

Suggested Guidelines for Creating a Theory of Change

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These guidelines were created by Martha Farmelo, consultant in institutional strengthening of NGOs, with suggestions from the Hewlett Foundation's program officers for Mexico. They draw from and seek to simplify and condense several other useful but longer guidelines listed in the bibliography. The Hewlett Foundation in no way requires use of these guidelines, but hopes they may be helpful for organizations working on Theory of Change.

These guidelines are a work in progress. Feedback and suggestions are welcome and needed. Feel free to write to your program officer or directly to martha.farmelo@gmail.com.

Index

I.	What is a Theory of Change?	3
II.	Why Have a Theory of Change?	3
III.	What Is the Difference Between a Theory of Change and a Strategic Plan?	4
IV.	Keeping it Simple: Some General Tips on Format and Terminology	5
V.	Creating a Theory of Change for a Project	5
VI.	Creating a Theory of Change for Your Organization	9
VII.	Sample Structure of a Theory of Change	13
VIII.	Some Basic Terminology	13
IX.	Bibliography	14
X.	Suggested Additional Reading	15
XI.	Acknowledgements	15

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I.

What is a Theory of Change?

The term “theory of change” is used widely and can mean different things to different people. Theories of change can have different characteristics, terminology or levels of sophistication.

However, most would agree that a theory of change is a summary of the hypotheses that explain how and why the things you do will lead to the change that you seek to generate, that is, why what you do will work. A theory of change allows you to detect 1) what went right when a project or organization achieves its expected outcomes and what wrong when that does not occur and 2) how to adjust along the way. It is a living document that can be adjusted as learning takes place about what works and doesn't work.

A theory of change can be developed for a project, an organization or an initiative involving multiple organizations. These brief guidelines are aimed at making the concept and process more accessible and applicable to different groups' needs and contexts, focusing on project and organizational theories of change. Naturally, there should be a clear relationship between the two. An organizational theory of change mirrors that of a project in spirit, but is broader in scope, as it has to do with the organization's *raison d'être* and should encompass all its various initiatives. Creating an organizational theory of change requires thinking beyond each distinct project and reflection on what the organization as a whole seeks to accomplish.

For those who have never worked with theory of change before, it is probably a good idea to start with a theory of change for one project, not all your projects. It is also important to develop the theory of change for your organization, if you don't already have one.

II.

Why Have a Theory of Change?

Because it increases projects' and organizations' chances of success by making them more strategic. How does it do this?

- By making you think in detail about whether what you propose to do is necessary, sufficient and the best possible strategy to achieve the outcomes you say you will achieve.
- By helping you identify any additional strategies, activities, or alliances necessary for success, or if there is anything you are planning to do that you should do differently.
- By shifting thinking from what you are doing currently to what you want to achieve, and starting from there.
- By prompting you to articulate all of the relevant assumptions about how change happens so you can test them along the way.

Because if your project doesn't turn out as planned, your theory of change should allow you to pinpoint why and correct those problems. How does it do this?

- If a project doesn't achieve its outcomes, you should be able to identify the assumption(s) that didn't hold and adjust the project accordingly.
- Developing a theory of change makes strategic thinking and analysis that have been implicit more explicit and organized. And in many cases, the process will provoke new strategic thinking, as in "Ah! We hadn't thought of that."

A good theory of change will help you make the best decisions about your activities, be they planned or spontaneous. You'll also be able to show others that it is realistic to expect you'll reach your outcomes with the time and resources you have available.¹ It is almost impossible to determine whether progress has occurred if you have not explicitly identified the steps to progress.² A theory of change can also bring everyone in the organization onto the same page by having them make explicit and generate consensus around the basic assumptions that guide their work.

In sum, if your theory of change is strong and complete, you have the best chance of making the change in the world you set out to make and of demonstrating your achievements and your lessons along the way.³

III.

What Is the Difference Between a Theory of Change and a Strategic Plan?

A theory of change is a set of hypotheses that explain how you believe that the change you want to make can come about, including the causal links and assumptions between early, intermediate and long term outcomes for either a project or an organization.

A strategic plan is a summary of your organization's mission, vision, expected outcomes, strategies and basic activities, and how these relate to each other.

Generally speaking, a strategic plan flows from, is based on and even justified by a group's organizational-level theory of change. However, sometimes a strategic planning process helps generate insight for elaborating an organizational or project-level theory of change.

1 *Ask the Expert: An Introduction to Theory of Change*, an article from the Evaluation Exchange, by Andrea Anderson of the Aspen Institute Roundtable on Community Change, published by the Harvard Family Research Project, Volume XI, Number 2, Summer 2005. Available on-line at <http://www.hfrp.org/evaluation/the-evaluation-exchange/issue-archive/evaluation-methodology/an-introduction-to-theory-of-change>.

2 *Theory of Change: A Practical Tool for Action, Results and Learning*, prepared by Organizational Research Services for the Annie E. Casey Foundation. 2004, p.39.

3 [Theoryofchange.org](http://theoryofchange.org).

IV.

Keeping it Simple: Some General Tips on Format and Terminology

Theories of Change come in many shapes and sizes. There is no right or wrong way to do a theory of change. The important thing is to make explicit how your organization believes that change will occur.⁴

The specific format you choose is not important. In principle, text is fine, though charts can sometimes be very useful. As a rule, a chart alone is unlikely to give a complete picture of your theory of change.

The format for charts can vary. Some groups choose to put the final outcome at the top, others at the bottom. Some have one layer of preconditions, others use more than one. Some have arrows that point between various preconditions, others not. The important thing is that the chart be complete, clear, and understandable to an outside reader.⁵

Don't get bogged down by terminology. Different guidelines suggest different terms. We try to keep it simple using the terminology included in the glossary below. If you prefer other terminology, that is fine. **The important thing is to be clear and consistent internally.**

V.

Creating a Theory of Change for a Project

These are the questions a project-level Theory of Change should answer:

1. Long Term Outcome

What is the final outcome or change that you expect to achieve with this project?

What is the key problem you have identified and the long-term change you are working toward? This outcome should be expressed as a noun, not a verb, and should directly respond to your problem. Many groups discover that they do not have clear internal consensus about this. So one way to get at this is to ask: what is the long-term problem you are trying to address and who does it affect? A basic theory of change will look at your long-term outcomes in three to five years. A more detailed theory of change might look even further into the future: Thinking ten years down the road, what are some examples of how things would have changed as a result of this project?

Example: In ten years, a significant reduction in hunger in Mexico by securing sufficient in-country production of eight basic foodstuffs currently missing from the basic basket of low-cost food items of high nutritional value. (Note: this and the following examples are entirely fictitious, created only to demonstrate the different components of a theory of change.)

⁴ *Theory of Change: A Practical Tool for Action, Results and Learning*, prepared by Organizational Research Services for the Annie E. Casey Foundation. 2004, p.2.

⁵ See, for example, the theory of change for "Project Superwoman" on pages 31-33 of *The Community Builder's Approach to Theory of Change, A Practical Guide to Theory Development*, by Andrea A. Anderson, PhD, ActKnowledge and the Aspen Institute Roundtable on Comprehensive Community Initiatives, 2005. Available on-line at http://www.dochas.ie/Shared/Files/4/TOC_fac_guide.pdf.

2. Necessary Preconditions

What are all the early and intermediate outcomes that are preconditions for reaching your final outcome? Why are they both necessary and sufficient?

One way to identify these is to ask: Why hasn't the desired change happened yet? What have been some of the barriers or obstacles to progress that need to be tackled? These should go beyond the outcomes or preconditions⁶ you will work on to identify what other changes need to happen, how will they happen and who will make them happen. Otherwise, you can do a great job at carrying out your project and still not achieve your final outcome. A more detailed theory of change will be quite specific: for example, to change a policy, which policy makers need to take action?

Examples:

- *A national program of agricultural loans and technical assistance for the effective use of seeds to produce the eight food items mentioned above.*
- *Timely importation of the seeds.*
- *Citizen-led pressure to make this a priority on the national agenda.*
- *Participation of hunger-related Mexican organizations in campaigns to promote these programs.*
- *Appropriation of the issue by rural producer associations so that they apply political pressure to make this a priority in the national agenda. Willingness by rural producers to take the risk of beginning to use these seeds.*
- *Clear messages from rural producer associations regarding the low risk and economic return associated with using these seeds.*
- *Resolution of the land tenure status of medium-sized producers in two of the states to ensure their eligibility for the national credit program.*

3. Project Outcomes

What are the precise early and intermediate outcomes that your project will produce?

In other words, of all the preconditions identified above, which one(s) will you work on? Remember to use nouns, not verbs. Exactly what will have changed at the end of your project? Who are the beneficiaries of this project? Note that preconditions might have different layers. For example, one precondition is the existence of compelling research to influence legislators so that they pass a law so that organizations can bring strategic litigation so that government officials are forced to begin proper implementation of the law.

For questions 2 and 3, you may want to specify stages: which preconditions will be created in years 1 and 2, which might come later or take longer, etc.

Example: We are going to carry out advocacy toward the creation of a national program of agricultural loans and technical assistance for the effective use of the eight seeds in question. The expected project result is: in three years, the creation and implementation of an effective loan program for producers in three states with an assigned budget of at least 3.6 million pesos.

4. Indicators of Project Success

How will you know when you've achieved your project's outcome(s)?

⁶ Early and intermediate outcomes are often preconditions for outcomes down the road. As such, the terms "outcomes" and "preconditions" are used interchangeably.

What does success look like? What specific information will you use to show success? What threshold will you establish?

Example: Program created and advertised in three states. Budget allocated. 70% of loans disbursed.

5. Assumptions on the Link between Your Project and Your Long Term Outcome

What assumptions explain the connections between your project's early, intermediate and long term outcomes? What research supports these assumptions?

What are the assumptions that you've made regarding the link between each of your project's preconditions or intermediate outcomes and the long term outcome it leads to? One way to get at this is to ask: What are the causes of the problem you identified above? (financial, political, technical, cultural, of scale?) What interest and demand exists for the work you will do? What are the assumptions you've made about the viability of your outcomes? If your work involves your ability to change attitudes and behaviors, what assumptions underlay your belief that you will be successful? For example, early outcomes may include alliances. Do your allies share your interests? How will you get them to do what you need them to do?

Examples:

- *Research shows that one of the most important obstacles to Mexican production of foodstuffs necessary to reduce hunger is the lack of seeds for eight basic items.*
- *There are two main reasons for the lack of seeds: they must be imported, and producers need credit to purchase them.*
- *The import permit was granted a few months ago, and now must be used.*
- *We assume that if there is credit available and it is well-advertised, producers will purchase and use the seeds.*
- *We assume that if some of the large and medium-sized agricultural firms invest in these seeds, other producers of various sizes will follow their example.*
- *We assume that the government will provide an effective technical assistance program. We are working toward this goal in another related project.*
- *Research shows that the seeds are adequate for use in northeast Mexico. This still needs to be tested in other regions.*
- *We assume there will be demand and a market for the foodstuffs grown with these seeds.*

6. Activities

What basic activities will you undertake to achieve the project's outcome?

This should be a general summary of your activities, not a detailed work plan. When you are done outlining your activities, the next question will help you ensure that all the causal links between activities and outcomes are clear and complete.

Examples:

- *Dissemination campaign in national media outlets on the need for the credit program. (Consult with communications experts for assistance with design of this campaign.)*
- *Meetings with public officials in technical positions to discuss the program's design.*
- *Meetings with the producers associations in the three states.*

7. Assumptions on the Link between Activities and Outcomes

What assumptions and expectations explain how the proposed activities will lead to your project outcome(s)?

Again, assumptions should be reasonable and based on some degree of evidence. These should make it clear why this set of activities is better than any other set of activities. One way to get at this is to ask: What leads me to believe that I am addressing the root causes of the problem I addressed above? Are the planned activities sufficient to reach the project outcome?

Examples:

- *The four key technical experts at the national level and in two of the three states (who already know us, consult with us and meet with us) will remain in their positions.*
- *The producers associations will continue to work with us.*
- *The dissemination campaign will have solid results in state-level and national print media and radio.*
- *Also, we will succeed in hiring, integrating and adequately supervising a qualified person to lead the campaign within our organization, as this is a new activity for us.*

8. Other Outcomes

How will the other early and intermediate outcomes that you are not working on come about?

Who will make them happen and how will they do so?

Examples:

- *The “Zero Hunger in Mexico” coalition will raise this issue in its campaigns over the next three years.*
- *Producers’ organizations will succeed in getting titles for at least 50 percent of the lands currently in dispute in two of the three states.*

9. Benchmarks along the Way

What are the changes you should be able to see early on and throughout the process to know well before you get to the end whether or not the project is being successful?

How will you know that you are on your way?

Examples:

- *Public officials will discuss the credit program design with us.*
- *Producers associations will fulfill their promise regarding the dissemination of the program among producers and also raise the visibility of the issue in national-level media.*
- *The media will consult us at least three times a year on this issue.*

What factors will tell you that things are not going as planned?

What will you do to monitor these and use that information along the way?

Your assumptions should have helped you identify the things that you most expect could prevent this project from reaching its final outcome. What is the probability that they might occur? This is also known as a “pre-mortem:” instead of asking at the end what went wrong, here we ask in advance what could go wrong. This

allows you to plan ahead and mitigate some of these risks, perhaps incorporating activities and even questioning some of your key assumptions.

Examples:

- *The credit program is not created and there is a lack of political will to do so (currently this seems unlikely).*
- *The program is created but no budget is allocated (this could depend on the evolution of the political situation of the National Agricultural Bank, given the scandal that led to the resignation of the Bank's president last year).*
- *Producers associations fail to participate in the dissemination campaign (they have demonstrated interest in participating in the campaign in private conversation and public events, but this needs to be verified).*

10. The Right Project for Your Organization

How specifically does this project relate to the mission of your organization?

Examples: This project seeks to modify one of the most important preconditions for achieving our mission, which is to reduce hunger in Mexico. This precondition was identified and prioritized in our organizational theory of change and is one of our four expected organizational results for the next three years.

Summarize Forward

After you've gone through the steps above you should be able to summarize your project's theory of change very briefly: We are going to do X [activities] in order to achieve Y [the outcomes of those activities] which will contribute to Z [your long term outcome].

At the same time, a more detailed theory of change could include a longer and more complex "so that" chain or chains for each strategy you will undertake: We are going to do A in order to achieve B so that C occurs so that D occurs so that E occurs which will contribute to Z [your long term outcome].

Keep in mind another key question that funders and others will likely ask: Is this theory of change plausible, doable and testable?⁷

VI.

Creating a Theory of Change for Your Organization

1. Organizational Vision

What is the change that your organization wants to see in the world?

This may be rather broad and perhaps ambitious but it must be clearly defined. This is the change you'd expect to see in 10, 20 or 30 years. Presumably this change will be the result of the effort of a number of organizations and actors, not just your organization acting alone.

Example: reduce hunger in Mexico.

⁷ *The Community Builder's Approach to Theory of Change, A Practical Guide to Theory Development*, by Andrea A. Anderson, PhD, ActKnowledge and the Aspen Institute Roundtable on Comprehensive Community Initiatives, 2005, p.25.

2. Necessary Preconditions

What are all of the things that need to change in order for this outcome to be met?

These changes are also sometimes referred to as early and intermediary outcomes. One way to identify these is to ask: Why hasn't the desired change happened yet? What have been some of the barriers or obstacles to progress that need to be tackled? These should go beyond the outcomes or preconditions you will work on to identify what other changes need to happen, how will they happen and who will make them happen. Otherwise you can do a great job at achieving your organizational mission and still not see the change you want to see in the world.

Example (to simplify): Both increased production of foodstuffs and improved channels of food distribution in rural and urban areas are required. To improve production, several things are needed: improved government programs of technical support and credit for producers, and a wider variety of seeds for national production of foodstuffs. To improve distribution channels, there must be road improvements (public works) and a way to control the roadblocks that occur with frequency in certain areas of the country. (Many more preconditions could be specified).

3. Organizational Niche

What is unique about your organization that distinguishes it from others working in the same field?

What is your unique and special contribution to the long-term outcome that no other organization is contributing? What are the specific preconditions you will work on?

If there are other organizations doing the same work, what makes your work significantly different? What organizations or other actors are creating the other necessary preconditions?

Given that you are just one organization, how will you limit and focus your work? What are the criteria for doing so? (What have you decided not to do?)

Example: We focus on resolving the problem of the quality and variety of seeds needed for producing foodstuffs, and that of the credit and technical assistance programs for producers. We do this because we have the necessary technical skills and because no one else is doing it. There are research centers that have detected which seeds could be used and imported, but they are mostly academic centers and they neither work with producers nor conduct policy advocacy. Other groups are working on other aspects of food production, and the President has made what we believe to be credible campaign promises regarding distribution channels.

4. Outcomes

What are your principal organizational outcomes?

These should be expressed as nouns. Ideally, there should be no more than three to five organizational outcomes. The general timeframe could be five to ten years. As you go further out in time, your theory of change has the potential to be more complex and possibly more robust.

Example: in five years, provision of 50 percent of the seeds needed in the country and acceptance by small, medium and large-scale producers. An effective government loan and technical assistance program that reaches 40 percent of producers. In ten years, provision of 100 percent of the seeds with the same acceptance by producers and 80 percent of producers reached by the government's effective credit and technical assistance program.

In the first three years we will have achieved:

- *Import licenses for the eight missing seed types.*
- *Use of the seeds by 25 percent of producers in four key states.*
- *Reproduction of the seeds for continued use by the producers involved.*
- *The creation of a loan program for producers in three states with a minimum budget of 3.6 million pesos.*

5. Indicators of Success

How will you know when you've achieved your organizational outcomes?

What does success look like? What specific information will you use to show success?

Example: in three years, bi-monthly reports from the National Institute of Agricultural Technology on seed use in the identified states, as well as reports by the National Agriculture Bank on the credit program.

6. Assumptions on the Link between Organizational Outcomes and Long Term Change

What assumptions have you made between your organizational outcomes and the change you want to see down the road?

What are the assumptions that you've made regarding the link between each of your organizational outcomes and those it leads to, including your ultimate outcome? What are the assumptions you've made about the viability of your outcomes? If your work involves your ability to change attitudes and behaviors, what assumptions underlay your belief that you will be successful? For example, early outcomes may include alliances. Do your allies share your interests? How will you get them to do what you need them to do?

Some assumptions and preconditions may not be under the control of the organization. It is still critical to make them explicit, be aware of them, and eventually devise strategies to address them.

Examples (many more could be identified):

- *Mexican producers will accept the imported seeds.*
- *The imported seeds will prosper in Mexico and provide sufficient production levels.*
- *The President will fulfill his campaign promises regarding distribution channels.*

7. Strategies and Activities

What are the strategies and main types of activities you will use to achieve your organizational outcomes?

Strategies could include things like strategic litigation, research, or evidence-based policy advocacy. Activities are how you will carry these out. When you are done outlining your strategies and activities, the next question will help you ensure that all the causal links between activities and outcomes are clear and complete.

Examples:

- *Request import permits and implement importation of seeds.*
- *Work with producers associations to promote the incorporation of new seeds in their training and technical services.*

- *Work with promoters from the National Institute of Agricultural Technology.*
- *Conduct a dissemination campaign on the new seeds in specialized media outlets.*
- *Advocacy and education with lawmakers on the credit program and with National Agriculture Bank technicians on the program design.*
- *Alliances with other groups that work on agricultural credit.*

8. Assumptions on the Link between Strategies/Main Activities and Organizational Outcomes

What assumptions explain the link between your strategies and main activities and your organizational outcomes? What makes you believe that your approach (defined by the strategies you choose) is better than others to solve the problem and achieve your outcomes?

Again, assumptions should be reasonable and based on some degree of evidence. These should make it clear why this set of activities is better than any other set of activities. Are the planned activities sufficient to reach your project outcome? What interest and demand is there for the work that you do? What is the evidence that demonstrates this demand and interest?

You might also want to analyze if the areas or teams of your organization are still relevant. What are the assumptions that underlay the existence of those areas? Are those assumptions still true?

Examples:

- *Producers associations have expressed interest in working with us. In fact, it was their idea to import the seeds.*
- *These associations offer high quality trainings and technical services. We have partial information on this: in some states, yes, while in others we are less sure. This is something we are continuing to look into.*
- *We assume the same regarding the services provided by the National Institute of Agricultural Technology and that the Institute will not suffer budget cuts as almost occurred last year.*
- *We have decided to discontinue our research program on seeds because the academic centers are doing adequate work in this regard. However, we don't have a communications area with specialists, which we need for the dissemination campaigns, a new activity for our organization.*

9. Benchmarks along the Way

What are the things you should be able to see early on and throughout the process to know well before you get to the end whether or not your organization is being successful?

How will you know that you are on your way?

What factors will tell you that things are not going as planned?

What will do you to monitor these and use that information along the way?

VII.

Sample Structure of a Theory of Change

There are many different ways to represent a theory of change visually, including flow charts, pyramids, and other formats. Here is a very simplified example to give you an idea of the levels and links involved. In general, the simpler and easier to read and follow, the better.

Basic Elements of an Organizational Theory of Change



VIII.

Some Basic Terminology

Again, you can use any terminology, but here we provide some definitions for the key terms used in this guide.

Theory of change. A summary of the hypotheses that explain how and why the things you do will lead to the change that you seek to generate, that is, why what you do will work. It includes causal links and assumptions between early, intermediate and long term outcomes for either a project or an organization.

Strategic plan. A summary of your organization's mission, vision, expected outcomes, strategies and basic activities, and how these relate to each other.

Outcome. The result you are working towards or the change you want to see in the world.

Precondition. The things that need to happen or be present in order to reach the desired outcomes. Also referred to as early and intermediate outcomes, since these are often preconditions for outcomes down the road.

Strategy. A method for obtaining a desired outcome. In this guide, by "strategy" we mean, for example, litigation, advocacy, communications, research, coalition-building, etc.

Activity. An action undertaken (for example, a meeting, a publication, a campaign) to carry out the strategy for reaching the desired outcome.

Benchmark. Pre-identified changes or events throughout the project (or throughout the organization's lifespan) that will indicate whether the project or organization is making progress toward reaching its desired outcomes. These are reference points along the way.

Indicator of success. Qualitative and quantitative information used to demonstrate achievement of the desired outcomes.

Pre-mortem. Identification up front of factors that 1) will indicate that things are not going as planned and 2) could prevent the project or organization from reaching its desired outcomes. It allows you to ask in advance what could go wrong.

Niche. The unique and special contribution that an organization makes toward a long-term outcome and that no other group is making.

IX.

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X.

Suggested Additional Reading

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XI.

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