, organizing models, and collective activities are shared and/or differ across these types? What is the nature of ‘collective agency’ in these types, and how is the construction of agency similar or different across types?

- **Conducting further exploration of Wayfinding Work in more mature**

heterogeneous collectives: One of the drawbacks to studying a collective in the early stages of formation was less opportunity to observe the practices of Wayfinding Work in more detail. Based on the observation period, I found this work to be particularly intriguing, but less in evidence than the other types of relational work that I described in the Findings sections. I believe that observing more mature heterogeneous collectives could offer additional insights into how this work is conducted and the practices that underpin it. Questions could include: How does experimentation allow heterogeneous organizational actors to move forward amidst uncertainty? How do heterogeneous collectives facilitate learning while Wayfinding so that evaluativity can be diminished and/or transformed while addressing GCs? How do participants in heterogeneous collectives gain skills for Wayfinding so that they can move groups from future visioning to present action?

9.4 Practical Implications for Heterogeneous Collectives

Based on the contributions and limitations outlined above, I can also suggest several practical considerations for leaders and organizers of heterogeneous collectives:

- **Organize around shared experiences before shared goals:** One of the more surprising findings of the study was that organizational actors joining and engaging in heterogeneous collectives often did so without explicit collaboration-level objectives and goals. Rather, they joined and initiated collaborations based on shared experiences with the expectation that goals would follow. Based on this finding, I would suggest to organizers of heterogeneous collectives that bringing up shared goals in the initial stage of organizing can, in fact, be counterproductive. Rather, organizers should focus on the shared experiences that bring the participants together and use this shared foundation to build shared values and trusting relationships prior to goal formation.
- **Create opportunities for members to interact with those who have different collaboration frames, but broker relationships with care:** Members will likely generate more nuanced strategies if they interact and collaborate with fellow members with diverse collaboration frames. However, these relationships require careful attention since they can break down if members do not feel that their purpose, priorities, requirements or terms of engagement are being met. Therefore, organizers should check in regularly at the beginning of collaborative work to ensure that members are progressing in their collaborative efforts. Check-ins are not about shaping collaborations, but rather as opportunities for Brokering Work (ritualizing, multi-vocalizing, and contribution anchoring). These practices ensure that members are repeatedly coming together, seeing value in the interactions and understanding their role in the interactions.
- **Make sure that collaborations have a balance of work practices:** In several cases,

I witnessed sub-groupings that leaned heavily toward one aspect of relational work due to a dominant polarity in the group. These sub-groupings often stagnated because they either spent too much time in exploration mode or went too quickly into action. Organizers can prevent this by ensuring that sub-groupings have a balance of members who are performing both the three types of relational work. If sub-groupings are struggling to generate ideas, find pathways for action, or create the rituals and conditions necessary for repeated interaction, it could be useful to look closely at the membership and introduce a greater diversity of members with different collaboration frames into the mix.

- **Multistakeholder partnerships and processes can learn from ‘self-organized’ heterogeneous collectives:** Some readers of this study might be reluctant to generalize from the experience of Catalyst 2030—notably, a ‘self-organized’ heterogeneous collective—to those heterogeneous collectives that are more formal in nature, for example those organized around a discrete GC or in a definable region. Based on this study, I believe the implications to still have relevance with practical implications across the spectrum of heterogeneous collectives. Specifically, problem-oriented and place-based collectives often encounter engagement and sustainment issues when GC definitions change dramatically as actors interact. In the ‘self—organizing’ collective, as demonstrated by Catalyst 2030, this evolution is anticipated, but in more formal collectives, this evolution can lead to fracture and disengagement. The relational work revealed in this study can likely keep the group together when this happens, providing a set of practices that organizers can use in order to avoid abandonment.

9.5 Concluding Remarks

It has been a professional and personal privilege to spend the last two years with the members of Catalyst 2030. I began this research with tremendous respect for the founding members and their laudable track record of growing inspiring organizations that have improved the quality of life for so many around the world. This respect has only grown deeper and more profound in the intervening period by observing the humble and tenacious ways in which this group has expanded to ‘join the dots’ between social entrepreneurs, policymakers, private sector intrapreneurs, academics, philanthropists, financiers, and more. I had early and misplaced intentions of remaining a ‘passive observer’ through the research period. These intentions were quickly superseded by the exuberance and power of this wholehearted group of social purpose leaders. I realized that to understand collective agency is to experience it—and experience it, I most certainly did.

I have come to believe through this study that the most important work in our time of great polarization and upheaval is to foster interactions and collaboration between diverse individuals, organizations, and communities. This work is simple but hard. It first entails getting people to engage with one another, even to confront one another, across boundaries of difference. Then, it involves keeping people in relationship with one another, doing tasks together, so that trust forms and grows. It is often only in this mode that people are willing to step away from individual agendas and organizational mandates to embark on truly collaborative work. Too often, studies start after this critical foundation has already been accomplished and overlooks the critical work that keeps people together while they get started. Catalyst 2030 has shown me that this is where the ‘magic’ happens. To overlook it is to misunderstand the nature of collective action: why people come, why they stay, and what they actually do in the interstitial spaces of collective action.

We are living in an era of growing global collective action (Hawken, 2008). As collective

action, movement building, and collaborative projects become more prevalent, and as the technologies and tools to connect with one another become more sophisticated and widespread, there will be searches for shortcuts and quick wins. However, this research suggests that sidestepping the process of collective agency building will not get us to the solutions that our grand challenges require. Rather, we need *many* solutions proposed by a *multitude* of actors, and, most importantly, a relational fabric that allows us to ‘see’ each other and the contributions that we each bring. The work of ‘staying together while learning’ is too rarely lauded or celebrated; it is much easier to tell the far simpler stories of silver-bullet solutions, heroes, and saviors. Yet, this is truly the work of our time: to step across boundaries of difference, to embrace a plurality of contributions, and to work together, even when it is hard, even when it seems impossible. This ability to be more together than we are individually is the essence of humanity, and the ability to do it across bigger and more complex groups has been the story of our time on earth. Let’s keep the story going.

Appendices

Appendix A: Semi-Structured Interview Protocol

How would you best identify your organizational base or affiliation?

- Civil society
- Social movement
- Social enterprise
- NGO / nonprofit organization
- Public sector / government
- Multilateral / bilateral / regional funding agency
- Philanthropic funder
- Academic institution
- Private sector
- Other _____

Question Set 1: How and why did you become involved with Catalyst 2030? What did you hope to achieve, organizationally and personally?

Question Set 2: How closely has the involvement with C2030 resembled your early aspirations? What has changed over the course of the work and why? Can you describe a/three pivotal moments in the process?

Question Set 3: What were the enablers of this outcome? What were the obstacles? Did these vary by the different actors/contributors/partners?

Question Set 4: What was your experience of your own role and your work in this process? Can you choose 3 words to capture your experiences?

Question Set 5: What relationships have you developed in the process? How would you describe the quality of these relationships? What relationships did you lean upon/gain strength from through the process? What relationships have been challenging for you? Did these vary by actor types?

Question Set 6: In your work, for each key actor group (from the groups above): Do you currently work with the [group]? Why or why not? What do you expect from the [group]? What do you NOT expect from the [group]? Does this [group] deliver on your expectations? Why/How?

Question Set 7: What other types of collaboration have you engaged in? How are your collaborations with Catalyst 2030 members different from collaborations you have had elsewhere?

Question Set 8: Is Catalyst 2030 in the process of becoming what you want it to be? What priorities do you have for Catalyst 2030 in the coming year, 3-5 years?

Appendix B: Informed Consent Form

Name of Researcher(s)
Cynthia Schweer Rayner Mobile: +13467329715 Email: scheyn001@gsb.uct.ac.za
Title of study <i>(to be completed by the researcher)</i>
RELATIONAL WORK & THE CONSTRUCTION OF COLLECTIVE INSTITUTIONAL AGENCY

This research has been approved by the Commerce Faculty Ethics in Research Committee.

Please read and complete this form carefully. If you are willing to participate in this study, ring the appropriate responses and sign and date the declaration at the end. If you do not understand anything and would like more information, please ask.

- I have had the research satisfactorily explained to me in verbal and / or written form by the researcher. YES / NO
- I understand that the research will involve interviews and possible participation in a focus group session/workshop. YES / NO
- I understand that I may withdraw from this study at any time without having to give an explanation. YES / NO
- I understand that all information about me will be treated in strict confidence and that I will not be named in any written work arising from this study unless I give my permission. YES / NO
- I understand that any audio or video material of me will be used for research purposes and will only be distributed beyond the study with my written consent. YES / NO
- I understand that you will be discussing the progress of your research with others at the University of Cape Town Graduate School of Business and the University of Oxford. YES / NO

I freely give my consent to participate in this research study and have been given a copy of this form for my own information.

Agreed by:

Signature

Name

Title

Appendix C: Data Management Protocols

Qualitative and quantitative data will be collected as part of the project and will be available for sharing in raw or aggregate form. Participants will provide written consent for data collection and will be given the opportunity to remove and/or de-identify interview data by request. We may choose to present data at an aggregated level as needed to maintain confidentiality.

The following procedures will be used to maintain data confidentiality:

1. The principal investigator on the project (Cynthia Schweer) will be the data steward during data collection, coding, analysis, and publication phases of the project and will be responsible for documenting and managing the data throughout this time.
2. Data will be housed in a password-protected laptop computer and/or a password-protected cloud software platform.
3. When participants give consent and are enrolled in the study, each will be assigned a unique identification number. This ID number will be associated with all individual participant data that are collected, entered, and analyzed for the study.
4. The link between participants' names and study ID numbers will be kept in a separate electronic file, ensuring that all data prepared for analysis are de-identified. Directly identifying information will never be maintained in the same files.
5. The complete dataset is expected to be accessible to select organizations after the study. The final data file to be shared will include raw item-level data with de-identified data as requested by participants.
6. When we collect audio/video data, participants will sign a release form that provides options to have data shared with project personnel only and/or for sharing purposes. We will not share audio/video data from people who do not consent to share it, and we will not publicly share any data that could identify an individual without permission.

Appendix D: Ethics Approval Letters



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UCT Commerce Faculty Office

05/06/2020

Cynthia Schweer Rayner
Graduate School of Business
University of Cape Town
REF: REC 2020/03/004

RELATIONAL WORK & THE CONSTRUCTION OF COLLECTIVE INSTITUTIONAL AGENCY

We are pleased to inform you that your ethics application has been approved. Unless otherwise specified this ethical clearance is valid until 30-Jun-2021 .

Your clearance may be renewed upon application, and incorporates amendments up to and including those captured on 03-Jun-2020 .

Please be aware that you need to notify the Ethics Committee immediately should any aspect of your study regarding the engagement with participants as approved in this application, change. This may include aspects such as changes to the research design, questionnaires, or choice of participants.

The ongoing ethical conduct throughout the duration of the study remains the responsibility of the principal investigator.

We wish you well for your research.

A handwritten signature in black ink, appearing to read 'JRousseau'.

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Cynthia Schweer Rayner
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REF: REC 2021/10/008

RELATIONAL WORK & THE CONSTRUCTION OF COLLECTIVE INSTITUTIONAL AGENCY

We are pleased to inform you that your ethics application has been approved. Unless otherwise specified this ethical clearance is valid until 31-Dec-2022 .

Your clearance may be renewed upon application.

Please be aware that you need to notify the Ethics Committee immediately should any aspect of your study regarding the engagement with participants as approved in this application, change. This may include aspects such as changes to the research design, questionnaires, or choice of participants.

The ongoing ethical conduct throughout the duration of the study remains the responsibility of the principal investigator.

We wish you well for your research.

A handwritten signature in black ink, appearing to read 'JRousseau'.

2021.10.22
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Appendix E: List of Interviewees

Interview Number	Actor Type	Region
1	Social Enterprise	Asia Pacific
2	NGO/Non-Profit	Africa
3	Civil Society	Middle East
4	Social Enterprise	North America
5	Social Enterprise	Asia Pacific
6	NGO/Non-Profit	Asia Pacific
7	Social Enterprise	Asia Pacific
8	Social Enterprise	Africa
9	Philanthropic Funder	North America
10	Philanthropic Funder	North America
11	NGO/Non-Profit	Europe
12	Civil Society	Asia Pacific
13	Philanthropic Funder	North America
14	Social Enterprise	Asia Pacific
15	NGO/Non-Profit	Europe
16	Social Enterprise	Europe
17	Civil Society	North America
18	Social Enterprise	Africa
19	Social Movement	Europe
20	Social Enterprise	Europe
21	Social Enterprise	Europe
22	Social Movement	Europe
23	NGO/Non-Profit	Latin America
24	Philanthropic Funder	North America
25	NGO/Non-Profit	Latin America
26	NGO/Non-Profit	Middle East
27	Social Enterprise	Europe
28	NGO/Non-Profit	Latin America
29	Social Enterprise	North America
30	Philanthropic Funder	North America
31	Philanthropic Funder	North America

Interview Number	Actor Type	Region
32	Social Movement	North America
33	Social Movement	North America
34	Academic	North America
35	Social Movement	North America
36	Social Enterprise	North America
37	Social Enterprise	Asia Pacific
38	Social Movement	Europe
39	NGO/Non-Profit	Europe
40	Private Sector	Europe
41	Private Sector	Europe
42	NGO/Non-Profit	Latin America
43	NGO/Non-Profit	Europe
44	Social Enterprise	North America
45	NGO/Non-profit	Europe
46	Social Enterprise	North America
47	Civil Society	Europe
48	Social Enterprise	Europe

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