

Working with theory of change in Shared Agenda processes

Maintaining direction, contribution and learning over time

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Guide for working with theory of change in Shared Agendas.
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Contents

1. Framing a theory of change for Shared Agendas	2
2. Shared direction and orientation of change	4
3. System conditions shaping change: facilitators and inhibitors.....	6
4. Portfolios organising action around alternatives	8
5. Coordination and governance	11
6. Monitoring and learning as cross-cutting practice	14

1. Framing a theory of change for Shared Agendas

Actors addressing place-based complex problems often struggle to understand why change advances unevenly over time. Promising initiatives may remain marginal and fail to influence well-established practices, even when they respond to widely recognised social, environmental or economic challenges. Pressure for change may intensify without producing visible shifts, while long periods of apparent stability may be followed by abrupt reconfiguration. These patterns make it difficult for actors to judge where action matters, how local efforts relate to wider dynamics, and what can reasonably be expected from coordination, experimentation and investment over time.

These difficulties are not primarily the result of insufficient commitment, weak design or lack of activity. They are recurrent features of how socio-technical systems evolve. Systems such as food, healthcare, energy, mobility or industrial production tend to remain stabilised around dominant configurations of practices, infrastructures, rules, investments and routines. Over time, these elements reinforce one another, contributing to the persistence of existing ways of organising systems even when social, environmental or economic pressures increase.

At the same time, broader developments alter the conditions under which socio-technical systems operate. Long-term processes such as climate change, demographic ageing, technological change or geopolitical developments expose tensions between dominant configurations and evolving societal demands. In many contexts, alternative practices and initiatives emerge, but remain limited or contested, alongside resistances linked to existing roles, investments and institutional arrangements. As a result, change does not unfold as a coordinated or linear process.

This understanding of change draws on work in transformative innovation policy and socio-technical transitions, which examines how developments at different levels interact over time. From this perspective, system change involves interactions between established practices, emerging alternatives and broader contextual developments. These interactions vary across places and moments, producing uneven trajectories in which learning, experimentation and destabilisation do not automatically translate into wider transformation.

Experience from Shared Agenda processes developed in Catalonia has made these dynamics visible in practice.¹ Across domains such as food systems,

¹ [Articulating Shared Agendas for Sustainability and Social Change](#). Fernández, T., & Romagosa, M. (2020). [Facilitating the Building of Shared Agendas](#). Fernández, T., Royes, A., Essoussi, Ch., Dalmau, F. J., Oliva, C., Echave, C., Gironès, X., & Pallí, A. (2025).

healthcare, industrial transformation and territorial resilience, actors engage with place-based challenges under conditions of fragmented governance, misaligned incentives and distributed responsibility. In these contexts, initiatives often coexist without reinforcing one another, learning remains local, and connections between experimentation, policy, regulation and investment are difficult to sustain over time. These observations have highlighted the limits of project-based approaches and the difficulty of relating place-based action to wider system dynamics.

Within Shared Agenda processes, actors need ways to relate ongoing initiatives to one another, to understand how developments interact across levels and time horizons, and to adjust coordination and expectations as conditions evolve. Without a shared interpretative reference, uneven progress is easily misread as failure or isolated success, weakening collective judgement and learning.

This document addresses this challenge by presenting a way of working with a theory of change as a shared reference in place-based, multi-actor contexts. The theory of change functions as a way of organising interpretation, enabling actors to make explicit how action, coordination and learning are expected to contribute to change over time under conditions of uncertainty and interdependence. It is not used as a fixed plan or a performance framework.

The approach set out in this document is grounded in a multi-level understanding of socio-technical change. This perspective is embedded in how the theory of change is structured and used. The document organises collective interpretation and action around five interconnected elements: the orientation of change being pursued; the system conditions shaping how change unfolds; portfolios of action around emerging alternatives; coordination and governance arrangements; and monitoring and learning processes. Together, these elements provide a way to relate place-based action to wider dynamics while maintaining orientation under conditions of uncertainty.

Sections 2 to 6 develop each of these elements in turn. Together, they provide a coherent framework for working with systemic change in place-based contexts, grounded in Shared Agenda practice and informed by existing literature.² The purpose of the document is not to prescribe solutions, but to support collective interpretation, coordination and learning as actors engage with complex challenges over time.

² [Typology of sociotechnical transition pathways](#). Geels, F. W., & Schot, J. (2007). [Three frames for innovation policy: R&D, systems of innovation and transformative change](#). Schot, J., & Steinmueller, W. E. (2018). [Transformative outcomes: Assessing and reorienting experimentation with transformative innovation policy](#). Ghosh, B., Kivimaa, P., Ramirez, M., Schot, J., & Torrens, J. (2021). [A formative approach to the evaluation of Transformative Innovation Policies](#). Molas-Gallart, J., Boni, A., Giachi, S., & Schot, J. (2021).

2. Shared direction and orientation of change

The first element is the shared direction of change, connecting present action with longer-term change. Agreement on direction does not require convergence around a single vision of the future. A shared direction allows diverse actors to situate their priorities and actions in relation to a common orientation, while retaining autonomy in how they contribute.

Within the theory of change, shared direction expresses an assumption about how the current system should evolve to move in the intended direction. Rather than describing a detailed end state, it points to patterns, practices and resource allocations that need to change.

Learning at this level focuses on whether the shared direction functions as a useful reference for coordination and decision-making, how different actors interpret what “moving in the intended direction” means in practice, and how system developments are understood in relation to that orientation. Interpretation draws on system-level signals of broader dynamics rather than measures of performance. These include signals that point to shifts in dominant practices and resource allocation, and to the emergence of new business models and value chains, without seeking attribution to individual initiatives.

Learning questions

Learning questions at the level of direction support collective interpretation and alignment. They focus on how the shared direction is understood and used in practice, and on how observed developments relate to that orientation. Typical questions include:

- How do different actors interpret the shared direction of change, and where do interpretations converge or diverge?
- Does the shared direction function as a usable reference for coordination and decision-making?
- Where are ambiguities, tensions or disagreements emerging in relation to what “moving in the intended direction” means in practice?
- How do observed system dynamics reinforce, challenge or complicate the shared direction?
- Are new perspectives or forms of knowledge calling for clarification or re-definition of the direction?

These questions support collective interpretation and learning.

Examples of system-level signals related to shared direction

The role of system-level dynamics is to support collective interpretation of whether broader developments appear consistent with the intended orientation of change. They are not linked to the performance of specific initiatives or to predefined targets. Examples of system-level signals of directionality:

- For health and care systems: shifts from hospital-centred responses towards prevention, primary care and support closer to where people live; changes in continuity between health and social care; variation in avoidable hospital admissions or long-term institutionalisation; observable conditions affecting autonomy and quality of life for people with chronic conditions or dependency; recognition of informal and community care in how care is organised.
- For bioeconomy and productive systems: diversification of bio-based products and services; changes in the use of underutilised biological resources; substitution between fossil-based and renewable inputs; emergence of circular or regenerative practices; shifts in investment patterns linked to bio-based or nature-positive activities.
- For environmental conditions affecting wellbeing: changes in air quality in residential, working and care environments; variation in pressures linked to pollution, noise or heat stress; treatment of biodiversity and ecosystems in relation to health and wellbeing.

Open data, satellite-based information and other forms of large-scale data, when interpreted alongside qualitative observation and situated knowledge, support collective sense-making about whether system dynamics appear to align with, diverge from or complicate the shared direction of change.

3. System conditions shaping change: facilitators and inhibitors

Advancing towards the shared direction depends not only on actors' intentions or actions, but also on current system conditions and dynamics that influence how they are able to coordinate, experiment and, over time, expand and sustain emerging practices that differ from dominant arrangements. Attention to these conditions is therefore a core component of Shared Agenda processes and their theories of change.

Facilitators refer to conditions that tend to make collaboration, experimentation or the continuation of alternative practices more viable. Inhibitors refer to conditions that tend to stabilise dominant arrangements or increase the costs, risks or constraints associated with change.

These conditions are not treated as fixed attributes of a system. The same condition may function differently depending on context, actor configuration or moment, and they may change as practices, relationships and external conditions evolve. Within monitoring and learning, attention focuses on how these conditions are evolving over time, how they are experienced by different actors, and how they influence the capacity of the system to move in relation to the shared direction of change. Observations about facilitators and inhibitors feed back into the theory of change, informing how assumptions about contribution, feasibility and leverage are interpreted and revised, where necessary.

For this reason, facilitators and inhibitors are approached as dynamic and relational, and their influence is interpreted through experience rather than assumed in advance. What follows is a list of the most common facilitators and inhibitors identified within Shared Agenda processes.

Typical facilitators

- Trust and quality of relationships: conditions that support information sharing, joint problem-solving and collaboration under uncertainty.
- Shared narratives that legitimise change: ways of framing challenges and directions of change that allow actors to interpret why certain orientations are considered relevant or legitimate.
- Policy and regulatory frameworks: rules and instruments that shape whether coordination, experimentation and adaptation are possible.
- Access to flexible resources and funding: availability of resources that can be adjusted over time to support experimentation and learning.

- Distributed leadership and initiative-taking: patterns of leadership and responsibility that influence whether actors can take initiative beyond formal mandates.
- Spaces and routines for reflection and learning: organised moments for dialogue and interpretation that make learning visible and shared.

Typical inhibitors

- Fragmented governance and unclear responsibilities: overlapping mandates or ambiguous roles that complicate coordination and decision-making.
- Rigid institutional or funding arrangements: rules or incentives that lock actors into established practices.
- Dominant norms, routines or professional cultures: established ways of working that stabilise current practices and marginalise alternatives.
- Power asymmetries and unequal influence: dynamics that marginalise certain perspectives or forms of knowledge.
- Lack of shared data, evidence or transparency: information conditions that hinder shared interpretation.
- Low tolerance for uncertainty or risk: contexts in which experimentation is discouraged and conservative behaviour is reinforced.

Learning questions

Learning questions at this level support collective exploration of why change appears to be occurring, stalling or taking unexpected forms. Typical questions include:

- Which facilitators currently appear to support movement in the intended direction, and which inhibitors appear most influential?
- How are these conditions experienced by different actors, and what does this reveal about roles, power or blind spots?
- Are certain conditions becoming more or less influential over time, and how does this affect collective action?

4. Portfolios organising action around alternatives

In Shared Agendas, portfolios integrate different actions that support the emergence, expansion and adoption of alternatives to dominant practices, aligned with the shared direction of change. These actions may involve developing new practices or business models, connecting initiatives, or addressing conditions that affect whether alternatives can persist, expand or be taken up more broadly over time.

Within a portfolio, what matters is how actions relate to one another and how they interact with existing system conditions, in relation to the shared direction of change. Coherence is defined by how actions are positioned in relation to the dynamics they seek to influence and avoid uniformity or central control. Since causal attribution from individual actions to system change cannot be demonstrated, Shared Agenda processes work with assumptions. These assumptions concern how actions support alternatives; how the emergence of alternatives may challenge established norms or routines; how their expansion may affect the stability or legitimacy of existing arrangements; and how conditions for adoption may influence rules, incentives, infrastructures or patterns of resource allocation that currently favour dominant practices. Making these assumptions explicit allows them to be discussed, questioned and revised as collective work develops.

Action domains

Within Shared Agenda processes, actions are usually organised across some of the following domains:

Building enabling infrastructures. This domain covers arrangements that support collaboration, coordination and learning over time in relation to a shared challenge. This includes facilitation or coordination units linked to specific challenge areas, shared data and knowledge infrastructures, multi-actor experimentation spaces, and organisational forms that allow sustained participation and dialogue.

Establishing frameworks for collective action. This domain covers arrangements that give continuity and institutional footing to collective work. This includes Shared Agendas and governance mechanisms that enable sustained multi-actor collaboration, and their connection to policy instruments, programmes and decision frameworks.

Building infrastructures for monitoring and learning. This domain organises how developments are made visible, interpreted and discussed over time as part of collective work. It includes systems for tracking change beyond individual

projects, indicator sets used across initiatives, and regular spaces for collective sense-making and peer learning across agendas, sectors and levels.

Developing bundles for systemic impact investment. This domain addresses how financial resources are mobilised and related to a shared direction of change over time in ways that support Shared Agenda portfolios rather than isolated interventions. This includes blended or transformative finance arrangements combining grants, loans and equity, intermediary vehicles that pool investment and learning capacities, and funding criteria that value directionality, coherence and learning.

Strengthening knowledge and analytical infrastructures. This domain organises how research and analysis inform collective work over time. It includes observatories and analytical capacities that link scientific evidence to place-based priorities, applied research, system mapping, databases and repositories.

Supporting facilitation, training and capacity building. This domain focuses on the skills required for Shared Agenda processes, particularly for engaging in collaboration under conditions of uncertainty. It includes training for facilitators and policy entrepreneurs, facilitation and systems-thinking skills developed within institutions, and peer-learning networks connecting practitioners across Shared Agendas and regions.

Connecting action spaces. This domain focuses on how initiatives, agendas and policy processes are connected across levels so that learning and coordination extend beyond place-based processes, contributing to system change at broader scales. It includes mapping and linking action spaces across sectors and governance levels, as well as exchanges and coordination mechanisms.

Monitoring and learning focus on how actions oriented towards alternatives relate to one another, how they engage with system conditions, and how their assumed contribution to systemic change is interpreted over time in relation to the shared direction of change.

Learning questions

Learning questions at this level focus on the plausibility of contribution assumptions and on how the portfolio engages with system dynamics. Typical questions include:

- How are current actions interpreted in relation to the shared direction of change?
- Which system conditions appear most relevant for these actions, and how are facilitators and inhibitors shaping what is possible?

- What do observed developments suggest about whether alternatives are gaining viability, stability or recognition over time?
- Are there gaps or imbalances across developing, expanding and supporting adoption of alternatives that limit overall contribution?
- How do current patterns of resource mobilisation or allocation support or constrain these dynamics?
- Which assumptions about contribution need clarification, adjustment or reconsideration in light of experience?

These questions support collective interpretation of portfolio-level contribution rather than assessment of individual initiatives in isolation.

Examples of observable signals of portfolio-level change

Signals related to this element support collective interpretation of how actions contribute to the emergence, expansion and adoption of alternatives in relation to dominant systems, and how these dynamics evolve. Examples include:

- Developing and nurturing alternatives: emergence of practices or models distinct from dominant ones; changes in recognition, legitimacy or visibility; development of capabilities, knowledge or networks.
- Expanding and stabilising alternatives: diffusion beyond initial contexts; increased stability of organisational, economic or institutional arrangements; connections to existing value chains, services or infrastructures.
- Supporting adoption by dominant arrangements: changes in rules, standards or incentives; shifts in investment or procurement patterns; uptake of alternative practices by mainstream actors.
- Allocation of resources across the portfolio: observable shifts in how financial or other kind of resources are directed towards developing, expanding or adopting alternatives, relative to established practices.

These signals are interpreted in relation to the shared direction of change and the identified facilitators and inhibitors. They support judgement about whether action oriented towards alternatives remains plausibly connected to systemic change, and where assumptions require revision.

5. Coordination and governance

Coordination and governance address how collective action is organised and revisited so that it can be sustained over time. In Shared Agenda processes, governance is understood as part of how action is organised in practice, rather than as a layer added on top of initiatives or portfolios.

Within the theory of change, governance arrangements express shared assumptions about how alignment, coordination and decision-making are expected to function under conditions of uncertainty, plurality of actors and long time horizons. These assumptions are about how priorities are discussed, how tensions and trade-offs are handled, how responsibilities are distributed, and how decisions are revisited over time. Governance is therefore examined in terms of how it shapes the organisation of collective action in relation to the shared direction of change.

Coordination and governance are particularly salient in relation to portfolios of initiatives. While complementarities between actions may be anticipated, their emergence and persistence cannot be assumed. Governance arrangements shape the spaces, routines and roles through which interactions between initiatives are recognised, interpreted and addressed, including how overlaps, tensions or misalignments are surfaced and discussed. They also influence how priorities are set across the portfolio and how limited resources are allocated, reallocated or withheld in response to learning and changing conditions.

From a monitoring and learning perspective, attention focuses on how governance functions in practice rather than on formal structures. Interpretation draws on signals of coordination and governance, understood as signals of how decision-making, alignment and responsibility distribution operate in practice. These include how coordination routines are used, how disagreements are handled, how decisions are justified and revisited, and how learning influences prioritisation and resource allocation over time. Observation and reflection on these signals inform how assumptions about coordination, alignment and decision-making are interpreted and revised as conditions and actor configurations evolve.

Learning questions

Learning questions at this level support collective interpretation of how governance arrangements are shaping collective action. Typical questions include:

- How are current governance arrangements shaping alignment around the shared direction of change?

- How are complementarities, tensions or overlaps between initiatives being recognised and addressed in practice?
- Who participates in coordination and decision-making, and which perspectives or forms of knowledge are less visible?
- How are decisions made and revisited over time, particularly in response to learning or changing conditions?
- How are disagreements and trade-offs handled, and what effects does this have on coordination and learning?
- How are priorities and resource allocation decisions discussed, contested or adjusted in light of experience?

These questions support interpretation of governance in practice rather than assessment against predefined models.

Examples of governance-related learning signals

The elements listed below support collective learning about how coordination and governance operate in practice over time. They function as observable signals that help participants interpret whether governance arrangements are enabling coordination, learning, and adaptive action in relation to the shared direction of change.

These signals are typically surfaced through qualitative observation, collective reflection, documentation of processes, and the experience of participating actors. They support sense-making about how governance shapes action across the portfolio and how it evolves in response to learning and changing conditions. Examples of governance-related learning signals include:

- The regularity of spaces for coordination, dialogue, and joint decision-making, and how useful these spaces are perceived to be by participating actors.
- The degree of shared understanding of roles and responsibilities among actors involved in governance arrangements.
- The range and diversity of actors actively participating in governance processes, and how this changes over time.
- The capacity of governance spaces to surface, hold, and discuss tensions, contradictions, or trade-offs within the portfolio.
- Instances where decisions are revisited, revised, or adjusted in response to learning, reflection, or emerging evidence.

- Perceptions of legitimacy and trust associated with governance arrangements among different groups of actors.
- Situations in which priorities or resource allocation decisions are adjusted in response to learning or evolving system conditions.

These signals are interpreted in relation to the shared direction of change and the functioning of the portfolio. Their role is to support collective interpretation of whether governance arrangements are enabling coherent action, sustaining learning, and maintaining adaptive capacity over time, rather than to judge success or failure.

6. Monitoring and learning as cross-cutting practice

In Shared Agenda processes, monitoring, learning and evaluation are embedded in collective work as it unfolds. Because contribution to systemic change cannot be established through direct causal attribution, learning focuses on interpreting signals from practice and understanding how direction, system conditions, portfolios of actions and governance arrangements interact over time.

In practice, monitoring and learning operate through routines, practices and shared references that make developments visible in relation to the shared direction of change. They enable collective interpretation of patterns of action, interaction and system change, bringing tensions and emerging dynamics into view. Monitoring provides visibility on what is being done, how resources are mobilised and how collective effort is distributed across public, private and civic domains, supporting informed dialogue and coordination.

Learning is integral to this process. Structured moments of reflection grounded in practice create space to examine assumptions, compare approaches and adjust relationships between initiatives as conditions change. Learning remains closely connected to coordination and governance, allowing collective work to adapt without separating reflection from action.

Both quantitative and qualitative information contribute to learning. A first level relates to activities and outputs — such as initiatives launched, actors involved, resources mobilised and infrastructures created — providing visibility and supporting accountability within the collective process. A second level focuses on developments that signal changes in how practices are organised and coordinated, including how alternative practices interact, spread across contexts or engage with institutional, regulatory and organisational arrangements. A third level concerns system-level developments in relevant domains, interpreted in relation to the shared direction of change and wider system dynamics, without seeking direct attribution.

Interpreting these signals requires different forms of evaluation. Monitoring documents activities, participation and resource mobilisation, providing a shared factual basis for interpretation. Formative evaluation supports learning during action by helping actors interpret emerging signals, examine assumptions and adjust how collective work is organised as conditions evolve. Periodic contribution-oriented evaluation examines how portfolios of actions relate to the shared direction and to wider system dynamics, focusing on the plausibility of contribution rather than attribution.

Through these practices, direction, system conditions, portfolios and governance arrangements are interpreted in relation to one another, informing coordination, prioritisation and adjustment over time.

Learning questions

Learning questions at this level focus on how monitoring, learning and evaluation function in practice and how they connect the different elements of the framework. Typical questions include:

- Which signals from practice are actors attending to in relation to shared direction, system conditions, portfolios of actions and governance?
- How are assumptions about contribution, feasibility and leverage being discussed, questioned or revised over time?
- What patterns, tensions or unintended effects are becoming visible through learning?
- To what extent do learning practices allow for multiple interpretations and perspectives to be expressed?
- How are insights from monitoring, learning and evaluation taken up in decisions about coordination, priorities, policy choices or investment?
- Where do monitoring and learning practices risk becoming routine, disconnected from practice or overly procedural?

These questions support reflection on whether monitoring, learning and evaluation function as integrative practices, rather than as reporting or compliance exercises.

Examples of monitoring, learning and evaluation signals

The elements listed below support collective interpretation of how monitoring, learning and evaluation practices operate in practice, and how they connect different elements of the framework to inform collective action over time. They are not performance indicators or evaluation criteria. Rather, they function as observable signals that help participants make sense of whether learning processes are active, connected and meaningful in relation to the shared direction of change.

These signals are typically surfaced through qualitative observation, collective reflection, documentation of processes and the experience of participating actors. Their role is to support learning across initiatives and over time, rather than to assess the effectiveness of individual actions.

Examples of monitoring, learning and evaluation signals include:

- The presence and regularity of shared spaces dedicated to collective reflection and interpretation.
- Explicit reference to learning questions or signals in coordination, governance or decision-making discussions.
- Instances where assumptions, priorities or actions are revisited in response to learning.
- The range and diversity of actors actively contributing to learning processes and shared interpretations.
- Clarity about how learning insights are connected to adjustments in practice, coordination or resource allocation.
- Continuity of monitoring and learning practices over time, despite changes in actors, initiatives or contextual conditions.

The information generated through these signals supports collective judgement about whether action remains connected to the shared direction of change. It also helps identify where assumptions require revision as learning develops and conditions evolve, reinforcing the adaptive capacity of the overall framework.