

Mapping the Movement: Methods and Tools for Ecosystem Intelligence

The practitioner's handbook: from defining your ecosystem boundary to producing a synthesis the field can act on

Executive Summary

Understanding a movement ecosystem is a craft with methods. This guide is the practitioner's handbook for that craft: nine steps that take you from a vague sense of "the field" to a structured, validated, decision-ready picture of the ecosystem you work within — who the actors are and what they do, how they are connected, where power sits, where the resources flow, what narratives are winning, what the opposition is building, and what the people doing the work are actually experiencing.

Two principles run through every method in this guide. First, **triangulate**: no single method sees the whole ecosystem. Actor inventories miss relationships; network maps miss resources; funding data misses grassroots energy; surveys miss what respondents will not write down. Combining even two or three methods produces a materially more accurate picture than any single one. Second, **map with the field, not on it**: participatory approaches — where field members contribute to, review, and receive the map — produce more accurate pictures and far higher adoption than extractive research done to a field from outside. The moment mapping starts to feel like something done to the movement rather than for it, both accuracy and legitimacy collapse.

This guide assumes the conceptual foundations of Guide 1 (what movement intelligence is, the seven ecosystem components, the ethics that bound the practice). Guide 3 addresses what comes after the map: using intelligence for positioning and coordination, building shared intelligence infrastructure across a field, and the data governance and security stewardship that keep the whole practice safe and legitimate.

Evidence Table

Key Finding	Strength	Implications for Movement Organizations
Network position matters: actors who bridge otherwise disconnected clusters ("weak ties," "structural holes") enjoy disproportionate access to information and opportunities for coordination.	High (social network analysis research)	Map relationships, not just actors. Bridges, brokers, and isolates are strategic facts about a field.
Field scans that combine surveys, interviews, and secondary data produce materially different — and more accurate — pictures than any single method alone.	Moderate (evaluation and field scan practice)	Triangulation is a design requirement, not a luxury. Budget for at least two independent methods per priority question.

Key Finding	Strength	Implications for Movement Organizations
Public funding data (tax filings, grants databases, annual reports) reliably reveals resource concentration and structural gaps that are invisible to individual actors.	High (philanthropic data infrastructure)	Resource-flow analysis is feasible for any field with public data and modest analyst time.
Systematic protest and mobilization event data enables movements to measure participation trends over time rather than guessing from atmosphere.	High (protest event analysis; crowd-counting research)	Mobilization is measurable. Fields can track their own participation with public datasets and simple internal counts.
Tracking frames — how an issue is argued — predicts issue trajectory better than tracking raw media volume.	Moderate (framing and strategic communications research)	Narrative intelligence should inventory and monitor frames, ours and the opposition's, not just count mentions.
Participatory mapping, in which field members co-produce and receive the analysis, improves both data quality and adoption of findings.	Moderate (participatory research practice)	Design every field-facing method with a feedback loop: contributors see results first and benefit visibly.

Step-by-Step Framework

Step 1: Define the Boundary and the Questions

Every mapping failure begins with an unbounded scope. Before collecting anything, complete an **Ecosystem Boundary Canvas**: the issue scope (what is inside and outside "our movement"), the geographic scope, the actor types you will include (do funders count? media? adjacent movements?), and the time horizon. Then write your **priority intelligence questions** — five to seven field-level questions, each traceable to a real decision your organization or coalition will make. "What does the field look like?" is not a question; "which capabilities does our field lack that our three-year strategy assumes exist?" is. The questions determine which of the following methods you need; almost no organization needs all of them at once.

Step 2: Build the Actor Map

The actor map is the foundation layer: a structured inventory of the organizations and formations in your ecosystem. Sources for building it include coalition rosters and network memberships, grants databases and funder portfolios, conference programs and sign-on letters, media coverage, and snowball referral ("who else should we be looking at?" asked at the end of every conversation — the single highest-yield source for finding grassroots and informal actors that directories miss).

For each actor, the **Actor Mapping Matrix** captures: name | type (NGO, grassroots group, coalition, funder, research organization, service provider) | primary theory of change | main strategies and programs | geography and constituency | approximate scale (staff, budget band) | key relationships | notes and confidence level. Resist the urge to capture more fields; a matrix everyone maintains beats a database no one updates. Classify actors along two lenses from Guide 1 — theory of change and ecosystem role — because the strategic payoff comes from seeing crowded and empty lanes, not from the inventory itself.

Step 3: Map Relationships and Network Structure

An actor list tells you who exists; a network map tells you how the field actually works. You do not need specialized software to start. A **relational survey** of even fifteen to forty field actors — asking each to name the five organizations they collaborate with most, the five they share information with, and the five they would call in a crisis — yields a workable network picture in a spreadsheet. Dedicated tools (Kumu, Gephi, Polinode) add visualization and metrics when you are ready.

Read the resulting structure for four things:

- **Clusters** — sub-communities that talk mostly to themselves (often organized by strategy, ideology, geography, or identity), which mark the field's internal fault lines and translation needs
- **Bridges and brokers** — the actors connecting clusters; the field's coordination capacity runs through them, and their loss is a field-level risk
- **Isolates** — actors doing relevant work with few connections, frequently grassroots groups whose knowledge the field is failing to receive
- **Over-centralization** — a field that routes everything through one hub is fast in good times and fragile in bad ones

Step 4: Map Power and the Target Landscape

The internal field map answers "who are we?"; the **power map** answers "who decides, and who moves them?" For each priority objective, map the actual decision-makers (legislators, regulators, executives, courts), the influencers who move them (donors, industry associations, peer institutions, media voices, constituencies they answer to), and the persuadable middle. Plot actors on a spectrum of allies — from active allies through neutrals to active opponents — and note, for each priority target, what power resources bear on them and who in your field holds any of those resources. The power map is where movement intelligence connects directly to campaign strategy: it converts the ecosystem picture into a theory of leverage.

Step 5: Follow the Resources

Resource flows are the skeleton of a field, and much of the skeleton is public. Using tax filings, grants databases, annual reports, and government grant records, a **resource-flow analysis** can establish: the field's approximate total funding and its trend; concentration (what share flows from the top three to five funders — the field's dependency risk); distribution across theories of change, geographies, and organization sizes; and multi-year versus project-restricted composition. Complement money-mapping with a capacity layer: staff counts, volunteer bases, and shared infrastructure (lists, technology, legal capacity, physical space). The most consequential findings are usually structural: an entire strategy lane funded by a single foundation, or ninety percent of resources held by organizations representing ten percent of the field's activity.

Step 6: Monitor Narratives and Public Opinion

Narrative intelligence has three layers. First, a **frame inventory**: catalogue the distinct frames used to argue your issue — by your field, by the opposition, and latent frames no one currently owns — with the values each invokes and the audiences each moves. Second, **media monitoring** against that inventory: alerts and periodic sampling that track which frames are gaining or losing ground, not merely

how often the issue is mentioned. Third, **public opinion tracking**: existing academic and independent public-opinion trackers where they cover your issue, and modest commissioned polling where they do not. Social listening can supplement all three, within firm ethical limits: aggregate public discourse only — never monitoring of individuals, and never collection from private or semi-private spaces.

Step 7: Watch the Opposition — Ethically

Guide 1's case evidence is typical: opposition infrastructure is usually visible in public sources long before it strikes, and the failure is that no one owns the watching. Systematic opposition monitoring tracks: opposing organizations and their staffing and budgets (from public filings); their funders; their legislative and regulatory activity (bills, model legislation, comments, lobbying disclosures); their litigation; and their messaging and frames.

The ethics of this work must be written down before the work begins. The **Opposition Monitoring Protocol** has bright lines: public sources only; no deception, no false identities, no infiltration of meetings or private spaces; no collection on individuals' private lives — organizations and public conduct are the subjects, not persons; full legal compliance in every jurisdiction; and the symmetry test — collect nothing by a method you would denounce if used against your own field. A protocol is not only an ethical safeguard; it protects the credibility of the intelligence and the reputation of the field if the work ever becomes public.

Step 8: Listen to the Field Directly

The people doing the work hold intelligence no external source contains: real capacity, morale and burnout, emerging priorities, quiet conflicts, and where the field believes it is heading. Three listening methods, in ascending depth:

- **Field surveys** — an annual "state of the movement" survey of organizations and practitioners covering capacity, compensation and wellbeing, strategic priorities, collaboration patterns, and perceived field needs. Design essentials: a defined sampling frame drawn from the actor map; instrument brevity (20 minutes maximum); confidentiality with aggregate-only reporting; and — decisive for both response rates and legitimacy — results returned to respondents first, in a useful form.
- **Intelligence interviews and listening tours** — semi-structured conversations with fifteen to thirty actors chosen to span clusters, sizes, and theories of change, including critics and isolates. A consistent protocol (same core questions across interviews) is what converts pleasant conversations into comparable evidence.
- **Convening-based sensing** — treating conferences, coalition meetings, and gatherings as structured listening opportunities: what is on the agenda versus five years ago, what happens in hallways, who is present and who has stopped coming.

Step 9: Synthesize and Deliver

Raw findings are not intelligence. The synthesis discipline: **validate** (does more than one independent source support the finding?), **assess significance** (what does it change about our understanding of the field?), **analyze implications** (what should someone consider doing differently?), and **deliver** in a form decision-makers will actually absorb. The core output is the **Ecosystem Synthesis Brief**: three to six pages, structured as findings, so-what, and options — never a data dump. Visualize where structure

carries the message (network maps, theory-of-change grids, funding flow charts) and write plainly where it does not. Finally, version the map: an ecosystem picture is a living document with a named owner and a refresh cadence (typically an annual full refresh with quarterly updates to the fastest-moving layers — opposition, policy environment, and narrative).

Tools and Templates

Ecosystem Boundary Canvas: Issue scope | geographic scope | actor types in/out | time horizon | the five to seven priority intelligence questions, each linked to a named decision.

Actor Mapping Matrix: Name | type | theory of change | strategies | geography and constituency | scale band | key relationships | confidence | notes.

Relational Survey Instrument: Three name-generator questions (collaborate / share information / call in a crisis), plus two field-perception questions; deployable in any survey tool.

Movement Power Map: Decision-makers | influencers | spectrum-of-allies placement | power resources | field assets that reach each target.

Resource-Flow Worksheet: Field funding total and trend | top-funder concentration | distribution by theory of change, geography, and organization size | restricted vs. flexible composition | capacity layer.

Frame Inventory: Frame | who uses it | values invoked | audiences moved | trajectory (gaining/stable/fading).

Opposition Monitoring Protocol: Scope | sources | bright lines (public sources only; no deception; no personal-life collection; legal compliance; symmetry test) | review cadence | publication rules.

Field Survey Design Checklist: Sampling frame from actor map | instrument under 20 minutes | confidentiality and aggregate-only reporting | results-back-to-respondents plan | year-over-year comparability.

Ecosystem Synthesis Brief: Findings | so-what | options | confidence and gaps | next refresh date.

Recommended Reading: Peter Plastrik, Madeleine Taylor, and John Cleveland, *Connecting to Change the World* (2014); Valdis Krebs and June Holley, "Building Smart Communities through Network Weaving" (2002); Candid's Foundation Directory and mapping tools.

Case Vignettes

Case Vignette 1: The Survey That Surfaced a Capacity Crisis

A research intermediary serving a farmed animal protection movement ran the field's first annual practitioner survey — a twenty-minute instrument sent to staff and leadership across the movement's organizations, covering strategic priorities, collaboration, compensation, and wellbeing. The design followed the listening principles above: a sampling frame built from a shared actor map, strict confidentiality with aggregate-only reporting, and a public commitment that respondents would receive the full findings before any funder did.

The headline finding was not about strategy. It was that the movement's grassroots and mid-sized organizations were quietly hemorrhaging experienced staff — with compensation far below adjacent sectors, widespread burnout, and departure intentions concentrated precisely in the organizer and campaigner roles the field's strategies depended on. No individual organization had seen its own attrition as a field-level pattern; several had privately interpreted it as their own management failure.

Because the finding was field-level, credible, and shared, the response was field-level: two funders created a multi-year capacity and wellbeing fund, several larger organizations published salary bands to reset field norms, and the survey's year-over-year design let the field verify, three years later, that retention in the affected roles had measurably improved.

Key lessons: (1) The people doing the work hold intelligence that no funding database or media monitor contains — but only structured, confidential listening will surface it. (2) Patterns invisible at the organizational level become undeniable at the field level; that is the entire premise of movement intelligence. (3) Returning results to respondents first is not a courtesy — it is what makes the next year's survey possible.

Case Vignette 2: The Network Map and the Single Point of Failure

A digital rights coalition commissioned a lightweight network mapping exercise — a relational survey of forty-two organizations — expecting to learn where to recruit new members. The map instead revealed a structural risk: nearly every bridge between the coalition's litigation cluster, its grassroots organizing cluster, and its policy cluster ran through one mid-sized organization, whose convening staff had become the field's de facto coordination infrastructure. The organization itself had no idea it occupied this position.

Eight months later, that organization lost its largest grant and cut the convening team. Because the field had seen the map, it did not discover the fragility by experiencing it: three organizations had already agreed to co-host the cross-cluster convenings, a shared contact directory had been stood up, and two deliberate bridge relationships had been cultivated between the litigation and organizing clusters. When the broker organization contracted, coordination wobbled but did not collapse — and the coalition's rapid response to a major surveillance bill that year still functioned.

Key lessons: (1) Network structure is invisible from inside any single node — including to the actors on whom the whole structure depends. (2) Over-centralization is a field-level risk that field-level intelligence can catch while there is still time to build redundancy. (3) A modest method — one relational survey, one afternoon of analysis — was sufficient; the barrier to network intelligence is rarely technical.

Metrics and KPIs

Metric / KPI	What It Measures	How to Measure
Priority question coverage	Whether intelligence work maps to real decisions	Share of active methods traceable to a question in the Boundary Canvas

Metric / KPI	What It Measures	How to Measure
Actor map coverage and freshness	Inventory quality	Share of known field actors profiled; share of profiles updated within 12 months
Relational survey participation	Field trust and network data quality	Response rate; year-over-year trend
Triangulation rate	Analytical rigor	Share of synthesis findings supported by two or more independent methods
Synthesis cadence adherence	Delivery discipline	Briefs delivered on schedule vs. planned (e.g., quarterly)
Findings-to-decisions conversion	Strategic translation	Documented decisions per synthesis brief within two quarters of delivery

Risks and Mitigations

Risk: Mapping becomes an end in itself — endless cartography that consumes capacity and defers decisions.

Mitigation: Cap the method set by the priority questions; time-box each cycle; ship the synthesis brief on schedule at whatever completeness has been reached.

Risk: Stale maps quietly misleading strategy a year after they were accurate.

Mitigation: Name an owner, set a refresh cadence, and stamp every map and brief with its as-of date and next refresh date.

Risk: Sensitive field data leaking — actor capacities, network structure, and survey microdata are all valuable to hostile actors.

Mitigation: Minimize collection, aggregate by default, tier access, and apply the Guide 3 data governance checklist before the first datum is gathered, not after.

Risk: Opposition monitoring drifting across ethical lines under campaign pressure.

Mitigation: A written protocol adopted in advance, a named reviewer, and an annual audit of sources and methods against the bright lines.

Risk: Survey fatigue and extractive-research resentment poisoning field participation.

Mitigation: Consolidate instruments across the field where possible, keep them short, and return results to contributors first and visibly.

Implementation Checklist

- [] Ecosystem Boundary Canvas completed; five to seven priority intelligence questions written and linked to decisions
- [] Actor Mapping Matrix built for the field's significant actors, with confidence levels
- [] Relational survey designed and fielded; clusters, bridges, and isolates identified
- [] Power map drafted for at least one priority objective

- [] Resource-flow analysis completed from public data; concentration and gaps documented
- [] Frame Inventory drafted; media monitoring configured against it
- [] Opposition Monitoring Protocol written, adopted, and assigned an owner and reviewer
- [] Field listening plan set: survey, interviews, or convening-based sensing scheduled
- [] First Ecosystem Synthesis Brief delivered to named decision-makers
- [] Map ownership, as-of dating, and refresh cadence established

Glossary

Actor Map: A structured inventory of the organizations and formations in an ecosystem, with their types, theories of change, strategies, scale, and relationships.

Network Map: A representation of the relationships among field actors — collaboration, information-sharing, trust — analyzed for clusters, bridges, isolates, and centralization.

Broker / Bridge: An actor whose relationships connect otherwise separate clusters of a network, carrying disproportionate coordination capacity and risk.

Power Map: An analysis of the decision-makers relevant to an objective, the influencers who move them, and the resources that bear on each.

Spectrum of Allies: A campaign-planning tool placing actors on a continuum from active allies through neutrals to active opponents, used to set persuasion targets.

Resource-Flow Analysis: The study of how money, labor, and infrastructure move through a field, including concentration, distribution, and dependency risks.

Frame: A way of arguing an issue that invokes particular values and defines the problem, cause, and remedy; fields and their opponents compete through frames.

Field Survey: A recurring, confidential survey of a field's organizations and practitioners covering capacity, priorities, collaboration, and wellbeing.

Name Generator: A survey question asking respondents to name specific others (e.g., closest collaborators), the basic instrument of relational data collection.

Synthesis Brief: A short decision-oriented document structured as findings, implications, and options — the standard output of an intelligence cycle.

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