



# Systemic Impact

*Strategy Design and Planning Template*

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## About This Planning Template

In January 2025, Bellwether launched an initiative to explore strong practices in Systemic Impact (how an organization shifts mindsets, relationships, and power to in turn shift policies, practices, and resource flows to create conditions for systems-level adoption of an organization's program model).<sup>1</sup> **Learn more by reading Bellwether's Systemic Impact series:**

1. The Only Path to Scale, Success, and Sustainability
2. Systems, Markets, and Infrastructure
3. Mapping Authority in Postsecondary Systems
4. Introduction to Designing Effective Strategies
5. Designing and Executing Effective Campaigns
6. Using Measurement to Manage, Maximize, and Demonstrate the Value of Campaigns
7. The Importance of Implementation

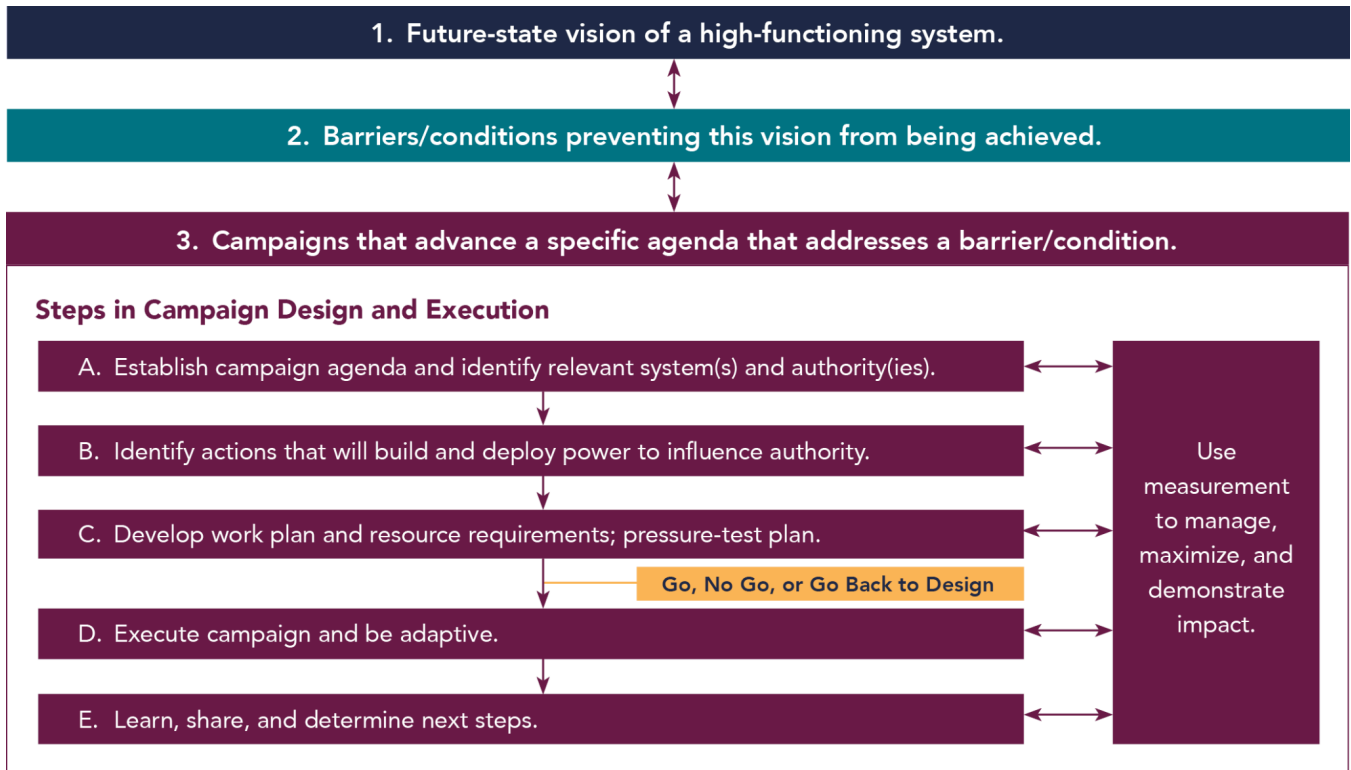
This planning and design template is a companion tool to the broader Systemic Impact series. Organizations pursuing Systemic Impact can use these guiding questions to design their Systemic Impact strategies, including specific campaigns.

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<sup>1</sup>John Kania, Mark Kramer, and Peter Senge, The Water of Systems Change (FSG, 2018).

# Design Elements of a Systemic Impact Campaign

Organizations must clearly articulate their answers to the following when designing and executing a Systemic Impact strategy.



# 1. Future-state vision of a high-functioning system.

Considerations and Guiding Questions	Organization's Answers
What is the <b>target population</b> included in this future-state vision?	
What are they <b>able to achieve</b> in this future-state vision?	
How does a <b>transformed system function, and what does it do</b> for the target population to realize the vision? Who is involved in delivering this transformed system, and how are they resourced?	
What role have the <b>communities</b> most impacted by this future-state vision had in answering these questions?	

## 2. Barriers/conditions preventing this vision from being achieved.

Considerations and Guiding Questions	Organization's Answers
<p><b>What are the barriers preventing this future-state vision, and why do these barriers exist?</b> Where did they originate? Does a barrier exist because of policies, funding, historic practices, or market conditions?</p>	
<p>Are there particular, established <b>mindsets</b> that created and continue to sustain these barriers?</p>	
<p>Does a barrier exist within a <b>single system</b> or because of the <b>interactions between multiple systems</b>?</p>	
<p>What role have the <b>communities</b> most impacted by these barriers had in answering these questions?</p>	

### 3. Campaigns that advance a specific agenda that addresses a barrier/condition.

#### A. Establish campaign agenda and identify relevant system(s) and authority(ies).

Considerations and Guiding Questions	Organization's Answers
<p><b>Agenda:</b></p> <ul style="list-style-type: none"> <li>● What are the specific, <b>measurable objectives</b> of a campaign, aligned to addressing specific barriers that, if achieved, will determine a campaign's success?</li> <li>● What role have the <b>communities</b> most impacted by these barriers had in developing a campaign agenda?</li> </ul>	
<p><b>System:</b> In which system or systems do(es) the decision(s) about policy, practice, and resource flows live?</p>	
<p><b>Authority:</b> Who has authority within that system (or systems) to make the decision to support or block the agenda?</p>	
<p><b>Measurement Considerations:</b></p> <ul style="list-style-type: none"> <li>● What <b>value</b> is this campaign seeking to create and for which individuals? <ul style="list-style-type: none"> <li>○ What is the <b>problem/opportunity</b> this campaign is seeking to address?</li> <li>○ What is the <b>quantified value of successfully addressing</b> this problem/opportunity?</li> </ul> </li> </ul>	

## B. Identify actions that will build and deploy power to influence authority.

Considerations and Guiding Questions	Organization's Answers
<p><b>Power Mapping:</b></p> <ul style="list-style-type: none"><li>• Who are all of the stakeholders to consider?</li><li>• How does power currently flow among stakeholders to influence those in authority, including between an organization and other stakeholders?</li><li>• Where is there support for the campaign agenda? Where is there potential to gain support? Where is there opposition?</li><li>• Where does the organization need to build power and/or support to influence those in authority?</li></ul>	
<p><b>Actions:</b> What are the specific actions the organization (or other stakeholders) will take to build and exert power to advance the campaign agenda?</p>	

**Measurement Considerations:**

- What are current **levels of relationships, influence, and support**? How are they evolving over time as the campaign progresses?
  
- **Which actions and in what quantities need** to be taken to build and deploy power to influence specific stakeholders for specific purposes that advance a campaign?
  - What is the **purpose** of each action?
  
  - What is the **measurable level of program/activity** for each action?
  
  - What are the target **outputs and outcomes** of each action?
  
  - How is each action, where relevant, building an **infrastructure** of community power?

## C. Develop work plan and resource requirements; pressure-test plan.

Considerations and Guiding Questions	Organization's Answers
<p><b>Work Plan:</b></p> <ul style="list-style-type: none"> <li>• What is the desired timeline for campaign execution?</li> <li>• What are the milestones of progress and when will they occur?</li> <li>• What are the major steps that must occur and in what sequence?</li> <li>• Who is responsible for each step?</li> </ul>	
<p><b>Resource Requirements:</b></p> <ul style="list-style-type: none"> <li>• What resources (time, talent, systems, partners) are required to execute this campaign?</li> <li>• What funds are available, and what fundraising is needed?</li> </ul>	
<p><b>Pressure-Test:</b></p> <ul style="list-style-type: none"> <li>• Does the organization have the right skills, capacity, and funding to execute this campaign?</li> <li>• Where does this campaign sit relative to the organization's other priorities?</li> <li>• What is the actual timeline of this campaign?</li> <li>• What is the probability of success?</li> <li>• What are the risks of embarking on this campaign (and what are the risks of not doing so)?</li> </ul>	

<p><b>Go, No Go, or Go Back to Design:</b> Given the above, will the organization go forward with the campaign, do further work to design it, or not move forward with it at this time?</p>	
<p><b>Measurement Considerations:</b></p> <ul style="list-style-type: none"> <li>• What inputs/resources are required to execute this campaign, and what is the resulting (quantifiable) <b>cost</b>?</li> <li>• What <b>funding</b> is available, and what funds need to be raised to enable this campaign to execute?</li> </ul>	

**D. Execute campaign and be adaptive.**

Considerations and Guiding Questions	Organization’s Answers
<p><b>Monitor:</b> What is working? What is not working? How are conditions changing? How, if at all, are opponents engaging? How is the campaign performing against progress measures and targets?</p>	
<p><b>Adapt:</b> What, if anything, should change (e.g., roles, actions)? Is there an opportunity to accelerate the campaign? Alternatively, does a campaign need to be slowed or paused?</p>	
<p><b>Measurement Considerations:</b></p> <ul style="list-style-type: none"> <li>● <b>How is the campaign performing</b> against the plan and its goals? What is on track or off track?</li> <li>● Are <b>actions having a positive impact</b> on building the power necessary to achieve the campaign agenda? If not, <b>what needs to change?</b></li> <li>● Ultimately, <b>did the campaign achieve its agenda?</b></li> </ul>	

## E. Learn, share, and determine next steps.

Considerations and Guiding Questions	Organization's Answers
<p><b>Reflect:</b></p> <ul style="list-style-type: none"> <li>● Did the campaign accomplish its agenda? Why or why not?</li> <li>● What can the organization learn about what was successful and not successful in this campaign to inform future campaign design?</li> <li>● Where was power built or depleted? How can that power be preserved, further strengthened, and deployed in future campaigns?</li> </ul>	
<p><b>Next Steps:</b></p> <ul style="list-style-type: none"> <li>● What comes next? If the campaign was successful, what still has to be done? What new opportunities were created?</li> <li>● How can outcomes of the campaign be shared, and with whom?</li> </ul>	
<p><b>Measurement Considerations:</b></p> <ul style="list-style-type: none"> <li>● Did the campaign succeed in creating the intended value identified at the beginning? <ul style="list-style-type: none"> <li>○ Was a policy changed/protected?</li> <li>○ Was it funded?</li> <li>○ Was it implemented effectively and with fidelity?</li> <li>○ Did it then create the intended value for the intended beneficiaries?</li> </ul> </li> </ul>	

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## About Bellwether

Bellwether is a national nonprofit that works to transform education to ensure young people — especially those furthest from opportunity — achieve outcomes that lead to fulfilling lives and flourishing communities. Founded in 2010, we help mission-driven partners accelerate their impact, inform and influence policy and program design, and bring leaders together to drive change on education's most pressing challenges. For more, visit [bellwether.org](http://bellwether.org).

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