

Measuring Collectivization Initiatives: Creating a Knowledge Base from Collective Voices

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Background: Evaluation under the transformational imperative is widely called for, yet dominant evaluation frameworks remain rooted in linear logics, pre-set indicators, and donor facing accountability structures. These frameworks are particularly ill suited to collectivization—the dynamic, relational process through which groups organized around shared experiences of marginalization develop critical consciousness and collective agency. Existing evaluation scholarship has engaged complexity and systems change conceptually, but rarely grounds this engagement in sustained, practice-based work with collectives themselves.

Purpose: Conventional evaluation tools, built on linear logics and preset indicators, routinely fail to capture what matters most in collective life: shifts in solidarity, nonlinear cycles of struggle, and intersecting forms of oppression. This article responds to that gap, examining what evaluation practice must become—in its assumptions, tools, and relational ethics—to meaningfully measure and support collectivization, understood through a Gramscian lens as the collective development of critical consciousness among those organizing against shared marginalization. The research provides depth, context, and interpretation rather than generalizability or prediction.

Setting: The inquiry spans 11 collectives across South Asia, Southeast Asia, and Kenya. These collectives organize across sectors including sanitation, informal labor, migration, survivor support, disability, and gender. Two collectives—sanitation workers and Bidi workers, both in South Asia—were engaged through sustained deep dive dialogue, while the wider group was engaged through open conversations

and a multi-country cross regional workshop. The setting is therefore best understood not as a single fixed location but as a relational field.

Intervention: Not applicable.

Research Design: A dialogic and adaptive practice-based inquiry developed through sustained, long-term engagement with collectives, conducted as part of the Sindhanai (critical reflection) initiative. The approach drew on open-ended conversations, deep dive engagements with two collectives, a multi-country cross regional dialogue, and the co-development of metaphors and reflective tools as sensemaking devices rather than analytical frameworks.

Data Collection and Analysis: Not applicable.

Findings: Six metaphors emerged through deep dive engagement, translating into three core principles for evaluation practice: attending to diversity within collectives, prioritizing process alongside outcomes, and treating evaluator positionality as constitutive rather than incidental. Further analysis surfaced the nonlinear, cyclical nature of collective transformation; the necessity of intersectional analysis across interlocking systems of oppression; and the risks of projectization, whereby donor accountability requirements can reshape collectives from people owned struggles into donor-facing service providers. Seven orientations for reframing measurement are proposed, foregrounding energy, relationality, intersectionality, and the prevention of regressive change as legitimate but routinely overlooked dimensions of collective transformation.

Keywords: *collectivization; transformational imperative; participatory evaluation; non-linearity; intersectionality; decolonial epistemologies; Global South; complexity; collective action*

We are living in an era of polycrisis, where climate change, deepening inequality, political instability, and ecological breakdown do not occur in isolation, but in compounding and mutually reinforcing ways (Tooze, 2022; Lawrence et al., 2024; Ndlovu-Gatsheni, 2013). Each crisis feeds into the others, creating feedback loops that deepen their impacts and strain institutions designed to address problems one at a time (Malpass, 2022). In such a context, quick fixes or incremental reforms to existing systems, however well-intentioned, are often inadequate. This condition of polycrisis has sharpened calls for a transformational imperative—a shift away from incremental, project-bound interventions toward approaches capable of addressing root causes, power relations, and structural drivers of inequality (Chaplowe & Hejnowicz, 2021; Chilisa & Rawlinson, 2019). The Three Horizons framework offers one way of understanding this shift, where Horizon 1 represents the dominant logic of linear, output-focused evaluation, Horizon 2 the transitional terrain of reflexive and context-sensitive practice, and Horizon 3 the transformative possibility of evaluation that is genuinely accountable to collective agency and systemic change (Ofir et al., this issue). This article is explicitly positioned within that third horizon—not as an arrival point but as a direction of travel. Within this context, evaluation becomes not merely a tool for tracking change, but a practice that shapes how transformation itself is defined, legitimized, and pursued—and by whom.

Every revolution has been preceded by an intense labour of criticism, by the diffusion of culture and the spread of ideas among masses of men who are at first resistant and think only of solving their own immediate economic and political problems for themselves, who have no ties of solidarity with others in the same condition. (Gramsci, 1971, p. 12)

This article examines that challenge through the lens of collectivization—understood, in the Gramscian tradition, as not merely the coming together of bodies but the collective development of critical consciousness, the diffusion of ideas, and the slow, contested labor of building solidarity around shared analyses of structural conditions (Gramsci, 1971; Alvarez et al., 1998). We argue that evaluation, if it is to serve the transformational imperative, must be fundamentally rethought, in its assumptions, its

power relations, and its accountability structures, and that collectives offer a generative site through which such rethinking becomes possible. Central to this rethinking is the development of evaluative thinking: the cultivation, within and alongside collectives, of critical reflective capacities grounded in their own knowledge traditions rather than imposed through external frameworks (Patton, 2018; Buckley et al., 2015; Chilisa, 2012; Cram & Mertens, 2016). The claims developed here are grounded in engagement with collectives specifically, but are offered as contributions to wider debates about how evaluation might better serve systemic change agendas.

Evaluation is both a mirror and a compass: a mirror that reflects the realities of the systems we are embedded in, revealing whose voices are heard, whose are silenced, and whose interests shape decisions; and a compass that can point toward alternative pathways (Schwandt, 2009; Patton, 2020). But the clarity of that mirror depends on the questions we ask, the perspectives we include, and the power dynamics we are willing to confront. When evaluation fails to interrogate these underlying forces, it risks reinforcing the very inequities it ought to challenge. Crucially, this failure is not only a matter of methodology or theory—it is, at its root, a question of power. A funder may hold genuinely transformational politics yet still commission evaluation that undoes that very politics, because the evaluative *approach* has been shaped by technicist, managerial, or donor-facing logics that operate independently. The problem, in other words, is not always what evaluation seeks to measure, but the power relations embedded in *how, by whom, and for whom* measurement is designed. Without a conscious effort to challenge these entrenched hierarchies, mainstream monitoring and evaluation frameworks, rooted in linear logic, pre-set indicators, and rigid timelines, can inadvertently reproduce the very inequities they seek to address (Schwandt, 2009; Eyben et al., 2015; Thomas & Narayanan, 2015; Patton, 2020; Picciotto, 2020; Global Change Center et al., 2024). This distinction, between the political agenda of evaluation and the power relations embedded in evaluative approach, is the diagnostic tension at the heart of this article, and it raises a prior question that runs through everything that follows: Is it possible to evaluate in ways that actively support the transformational imperative, including the work of collectives, rather than “projectizing” or fragmenting them?

It is within this landscape that collectives and collectivization emerge as a critical site of inquiry for evaluation. Collectives are not simply another category of development actor; they are spaces where collective agency is generated, where analyses of structural power are forged through lived experience, and where the terms of transformation are actively contested and negotiated. Collectivization, as used in this article, refers to the dynamic and relational processes through which such groups, organized around shared experiences of marginalization, exclusion, or struggle, come together around common goals, identities, or commitments to enable collective action. This is a deliberately Gramscian framing: Collectivization is understood not as a fixed organizational outcome but as an ongoing, ideas-driven process—the collective development of critical consciousness and shared evaluative thinking about the conditions of one's own oppression and the possibilities for transformation (Gramsci, 1971; Alvarez et al., 1998; Freire, 1970). Unlike policies, programs, or institutions, collectives do not operate through fixed mandates or predesigned logics of change; they are constituted through relationships, solidarity, and ongoing struggle. This article takes collectivization as its primary empirical lens, using engagement with collectives as a generative site through which broader arguments about evaluation and the transformational imperative are developed.

Collectives are increasingly recognized as critical actors in rights-based and transformation-oriented approaches, particularly in contexts where top-down interventions have failed to address structural inequities (UNICEF, 2021; Heydari Fard, 2024). At the same time, as more funders and development actors turn to collectives to advance agendas of “systemic change” and “collective impact,” there is a growing risk that collectivization is treated as a normative solution or “silver bullet” rather than as a complex political process. Such instrumentalization can obscure the internal tensions, uneven power relations, and moments of contestation that are inherent to collective action, and can lead to simplified expectations of coherence, effectiveness, or scalability that do not reflect lived realities.

Chungse Jung (2023) highlights that anti-systemic movements in the Global South mobilize against exploitation and exclusion within global capitalist structures, requiring approaches that account for these lived realities beyond Western biases (Jung, 2023). Anson Au

(2017) asserts that power in social movements is transient and embedded in collective agency, necessitating frameworks that capture complex political dynamics rather than reduce struggles to managerial outputs (Au, 2017). These perspectives affirm that evaluation tools must engage with collectives as dynamic, politicized processes grounded in local contexts, and that conventional models risk imposing Eurocentric logics that domesticate and fragment them (Jung, 2023; Au, 2017; Eyben et al., 2015; Batliwala & Pittman, 2010). Importantly, both perspectives also illuminate two distinct orientations toward collectivization that coexist within the development landscape: one more programmatic and donor-defined in its framing, the other more open-ended and movement-led. While their funding structures and political orientations differ, both converge in their stated aim of harnessing collective power as a pathway to social transformation—a convergence that itself warrants scrutiny, since shared language does not guarantee shared evaluative practice. Fundamentally, the integration of systems thinking and complexity-adaptive methods (Chaplowe & Mukoma, 2023; Gokhale & Walton, 2022) is necessary but insufficient: It is only when power is treated as the structuring problem (rather than theory or method alone) that evaluation approaches can meaningfully serve transformation in both principle and practice.

Yet evaluation has never been absent from collective life. Collectives have long engaged in their own forms of reflection, sense-making, and assessment, embedded in everyday organizing, relationships, and struggle, even if these practices do not resemble conventional evaluation frameworks. Indeed, this internal reflective practice is itself a form of evaluative thinking—one grounded in collective experience, accountable to members rather than donors, and oriented toward deepening shared analysis rather than producing external reports (Buckley et al., 2015; Cram & Mertens, 2016; Chilisa, 2012). The tension arises when collectives are asked to translate these lived, iterative processes into evaluative languages that privilege predefined indicators, measurable outcomes, and donor-facing logics; frameworks that prioritize external accountability and short-term outputs over internal learning and long-term transformation.

Evaluations which sideline or instrumentalize collectives fail to appreciate their depth as agents of transformative change. Collectives do not generate change through discrete, bounded interventions; they do so through the slow, nonlinear accumulation of

solidarity, shared analysis, and collective capacity—processes that unfold across time, relationships, and contexts that conventional evaluation frameworks are rarely designed to hold (Chaplowe & Hejnowicz, 2021; Rowlands, 1997). When evaluation reduces this work to predefined indicators or short-term outputs, it does not merely measure inadequately—it actively misrepresents the nature of the change being pursued, potentially delegitimizing the very processes that make transformation possible (Eyben et al., 2015; Batliwala & Pittman, 2010).

What becomes visible, or invisible, when collectives are required to articulate their journeys within dominant evaluative paradigms is therefore not merely a technical problem but a political one. Rather than treating these gaps as deficits to be corrected, in this article we approach them as sites of knowledge that reveal how collectives understand change, learning, and impact on their own terms. A central question running through the article is what meaningful assessment might look like from the standpoint of those doing the work of collective transformation—a question we return to substantively in the sections entitled Making Sense of Change and Reframing How We Measure Change.

We position this article as a practice-based contribution, reflecting on a dialogic and adaptive methodology developed through the authors' sustained engagement as a long-standing secretariat for multiple collectives across South Asia. The focus is on how collectives themselves articulate change—particularly those dimensions such as shifts in relationships, collective leadership, historical contexts, and collective identity that are frequently described as “intangibles” and are often sidelined in conventional evaluations—and on how evaluative thinking develops within and alongside collectives as a practice cultivated in relationship, grounded in decolonial and Indigenous epistemologies that resist the imposition of universal measurement standards (Chilisa, 2012; Cram & Mertens, 2016; Smith, 1999). We situate ourselves within a long tradition of thinkers and organizers who have insisted that evaluation, if it is to matter, must remain attentive to the lived experience of those bearing the costs of systemic injustice—the constituencies at the center of the transformational imperative—accountable to those most affected, and grounded in struggles for dignity and justice (Batliwala & Pittman, 2010; Chambers, 1994; Podems, 2010). This tradition stretches across geographies and histories—from Paulo Freire (1970), Kimberlé

Crenshaw (1989), B. R. Ambedkar (2014), Frantz Fanon (2004), bell hooks (1984; 2015), Achille Mbembe (2001), and Aníbal Quijano (2000), to name only a few. It includes feminist scholarship, Indigenous epistemologies, and movement-based knowledge that resist reduction into universal categories and instead foreground plurality, relationality, and accountability to communities (Alpizar Duran et al., 2007; Escobar, 2020; FRIDA, 2022; Batliwala & Pittman, 2010; Alvarez et al., 2014).

Our position is that evaluation frameworks engaging with collectivization, as distinct from broader claims about development evaluation writ large, must be rebuilt from these intellectual and epistemic genealogies. Rather than adopting imposed standards, we argue for an evaluative practice that grows out of the knowledge traditions of those who have long grappled with systemic oppression and collective transformation (Global North Dominance Watch, 2024). This means transforming it into a practice that strengthens collectivization, nurtures solidarity, and expands the space for systemic change. In what follows, we draw on sustained engagement with collectives to develop this argument—not as a finished position, but as a provisional and practice-grounded contribution to ongoing debates about evaluation and the transformational imperative.

This article builds on the initiative called சிந்தனை, Sindhanai—a Tamil-language word meaning critical reflection—a multi-year, practice-based inquiry we undertook in our roles as knowledge facilitators to multiple collectives across South Asia, Southeast Asia, and Kenya. Sindhanai was not designed as a formal evaluation or research project in the conventional sense; it did not begin with a prespecified research question or a fixed methodology. Rather, it emerged from ongoing accountability to the collectives it serves—an accountability that required developing new languages and practices for understanding change that existing evaluation frameworks could not adequately support (Southern Voices for Development, 2024). The terms of engagement were shaped by the collectives themselves: what to surface, how to articulate it, and what to do with what emerged were all subject to ongoing negotiation. The insights presented here are therefore not findings in the positivist sense, but reflections developed collaboratively, revised iteratively, and offered provisionally. The methodologies and tools presented here provide approaches to translating critical insights into evaluative practice. Each

illustrates a way to engage with complex, dynamic collectives, capturing their processes, impacts, and evolving strategies. By doing so, they highlight how evaluation can move beyond surface-level measures to meaningfully assess initiatives that are essential for societal transformation.

This article unfolds in four parts. Following this introduction, we first detail the methodology underpinning the work, including the dialogic, adaptive, and reflexive practices that shaped the inquiry. In the next section, we examine the process of collectivization, focusing on the metaphors developed and used by collectives to make sense of power, strategy, and collective action. Next, we turn to how change is understood and articulated in practice, drawing on collective narratives to surface insights on nonlinearity, intersectionality, internal tensions, and evolving philosophies of action. In the final two sections we reflect on the implications of these insights for transformation-oriented evaluation practice more broadly, particularly in relation to funder–collective relationships and the politics of measurement—considering what the specific experience of collectivization reveals about evaluation’s relationship to the transformational imperative at the field level.

Methodology: A Dialogic and Adaptive Engagement with Collectives

The methodological approach underpinning this article emerged through the authors’ long-term organizational engagement as a secretariat to multiple collectives, a role that involved convening dialogue, supporting internal reflection, and facilitating cross-learning across contexts. Working in this position meant inhabiting a space that was neither external evaluator nor movement insider, but was shaped by ongoing relationships, trust, and accountability to the collectives themselves. This positionality was not incidental to the methodology; it was constitutive of it. The kinds of knowledge that became accessible (about internal tensions, evolving priorities, and the

texture of collective life) were inseparable from the relational conditions under which they surfaced.

From the outset, the work was shaped by an awareness of the inherent tensions involved in documenting and framing collective processes for evaluative purposes. While the intent was to avoid extractive practices, it was recognized that the act of articulation itself is political, influencing what becomes visible, legible, or valued within evaluative systems. The methodology therefore sought not to resolve these tensions but to engage them reflexively and transparently. The approach taken here does not treat adaptation as a technique applied to a fixed frame; rather, the frame itself remained open to contestation and remaking by the collectives involved.

The engagement began with open-ended conversations with six collectives, focused on their experiences of interacting with funders and evaluators. These conversations surfaced recurring questions that collectives were routinely asked—largely around leadership, outreach, inclusion, and finances—dimensions of collectivization that the collectives themselves regarded as central to their organizing but found difficult to articulate in evaluative terms. They also surfaced dimensions of change experienced as significant yet routinely marginalized or rendered invisible within formal evaluation processes. Rather than being translated immediately into indicators or tools, these concerns were treated as entry points for collective reflection.

Following these initial dialogues, deeper engagement was undertaken with a small number of collectives—including collectives of sanitation workers and *bidi*¹ workers—to ground the inquiry in specific organizing practices. Online round tables with evaluators and grant makers opened uncomfortable but necessary conversations about how grant-making logics encounter collective struggles. A multi-country deep dive in Bangkok (bringing together four movements and a grant maker) created moments of resonance and friction across geographies, allowing for closer attention to organizing practices, internal decision-making, and evolving priorities. From this process, a set of provisional

¹ “Bidi” (also spelled “beedi”) refers to a traditional, hand-rolled cigarette made from unprocessed tobacco wrapped in tendu leaves, widely produced and consumed in India and other parts of South Asia. Bidi workers are primarily involved in rolling these cigarettes, often working in informal or home-based

settings under contractors. This workforce is largely composed of women and includes children, facing harsh conditions such as low wages, health risks, lack of social security, and exploitation due to unregulated labor practices in a fragmented industry dominated by subcontracting.

principles emerged that reflected what those collectives themselves valued in their journeys. These were not treated as conclusions, but as starting points for further, wider inquiry.

Subsequent engagements with collectives from South and Southeast Asia and parts of Africa were designed to test and complicate these emerging ideas across diverse contexts. These conversations again began openly, focusing on what each collective understood as the “intangibles” of its work, and on whether there were shared concerns, resonances, or tensions across collectivized struggles, and how these shifted when grounded in different political, cultural, and historical settings. The intent was not to arrive at a common framework but to identify whether certain core questions or orientations recurred, and what their variation revealed.

The 11 collectives engaged in this work span South Asia, Southeast Asia, and Kenya, and include collectives of sanitation workers organizing against caste-based labor exploitation in South Asia; bidi workers (predominantly women in informal labor) organizing across production networks in South Asia; migrant worker collectives navigating cross-border labor rights in Southeast Asia; survivor networks centering justice and lived experience in their organizing in South Asia; and collectives of gender and sexual minorities, persons with disabilities, and women from marginalized religious communities across these regions. Many of these collectives are embedded within or have emerged from broader social movement histories; where the term “movement” appears in participant voices we quote later in this paper, it reflects their own self-description and has been retained as such. In the analytical text, “collectives” is used as the governing term, consistent with the framing established in the introductory section of this paper.

These processes generated learning documents and exploratory tools, none of which were treated as finished products. Instead, they evolved through repeated use, reflection, and critique. The methodology remained dialogic and adaptive throughout; there was no predesigned evaluative frame to be applied across contexts. At times, a blank or provisional frame was offered to support reflection; at others, collectives chose to bend, rework, or discard it altogether. What surfaced were not conclusions or standardized measures, but shared principles that were partial, context-bound, and open to revision—informed by the recognition that all evaluative frames are political, and that participatory tools themselves

must remain open to critique and remaking (Southern Voices for Global Development, 2025).

The methodology is therefore best understood not as a technique but as a practice—one that prioritizes relational engagement, respects the autonomy of collectives, and situates reflection within the everyday work of collectivization rather than as an external imposition. We knew any frame is political; participatory tools, too, need to be undone and remade in alignment with people’s knowledge. The insights presented are therefore offered as provisional and situated, intended to contribute to ongoing conversations about how evaluation might better support collective agency and transformational change under conditions of polycrisis.

Collectivization in Practice— Principles, Metaphors, and Evaluative Implications

This section moves from the methodological orientations just described to the substantive insights that emerged through engagement with collectives. It has two interconnected purposes: first, to surface principles for understanding collectivization as a living, dynamic process; and second, to draw out the evaluative implications of those principles for those seeking to support or measure collective action. The section is organized around a set of metaphors that emerged organically from dialogue—not as illustrative devices, but as analytical tools through which collectives named their own complexity. These metaphors are then translated into three provisional principles for evaluation practice.

The inquiry involved two distinct levels of engagement. Across all 11 collectives, engagements took place through a combination of in-person gatherings and online dialogues, with interpretation support where needed. A deeper dive was undertaken with two collectives—a sanitation workers’ collective and a bidi workers’ collective, both in South Asia—with whom sustained, iterative dialogue was possible over a longer period. It was primarily through this deeper engagement that the metaphors presented in this section emerged—not as frameworks introduced by the research team, but as ways through which these collectives articulated complex problems, described internal dynamics, and made sense of their own journeys. They are offered here as illustrative examples grounded in

specific contexts, not as universal descriptors. What the wider engagement across all 11 collectives allowed was a process of identifying whether the core orientations the metaphors point toward recurred across different contexts, even where the specific language and imagery differed. The principles at the end of this section are the result of that cross-collective sense-making: provisional, situated, and open to revision.

As noted in the Methodology section, these engagements did not involve conventional data collection instruments. This bears brief restatement here because it shapes what follows: The metaphors presented in this section are not illustrations of findings generated through other means—they are themselves the primary analytical medium through which collectives surfaced and named their experience. Collectives shared stories of navigating a changing global landscape—migrant worker collectives in Southeast Asia contesting policies that undermine labor rights; survivor networks in South Asia centering justice and lived experience; leaders across contexts reflecting on the tension of engaging with funders while preserving collective autonomy and direction. It was within and through these conversations that metaphors became the tools through which complexity was named.

Metaphors as Analytical Tools

This engagement did not involve conventional data collection—no structured surveys, predesigned indicators, or quantitative tracking instruments were used. This was a deliberate analytical choice. One of the key ways to facilitate dialogue in this Sindhanai initiative is through metaphors. These are meant not to simplify complex concepts but to open dialogic spaces in which collectives can articulate experiences that do not lend themselves to linear sequencing or standardized measurement. Simplification too often implies a top-down transfer of knowledge, where one side “owns” the concept and the other merely “receives” it. Instead, metaphors here are about opening spaces of dialogue among different equals: the experiential and the scientific.

We draw, for instance, on the metaphor of waves (without fixed form, carrying force and energy in motion) and of tides, where the gravitational pull of the moon reveals the power of larger structures, whose meaning is grasped most vividly through lived experience. We use the difference between velocity and speed to show how direction shapes meaning as much as pace. A game of chess offers a lens to reflect on systems, structures, and strategy, while the distinction between a house and a home opens questions of belonging, meaning, and the intangible bonds that hold people together.

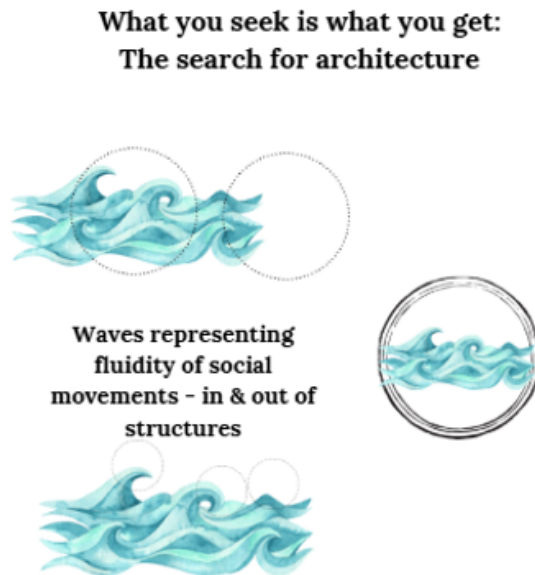
These metaphors emerge both from scientific phenomena and from rationalist traditions. But in our use, they are not merely illustrative devices; they are levelers. They invite different ways of knowing into shared conversation, validating scientific reasoning while affirming the dignity and insight of lived experience. In doing so, they open up dialogic spaces where collectives can reflect, question, and reframe their own journeys on their own terms.

Metaphors: Principles for Understanding Collectivization

The following six principles emerged from these dialogues. They are offered not as fixed conclusions but as shared insights that continue to evolve, grounded in what collectives themselves identified as most significant about their journeys. These principles are summarized in Table 1, which maps each metaphor to its meaning for understanding collectives and its implications for evaluation.

First (Figure 1), a collective can be seen as a wave: without fixed form, marked instead by motion, with ebbs and flows. Evaluators who seek clarity only in rigid hierarchies or formal leadership risk mistaking the crest for the wave itself, missing the deeper energies and forces that animate the collective. As one participant from a sanitation workers' collective in South Asia put it, “Our collective is not one collective. There are so many groups within our collective.” Many collectives we engaged recognized themselves as layered—smaller collectives overlapping within larger ones, becoming prominent at certain moments and receding at others.

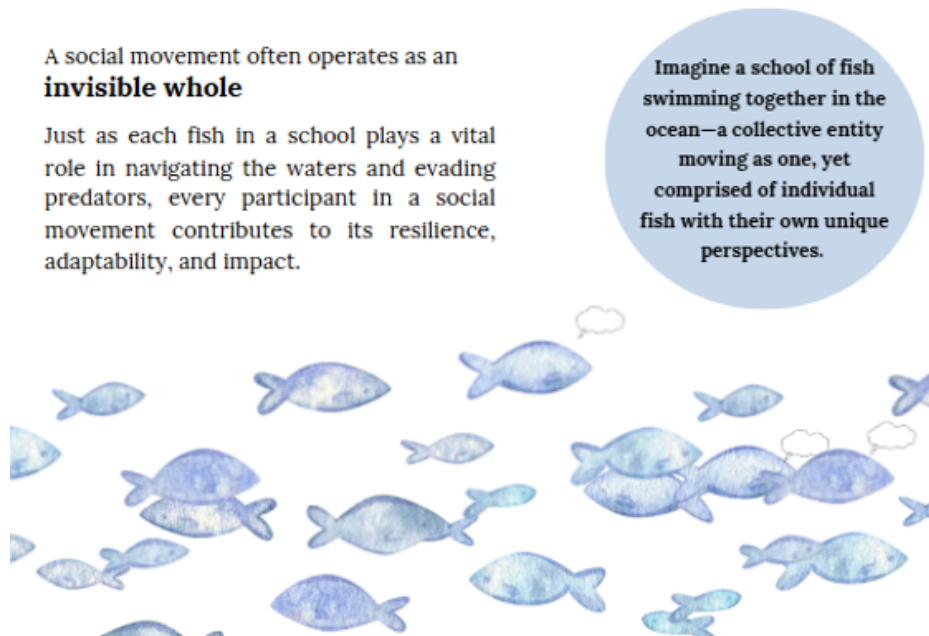
Figure 1. Collective as Wave



Second (Figure 2), a collective resembles a school of fish, moving together while containing difference. Members may hold divergent or even contradictory perspectives, and their practice of the collective's philosophy may be shaped by

daily struggles and structural pressures. This plurality is not fragmentation but vitality—a sign that transformation happens both internally within the collective and externally in its interface with society.

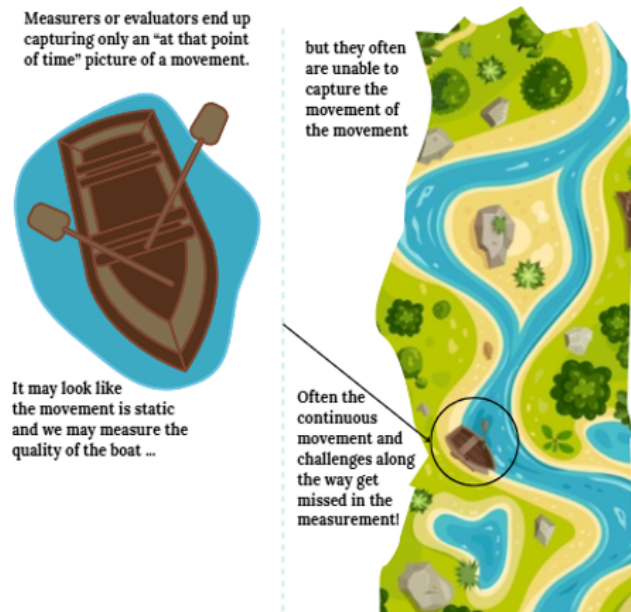
Figure 2. Collective as an invisible whole



Third (Figure 3), a collective is like a team rowing against a river's current: The journey's significance lies not in the boat's position but in the effort, coordination, and resistance experienced along the way. Evaluators who freeze

the journey at a point obscure the relational dynamics—the push of the rowers, the tug of the current, and the surges of collective energy that propel the collective forward.

Figure 3. The Collective Journey



Fourth, a collective is energy in transit, much like a wave transmitting force through water. Ideas, solidarities, and philosophies ripple through people, unsettling, connecting, and reshaping them, even when the surface appears still. As shared by a survivor collective in Kenya, “There are times when we need to take a step back and rethink our plans, but there is always energy moving among us, ideas and thinking of different ways of working—those keep us alive.”

Fifth, collectives rarely have a single origin. Their momentum emerges from the convergence of multiple disturbances—political openings, economic pressures, cultural shifts—that interact in complex and unpredictable ways. As members

from a migrant worker collective in Southeast Asia put it, “This collective didn’t begin in one place. We all had our individual journeys and so many reasons that brought us together. It came from many struggles coming together, from anger, from hope, from need.”

Sixth (Figure 4), a collective is like a tide, shaped by multiple pulls and pushes. Forces such as patriarchy, neoliberalism, caste, and other structural conditions produce currents and countercurrents that members navigate, often most acutely in the intimate terrain of lived experience.

Figure 4. Collective as Tide

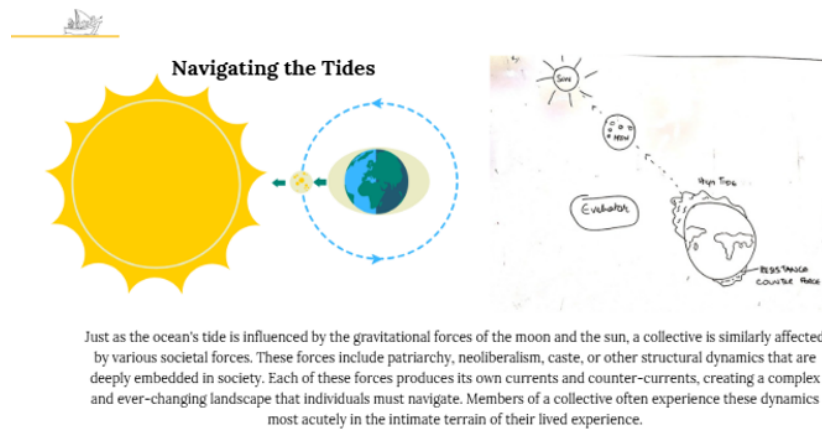


Table 1 elaborates on the six metaphors we've discussed, translating them into concrete evaluative implications. It is intended not as a checklist but as a practical thinking tool—a set of prompts for evaluators, funders, and collectives themselves when designing or engaging with evaluation processes. Each row moves from the

metaphor, through its meaning for understanding collective life, to the specific evaluative implications that follow. Read together, the six rows offer a layered picture of what evaluation adequate to collectivization might look like in practice.

Table 1. From Metaphor to Practice—Evaluative Implications of Collectivization

No.	Metaphor	Meaning for understanding Collectives	Implications for evaluation
1	Wave	Movements are fluid, shifting, and alive; visible structures are only surface crests.	Avoid focusing solely on leadership organograms or formal structures; recognize the deeper energy and dynamics. Include diverse participants.
2	School of fish	Members are diverse, sometimes contradictory; transformation happens within as well as outside the movement.	Engage multiple types of participants (core, peripheral, contradictory) to capture diversity of perspectives and internal dynamics.
3	Boat on a river	The journey, effort, and resistance matter more than static positions or outcomes.	Do not rely only on location or status indicators; capture the process, relational dynamics, and collective effort.
4	Energy flow	Movement is carried through ideas, solidarities, and philosophies, even if individuals appear still.	Measure energy in transit, relational and knowledge flows, and cumulative impact, not just visible outputs.
5	Origin of a wave	Movements rarely have a single starting point; momentum emerges from multiple, interacting disturbances.	Avoid oversimplifying origins; understand the interplay of political, social, and economic factors that drive momentum.
6	Tide	Movements are shaped by multiple structural forces (patriarchy, neoliberalism) and internal countercurrents.	Consider evaluator positionality; recognize structural pulls and internal resistance; reflexively engage with forces shaping the movement.

What is at stake is not simply methodological preference but epistemic accountability—ensuring that conversations about measurement reflect the systems, forces, and relationships shaping collective life, rather than the administrative convenience of those commissioning evaluation. Within this, metaphors become analytically significant. They are not decorative or simplifying devices, but tools that open up forms of reflection that conventional indicators may not capture. A metaphor of tides or waves, of a school of fish or a boat against a current, does not produce a number; instead, it generates a shared language through which collectives, evaluators, and funders can engage more honestly with what change is occurring, how it unfolds, and at what cost.

The three principles that follow are derived from cross-collective sense-making across the 11 collectives engaged in this work. They are offered not as prescriptions but as provisional orientations, as starting points for evaluators who are seeking to move alongside collectives rather than measure them from outside.

Three Evaluative Implications

From these principles, three implications for evaluation practice follow:

1. These metaphors help recognize diversity within collectives. Collectives cannot be captured by speaking only to leadership or by mapping formal structures. Evaluation must include diverse participants (core actors, peripheral allies, and those holding contradictory positions) if it is to reflect the full range of energy, practice, and relational dynamics. Without this, evaluations risk flattening complexity into misleading snapshots. Who is included in evaluation, and on whose terms, shapes what becomes legible as change, and what remains invisible.
2. Evaluators must focus on process as much as outcomes. Focusing solely on indicators or static metrics reduces collective action to coordinates, flattening its vitality into a snapshot. Evaluators should design tools and strategies that capture dynamic processes, relational flows, iterative learning, and temporal complexity. Collective transformation is a living, growing phenomenon; impact accumulates slowly, unevenly, and often invisibly within conventional evaluation time frames. The

question of how to describe and track impact over time, when the collective itself is an emergent and evolving being, is one that evaluation has not yet adequately answered. Part of what evaluation can do, and what this work attempted, is to support collectives themselves to name and claim their own trajectories: to articulate, in their own terms, how they have changed, what they have learned, and where they are going. This is not measurement in the conventional sense; it is the cultivation of evaluative thinking within collective life itself.

3. An evaluator's positionality is crucial. Like tides shaped by multiple gravitational pulls, movements are influenced by structural forces while also generating internal countercurrents. Evaluators are not outside these dynamics; their assumptions, institutional affiliations, and funding logics can distort and shape understanding if unexamined. One of the enduring challenges for evaluators working with collectives is the question of how to respond to conventional evaluation demands (from funders, institutions, and accountability systems) while also posing alternatives to those demands where they distort collective realities. Reflexivity without this practical reckoning risks becoming introspective rather than transformative. Evaluators working alongside collectives must therefore develop a dual capacity: to engage honestly with dominant frameworks where they cannot be avoided, and to advocate actively for alternative approaches where they can. This is not a comfortable position, but it is an honest one. Reflexive positioning allows evaluators to move alongside collectives, attuned to their philosophy, tensions, and surges of energy, without collapsing them into external frames.

Making Sense of Change—Insights from Collective Practice

The metaphors we've described (waves, tides, schools of fish, energy in transit) were not endpoints in themselves. They were entry points: ways through which collectives opened up deeper conversations about the nature of change, the experience of struggle, and the limits of conventional evaluation.

As these dialogues deepened across the collectives engaged in this work, a few

interconnected themes emerged with particular force and consistency. These include the nonlinear, cyclical nature of collective change; intersectionality; systemic shift and structural transformation; and the fear of “projectization.” These themes did not emerge from a predesigned analytical framework. They surfaced through the dialogues themselves—first through the deep-dive engagements with the two South Asian collectives described in the Collectivization in Practice section, and subsequently through cross-collective sense-making across the wider group. They are therefore offered here not as abstract theoretical propositions but as insights grounded in collective practice, which are then situated within the broader evaluation literature on complexity, systems change, and the transformational imperative. The question animating both subsections is the same: What does evaluation need to see, and how does it need to work, if it is to remain accountable to the living, entangled realities of collective transformation?

Measuring Change: Nonlinearity

A central challenge for evaluation under the transformational imperative is how change is understood, traced, and made legible over time. Nonlinearity is often acknowledged conceptually, yet it remains difficult to work with in practice. While the transformational imperative calls for attention to emergence, power, and systemic disruption, evaluative processes frequently continue to privilege moments of visible action, stabilized outcomes, and forward momentum (Chaplowe & Hejnowicz, 2021; Patton, 2020). This is not simply a methodological gap; it reflects a deeper epistemological problem. Evaluation frameworks rooted in linear logics—logframes, theories of change built on causal chains, milestone-based reporting—are not neutral instruments. They carry assumptions about how change happens that are often misaligned with the rhythms of collective life (Eyben et al., 2015; Picciotto, 2020). Complexity-informed evaluation scholarship has long argued that social change unfolds through feedback loops, adaptation, and periods of latency that resist capture in linear models (Nilsen & Motta, 2011; Gokhale & Walton, 2022).

Within collectivization specifically, this misalignment is acute: Phases of pause, retreat, internal disagreement, or recalibration, often central to sustaining collective agency, risk being read as stagnation or failure rather than as constitutive moments of transformation.

Attending to how collectives themselves make sense of cyclical movement, dormancy, and renewal offers a critical entry point for examining what evaluation recognizes as change, and what it renders invisible. We wrote the narrative that follows drawing on participatory documentation, discussions, and reflections shared by the Community Awareness and Action Group (CAAG), a collective of sanitation workers in South Asia. It is not a verbatim account produced by CAAG itself, but an interpretive synthesis, which we wrote and reviewed with CAAG members, intended to convey how members described the rhythms, reversals, and learning processes of their collective action (Southern Voices for Global Development, 2023). The narrative is the following paragraph; it is followed by analytical discussion:

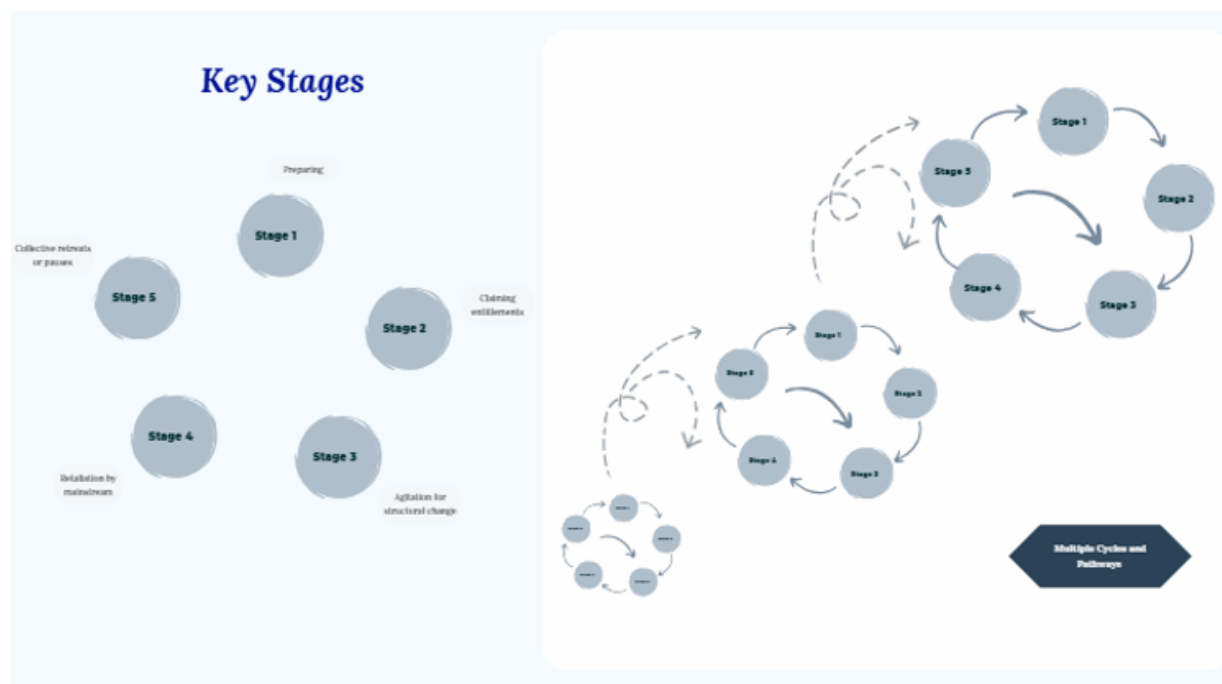
In a quiet hamlet, there was an outburst, in 2022–23. A group of sanitation workers—overlooked, silenced, victimized by the caste system—formed the Community Awareness and Action Group, or CAAG. Inspired by Ambedkar’s call to “Educate, Agitate, and Organise,” they began their journey. First, they spoke and listened. They educated their own community and the dominant residents about the hidden toll of caste and labor. Then, after a couple of months, they acted, protested: for 15 days, the streets lay unclean, the garbage uncollected, a silence that shouted louder than words. Through this, they learned the power of unity, of planning together, of holding a vision collectively. A small victory came: Six workers were officially recognized. They were given a proper written contract. But CAAG, with this success, demanded more—they wanted patta rights for the land they are residing. Agitation began again. This news spread fast. The local Panchayat pushed back. Children of sanitation workers were mocked in schools. Local police started visiting the hamlet. There was a threat of boycott of the entire community. Threats, conspiracies, and fear. Some workers, on their own, returned to work. They were helpless. The group paused, shocked, sensing the fragility of their struggle. No success this time. Yet reflection brought clarity. Without land or housing security, their fight for dignity could never be complete. CAAG returned to the beginning, wiser, ready to take up a new struggle—housing rights, justice, and recognition.

The collective's journey was not linear. It rose and fell like the tides, but even in dormancy, there was a fire. Each cycle grew stronger, each reflection deeper, expanding the circle of thinkers. CAAG was alive, even when it was dormant—in consciousness, carrying forward the promise of collective courage, learning, and transformation.

Through collective sense-making, this narrative was drawn into five stages—not as a fixed sequence but as a recurring, overlapping spiral (Figure 5). Stage 1: Preparing and building group awareness, where workers share experiences, compare wages, and begin to recognize that their hardships are systemic, not personal. Stage 2: Claiming entitlements, as they step into

municipal offices, file petitions, and insist on inclusion in welfare schemes. Stage 3: Agitating for structural change, when entitlements are denied and collective action escalates—exemplified here by a 15- to 20-day labor strike. Stage 4: Facing mainstream retaliation, as administrators offer partial recognition, caste elites issue threats, and workers face intimidation. Stage 5: Tactical retreat or dormancy, where energy dips and attendance thins—but this period becomes a time for reflection, recovery, and strategic recalibration. Retreat is not defeat but a seed for transformation.

Figure 5. Key Stages of the Narrative



Read through a transformational lens, and in dialogue with complexity-informed scholarship (Ramalingam et al., 2008; Chaplowe & Hejnowicz, 2021), these stages do not represent failure or stagnation. They illustrate how collective agency evolves through interaction with power, resistance, and constraint—dynamics that are central to systemic change but rarely rendered visible in conventional evaluation accounts. Evaluators who encounter a collective during Stage 5 may conclude that nothing is happening; the collective's own framing insists otherwise. CAAG members described themselves

as a "living collective" precisely to resist this misreading—to assert that rest, reflection, and the quiet accumulation of analysis are themselves forms of transformative work.

The journey of collectivization is thus cyclical, evolving, and alive. A collective moves through stages of awareness, entitlements, agitation, retaliation, and retreat—yet these stages are neither sequential nor uniform; they repeat, overlap, and transform as new issues emerge. Central to this process is Sindhanai (critical reflection), which enables the collective to surface root causes, reassess strategies, and

deepen shared analysis. As more members engage in this reflective practice, the circle of thinkers expands, strengthening the collective's capacity to interpret and respond to systemic injustice. The coexistence of multiple issue-based cycles within a single collective—different struggles at different stages simultaneously, shaped by shifting power relations across domains—means that at any given moment, a collective may be advancing in one arena while retreating in another. For evaluation aligned with the transformational imperative, recognizing this spiral—rather than searching for linear progression—is not optional. It is a precondition for understanding how change is generated, sustained, and reconfigured over time.

Measuring Change: Intersectional Oppression

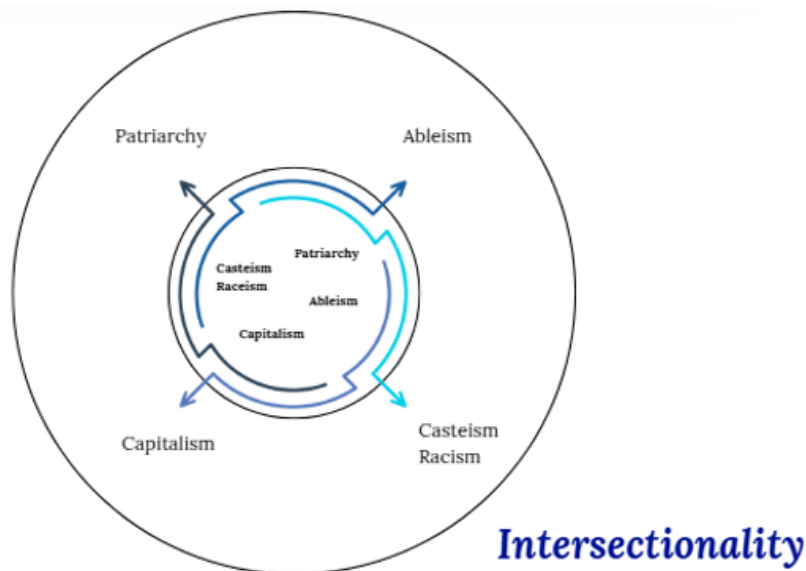
In our earliest dialogues with collectives, practical challenges in engaging with intersectional oppressions surfaced repeatedly. Most collectives set out to challenge the form of systemic oppression most immediate in their lives—a women's group mobilizing against patriarchy, a workers' collective against labor exploitation, a disability rights collective against ableism. This focus is both necessary and strategically effective. Yet as bell hooks argued, systems of domination are not discrete or separable; they are mutually reinforcing, and the struggle against one cannot be fully realized without reckoning with the others (hooks, 1984). Intersectionality, as theorized by Kimberlé Crenshaw, extends this insight structurally: systems of oppression such as race, gender, caste, and class are mutually constitutive, producing forms of marginalization that cannot be understood through single-axis frameworks and cannot be addressed sequentially or in isolation (Crenshaw, 1989). From this perspective, dismantling one form of domination does not automatically undo others; rather, caste, race,

gender, disability, and sexuality frequently intersect to reconfigure exclusion and constraint. Intersectional oppression thus describes the structural convergence of power relations, not merely the accumulation of identities.

This is substantiated not only theoretically but through the longstanding work of thinkers who have written from within experiences of overlapping oppression. Ambedkar's analysis of caste and labor, Fanon's account of colonial violence and racialized subjectivity, hooks's theorization of the interlocking nature of oppression, and Mbembe's work on necropolitics all converge on a shared insight: that no oppression exists in isolation, and that liberation movements which fail to reckon with their own internal hierarchies risk reproducing the very logics they seek to dismantle (Ambedkar, 2014; Fanon, 2004; hooks, 1984; Mbembe, 2001). For evaluation, this has direct implications: Progress registered against one system of oppression may obscure regressions elsewhere, or mask who benefits and who is left behind—raising critical questions about what is measured, whose experiences are centered, and how transformation itself is defined.

As shown in Figure 6, once the inner wall of a single "ism" is breached, an outer wall soon emerges—composed of other, interlocking systems such as caste, racism, ableism, heteronormativity, and patriarchy, which continually reinforce one another. The experiences of garment workers' collectives make this tension visible. Many begin by confronting unsafe working conditions, long hours, and wage exploitation. As these struggles gain momentum, other forms of exclusion become harder to ignore: Women garment workers face sexual harassment and gendered wage gaps, while migrant workers encounter exclusion along caste or ethnic lines, even within collectives pushing back against capitalist exploitation. Breaking down one wall does not automatically dismantle the others that intersect with it.

Figure 6. Intersectionality



To help navigate this terrain, some collectives use a reflective exercise that involves reviewing all decisions and activities (big and small, long-term and immediate) and categorizing them across three dimensions.

1. Challenging the ism: actions that directly disrupt the targeted oppression.
2. Neutral to the ism: actions that neither advance nor obstruct that struggle.
3. Leveraging the ism: actions that, consciously or not, draw on another oppressive system to gain short-term advantage.

It is the third category that demands the deepest and most honest reflection. A garment workers' collective might silence cases of sexual harassment to maintain unity around wage struggles, or allow male leaders to dominate negotiations. These choices perpetuate patriarchy even as capitalism is being resisted. Yet such compromises are often tactical—born out of survival and the need to build incremental power. By making these trade-offs explicit, collectives can distinguish between tactical compromises and practices that inadvertently harden inequities, while recognizing that both may be occurring simultaneously.

Measuring change, then, is not only about documenting gains against a single oppression. Any evaluation oriented toward the transformational imperative must trace how

strategies reverberate across the wider nexus of power—attending not only to what a collective has achieved, but to what has been left unaddressed, deferred, or inadvertently reinforced in the process. Table 2 illustrates how this intersectional sensibility can be translated into evaluative inquiry, by identifying observable areas of change that help make such dynamics visible over time. Intersectionality, in this sense, is not a checklist of multiple identities, but an ongoing practice: a way of seeing and interrogating how power operates in entangled forms, and how collective strategies can navigate this complexity with clarity, care, and courage.

Measuring Change: Evolving Indicators for Systemic Shift and Structural Transformation

Terms like *systemic shift* and *structural change* are often used when describing the ambitions of collectives. Yet, for collectives on the ground, translating such abstract ideas into practice is complex. Progress is rarely linear. As collectives move from securing individual entitlements to demanding broader change, their struggles inevitably collide with resistance from mainstream systems. These collisions expose not only institutional barriers but also the underlying structures and hidden forces that reinforce inequality.

Table 2. Illustrative Areas of Intersectional Change in Garment Worker Collectives

Focus area	Indicator	Questions to ask
Leadership diversity	Representation of women, Dalits, migrants, younger workers in leadership	Who speaks in meetings? Who negotiates with management? Are diverse voices visible in decision-making?
Addressing gender-based violence	Mechanisms to address harassment and discrimination	Are complaints acknowledged and acted upon, or silenced for “unity”? Do women feel safe raising concerns?
Equity in wages & conditions	Distribution of gains from negotiations	Do wage increases, safety measures, or benefits reach all groups equally, or do some workers benefit more than others?
Integration of struggles	Linking economic justice with social justice	Are campaigns about wages and safety connected to caste, gender, and migration struggles, or treated separately?
Shifts in narratives	Language and framing of collective demands	Has messaging evolved from single-issue (“fair wages”) to recognizing overlapping oppressions (“fair wages free from caste and gender bias”)?

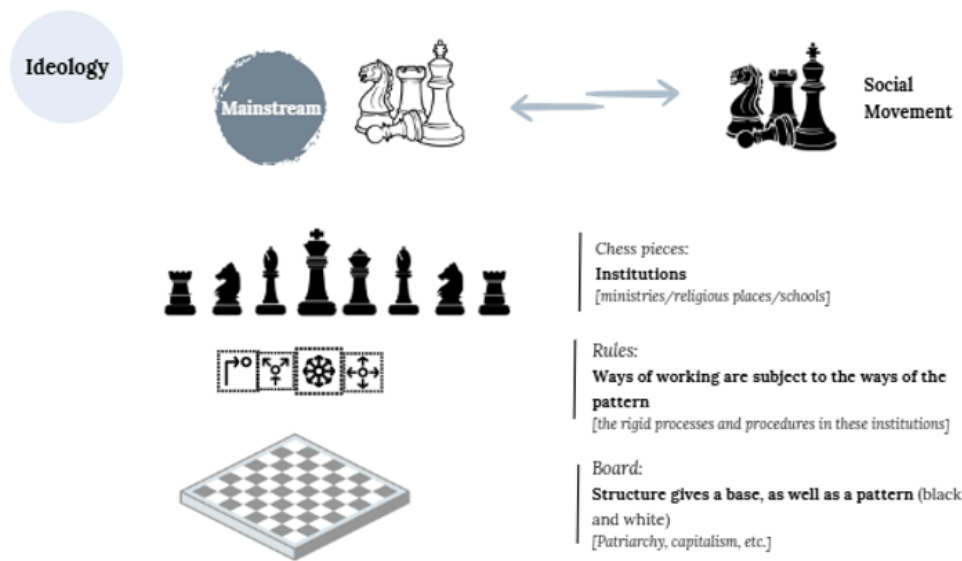
To understand and navigate these dynamics, collectives often require lenses that extend beyond immediate actions or outcomes. One useful metaphor is the game of chess, which emerged through discussion within the Sindhanai process and was used dialogically with the collective to enable reflection rather than explanation. Chess enables us to see not only who the actors are, but also the rules they play by, the board that holds them all, and the players behind the game who decide how it unfolds. From a transformational-imperative perspective, this framing helps surface how systems shape possibilities for action, adaptation, and resistance over time.

On the chess board, the white pieces represent the mainstream; those who usually move first and set the terms. The black pieces represent collectives and social movements, those who must respond strategically, anticipating each move while holding onto their vision of change. Importantly, the metaphor also

draws attention to the rules of the game and to actors beyond the board—those who design institutions, allocate resources, and define what counts as legitimate movement or success.

This analogy, illustrated in Figure 7, makes visible four layers of engagement that are often obscured in conventional evaluation, which tends to focus on discrete actions rather than relational power, strategy, and constraint. Rather than simplifying or depoliticizing collective struggle, the metaphor functioned as a shared sense-making device through which collective leaders and facilitators critically examined their own positioning, choices, and vulnerabilities. In this way, the metaphor was used not to judge collectives, but to enable dialogue in which evaluative assumptions themselves could be questioned and reshaped, aligning with transformation-oriented evaluation practices that foreground collective reflection over externally imposed analytic frames.

Figure 7. Illustration of the Chess Board Analogy



- The Pieces (Institutions): the visible actors collectives engage with day-to-day. For example, municipalities, government departments, contractors, and political representatives.
- The Rules: the policies, laws, and norms that govern how these institutions operate, such as caste-based occupational roles or legal exclusions that deny sanitation workers protections.
- The Board (Structure): the deeper systems of power—patriarchy, caste, capitalism—that shape and stabilize the rules of the game.
- The Players Behind the Game: those who decide how the game unfolds. For example, those playing white are the “moral guardians” of the caste system—dominant caste bureaucrats, religious leaders, and societal institutions defending hierarchy. Those playing black are anti-caste individuals and groups seeking to disrupt, resist, and rewrite the game itself.

The sanitation workers’ movement illustrates how these layers play out. Their initial struggle was against immediate institutions—the local municipality and contractors responsible for unsafe working conditions. Soon, they recognized that rules embedded in law and policy systematically excluded them from protections

and reinforced caste-based employment. As their struggle deepened, they confronted the “board” itself: the caste system that links sanitation work to Dalit communities, and patriarchal norms that assign the most degrading forms of work to women.

But even the board is not the final layer. Behind the structures are the players—the decision-makers who defend the system. Bureaucrats who enforce caste-based practices in hiring, religious authorities who sanctify untouchability, and dominant caste leaders who shape public opinion. These actors play to maintain their advantage. In response, anti-caste movements seek to transform the very terms of play—turning a game designed to maintain hierarchy into a field of struggle for justice and dignity.

The chess analogy, summarized in Table 3, helps collectives visualize these layers of struggle. It provides a framework to distinguish between tactical victories against institutions; strategic challenges to laws and norms; structural confrontations with systems of power; and ideological struggles with those who design and defend the game, thereby also addressing the transformational imperative by revealing how change operates across multiple, interlinked levels.

Table 3. Mapping Power Through the Chess Analogy

Layer	What it represents	Guiding questions	Examples from sanitation workers' collective
Pieces (institutions)	Stakeholders and organizations that directly shape daily interactions	Which institutions must the collective engage with?	Municipal bodies, sanitation departments, contractors, local political leaders
Rules	Policies, laws, norms, and procedures governing interaction between institutions and people	Which rules need to be challenged, reformed, or redefined?	Employment contracts, caste-based occupational norms, laws excluding sanitation workers from protections
Board (structure)	The foundational system organizing society and maintaining inequities	What structural barriers shape the conflict itself?	Caste hierarchy linking sanitation work to Dalit communities; patriarchal norms reinforcing division of labor
Players behind the game	The forces that design and control the system	Who sets the agenda, frames the narrative, and benefits from the current arrangement?	Those playing white: moral guardians of the caste system—dominant caste bureaucrats, religious leaders, and social institutions defending hierarchy. Those playing black: anti-caste individuals and groups, resisting and reimagining the rules of the game.

This layered analysis underscores a crucial point: Meaningful change cannot be measured only through immediate gains such as wage increases or safer workplaces. These victories matter and are essential, but they remain fragile if the rules, the board, and the players behind the game are left untouched. Structural transformation requires collectives to reflect critically across all these layers—through சிந்தனை (Sindhanai), or deliberate critical inquiry—and to evolve strategies that reach beyond entitlements toward challenging the systems and actors that reproduce inequality.

By mapping their struggles across institutions, rules, structures, and players, collectives can better anticipate resistance, identify points of leverage, and craft strategies that move beyond survival toward systemic shifts. In this way, the chessboard metaphor becomes not only a lens for understanding conflict but also a guide for measuring change that is deep, and lasting.

Resisting Projectization and the Fear of NGO-ization

The imposition of project-based evaluation logics onto collectives can contribute to what scholars

term NGO-ization (Jad, 2007; Alvarez, 2009)—the transformation of fluid, member-driven organizing into more bureaucratic, donor-facing entities. In other words, evaluation does not simply record collective activity; it can reshape the very nature of that activity (Chaplowe & Engo-Tjéga, 2007). It is important to note, however, that the tendency toward centralization and bureaucratization is not exclusively a product of donor influence. It is a long-standing structural feature of social movements and collectives as they mature and grow—a developmental tendency that exists independently of funding relationships, even if donor dependencies can accelerate or intensify it. Distinctions further arise between funders who attempt to “manufacture” collectives versus those supporting pre-existing, organic collectives with flexible, risk-tolerant resources (Mahomed et al., 2020). Risk tolerance is particularly salient: Collectives operate through experimentation and adaptation, often requiring long time horizons before impact becomes visible. Funders with low risk tolerance typically demand predetermined indicators and short-term results, inadvertently incentivizing collectives to pursue safer, more measurable activities over transformative but uncertain strategies. The link between quantitative-focused measurement logics and

projectization is not incidental here: When donor accountability requirements are structured around numerical indicators and short reporting cycles, they create institutional pressures that favor documentation over organizing, compliance over strategy, and outputs over solidarity (Incite! Women of Color Against Violence, 2017). Core tensions persist: the challenge of balancing funder accountability and collective autonomy, and the risk that donor-defined indicators displace collective priorities.

Funding sustains programs, pays staff, and enables collective action. Yet it also carries risks. The way resources enter and circulate within a collective can subtly reshape its character—introducing hierarchies, shifting priorities, and fostering dependencies. Over time, these shifts can hollow out the ethos of a collective, transforming it from a people-owned struggle into a project or service provider. This slow drift is often described as projectization or NGO-ization (Jad, 2007; Alvarez, 2009). The relationship between funding and organizational drift is not straightforwardly causal, however. Not every shift in a collective's character is caused by funding, even when funding changes and organizational shifts occur simultaneously. Collectives are shaped by multiple forces—political contexts, membership changes, generational transitions, and the evolving nature of the struggle itself—and evaluators must resist attributing all internal transformation to funding dynamics alone.

We use the analogy of an angiogram (a medical imaging technique that traces the body's circulatory system to identify blockages or imbalances) to explain a reflective tool developed through this work, the fund angiogram. Much like its medical counterpart, the fund angiogram maps how resources flow into and across a collective, helping make visible the often-invisible dynamics of funding. It surfaces questions of health and imbalance: where flows are sustaining the collective, where dependencies are forming, and where power asymmetries may be emerging.

The fund angiogram is intended to serve two distinct but related purposes. As an evaluative tool, it reframes the conversation about funding from one of efficiency and compliance to one of power, agency, and collective vitality—shifting evaluative attention from whether funds were used as planned to how funding relationships are reshaping the collective's character and direction. As a pedagogic and collectivization tool, it supports collectives themselves to develop critical awareness of how external resources interact with

internal dynamics, enabling more deliberate and politically conscious navigation of funding relationships. Both purposes are equally important, and the tool is most powerful when used in ways that hold them together.

Importantly, the fund angiogram is not intended as a definitive model or checklist. It is offered here as one illustrative example of how resource flows can be mapped and analyzed—an approach that can be adapted, combined with, or replaced by other mapping tools depending on context, purpose, and stage of struggle. It can be usefully complemented by other forms of systems mapping (such as those examining causal relationships, enablers and barriers, feedback loops, or leverage points), depending on the evaluative purpose and the collective's own priorities.

At its core, the tool prompts four simple yet critical questions: Who controls the flow of funds into the collective; how are these resources distributed internally and externally; what dependencies or hierarchies are created through these flows; and how do they affect priorities, decision-making, and power relations?

Funding and Emerging Gatekeepers

Funding relationships are rarely neutral. They come with expectations that can reshape how collectives organize themselves and function. As Chaplowe (2023) argues in his account of what he terms obsessive accountability disorder, the cumulative weight of donor accountability requirements (reporting cycles, indicator frameworks, compliance demands) can produce a systemic distortion of collective priorities that is institutional rather than intentional: No single funder need be acting in bad faith for the overall effect to be corrosive (Chaplowe, 2023). Within communities, resources may create new hierarchies (those who benefit directly, manage stipends, grants, or leadership roles) and positions of influence. This can create friction, especially if funding priorities shift. While this can initially feel like empowerment, it can also create gatekeepers whose interests diverge from the collective's wider vision.

For example, entrepreneurship grants for sanitation workers may, over time, consolidate power in the hands of a small group who benefit disproportionately. These leaders may then resist changes in funding patterns that threaten their position. What began as an opportunity for empowerment risks becoming a source of dependency, reordering the internal power map

of the collective. Again, however, it is worth holding this analysis carefully: Not all emerging leadership within collectives is a product of funding dynamics, and not all consolidation of influence is harmful. The analytical task is to distinguish between forms of leadership and capacity that strengthen collective agency and those that narrow it—a distinction the fund angiogram can help surface.

Beyond Mapping: Linking Funds and Power

The angiogram is most effective when paired with power mapping: looking not only at where money flows, but at whose influence grows or diminishes as a result. This includes asking how funder conditions shape strategies and priorities; how resource access reconfigures influence within the collective; and how narratives and engagement styles shift to align with donor expectations.

Not every shift caused by funding is harmful. Some may strengthen collective capacity or visibility. The key lies in recognition and intentionality. By tracking how resources shape power and focus over time, collectives can make conscious decisions: which shifts to embrace because they serve the vision, and which to resist

because they compromise it. In this sense, the fund angiogram is not just a diagnostic tool and not just an evaluation framework. It is simultaneously a pedagogic device and a way for collectives to hold themselves accountable to their own ethos, remaining alert to how external support interacts with internal dynamics, and choosing deliberately how to navigate the unavoidable realities of funding without losing sight of their collective purpose.

The Fund Angiogram—Mapping the Flow of Resources in Collectives

The matrix in Table 4 is offered as one illustrative example of how resource flows can be mapped. It is not a prescriptive or exhaustive model, and is best understood as a starting point for collective sense-making rather than a checklist to be completed. It can be used alongside other analytical tools, including power mapping, systems mapping, and intersectional analysis, depending on the purpose and context of the evaluation.

Table 4. An Example of How Resource Flows Can Be Mapped

Aspect	What it reveals	Guiding questions	Examples from collectives
Sources of funds	Where money enters the system and what conditions are attached	Who controls the flow of funds? What expectations accompany them?	Single donor with strict reporting requirements; mix of grants, CSR funds, community contributions
Distribution of funds	How resources are allocated within the collective and community	How are funds distributed across salaries, programs, infrastructure, and member benefits?	Salaries for staff, stipends for leaders, entrepreneurship grants for select members
Dependencies and power	How funding shapes influence and creates hierarchies	What relationships and gatekeepers emerge from funding flows? Who gains or loses power?	Individuals receiving grants rising as informal leaders; donors influencing strategy
Shifts in priorities	How funding changes narratives, focus, or practices	How do funds affect decision-making, identity, and long-term goals?	Collective shifts from mobilization to service delivery; reporting and compliance overshadow community organizing

Reframing How We Measure Change

Measurement has always been part of a collective's journey. Through reflection, debate, and the everyday practices by which groups assess their progress and recalibrate their strategies, collectives already engage in forms of evaluative thinking—often without naming them as such. The first task of evaluation, therefore, is not to introduce measurement from outside, but to recognize, affirm, and build upon these existing practices. This is itself a political act: It repositions collectives as the primary knowers of their own change, rather than as subjects of external assessment.

Alongside this, there is a second, equally important task: creating space for metrics and

approaches that can capture what conventional frameworks routinely miss—the intangible but consequential dimensions of collective life, including energy, philosophy, belonging, resistance, and the prevention of regressive change. These two tasks are not sequential; they proceed together, each informing the other.

From our dialogues, seven orientations emerge for reframing measurement in ways adequate to collectivization (Table 5). These are not definitive prescriptions but ways of re-seeing what matters when we speak of measuring collectives. They build on the analytical themes developed in earlier sections and should be read as a cumulative set of orientations rather than a standalone list.

Table 5. Orientations Emerging from Our Dialogues

Orientation	What this orientation invites us to notice
Movement of energy	The spread of ideas, shifts in discourse, and subtle changes in norms and consciousness beyond visible participation or events.
Collective as home	Relational depth, care, belonging, and emotional infrastructure that sustain collective life beyond formal structures or outputs.
Prevention of regressive change	Invisible or indirect impacts, such as blocking harmful policies, sustaining resistance narratives, and constraining future regressions.
Beyond funds and activities	The circulation of values, commitment, and shared purpose that cannot be reduced to budgets, deliverables, or activity metrics.
Nonlinearity	Cycles of surge, pause, and return; the significance of setbacks, dormancy, and iterative progress in collective journeys.
Intersectional change	How change unfolds across interconnected systems of power, including who benefits, who is excluded, and unintended consequences.
Reflexivity in measurement	The influence of positionality, power, and perspective on what is measured, and the need for critical self-awareness in evaluation.

1. Measuring the Movement of Energy: The life of a collective is captured not merely in numbers or events, but in the movement of energy and the spread of ideas it sets in motion. Like waves, where the water circulates but a leaf on the surface may remain in place, the visible participants are not the only carriers of change. What endures is the energy (the disturbances, ripples, and the சிந்தனை [Sindhanai] that unsettle dominant structures) and the philosophy this energy carries forward. Ideas of justice, dignity, and rights seep into everyday conversations, shape how communities imagine their futures, and slowly shift norms about whose

voice is heard and whose authority matters. These processes are rarely linear or easily quantifiable, yet they constitute the deepest impact of collective action. Evaluation, then, must learn to trace these subtle but transformative ripples: how debates are reframed, how silences are broken, and how the terms of social and political engagement begin to shift.

2. Measuring the Collective as Home: Movements are sustained not only by structures (or “houses”) but also by the affective and relational bonds that make a collective feel like a

“home.” Traditional measurement frameworks focus on tangible outputs (for example, meetings held, events organized, or policies influenced), but such metrics cannot capture the emotional and political infrastructure that keeps a collective alive. The sense of ownership, the bonds formed, the rituals of care, and the intergenerational continuity all constitute the collective’s home. Capturing these dimensions requires evaluators to value process and relational depth alongside formal outcomes.

3. Measuring the Prevention of Regressive Change:

Often the most important victories of movements are invisible: blocking harmful policies, slowing down exclusionary reforms, or keeping alive narratives of refusal. Unlike interventions that generate visible outputs, this preventive work often is invisible, is iterative, and requires imagination to trace. Even when efforts do not fully succeed, they create narratives of refusal that persist in public discourse and constrain future attempts at regression. Measurement must therefore capture the subtle, indirect, and long-term effects of resistance, acknowledging that prevention itself constitutes progress.

4. Beyond Funds and Activities: Funding matters, but movements cannot be reduced to budgets or deliverables. Such metrics risk missing the essence of collectivization, which blends the personal with the organizational and the intimate with the political. Movements are sustained not by funding lines but by the cause itself, and by how it percolates into the daily lives and consciousness of participants. Measurement approaches must prioritize this deeper circulation of commitment, values, and shared purpose rather than treating financial or procedural outputs as proxies for impact.

5. Measuring Nonlinearity: Collectives rarely move in straight lines. Collectives surge, recede, pause, and return, often appearing dormant before re-emerging with renewed strength, reflecting the inherent nonlinearity in social change. Conventional metrics of success and failure obscure this rhythm. Measurement must be designed to accommodate discontinuities, reversals, and iterative progress, recognizing that apparent setbacks may seed future growth and that temporal pauses are often necessary for reflection and consolidation.

6. Measuring Intersectional Change: Collectives navigate multiple, interlocking

systems of oppression simultaneously. Measurement frameworks that track progress against a single axis of struggle risk missing regressions elsewhere—or masking who benefits and who is left behind. Measuring intersectional change requires evaluation to ask not only what a collective has achieved, but how its strategies have reverberated across entangled systems of power: whether gains in one domain have been accompanied by inadvertent reinforcements of another; and whether the full diversity of the collective’s membership is reflected in what is counted as progress.

7. Reflexivity in Measurement:

Measurement is never neutral. Who measures, for whom, and from where, profoundly shapes what is observed, recorded, and interpreted. Who measures, from which standpoint, and with what interests in mind determines the lens through which data are filtered. Reflexivity (critical awareness of one’s own positionality) is as essential as methodological rigor. Measurement frameworks must therefore include space for introspection, ensuring that assessments do not inadvertently erase or distort the very experiences they aim to document. Without it, evaluations risk reproducing the very hierarchies movements are resisting.

A note on conventional frameworks:

Traditional M&E frameworks, particularly those shaped by neoliberal logics, emphasize individualized outcomes, atomizing collective effort into measurable units (Chaplowe, 2023; Woodhill et al., 2005). This risks hollowing out solidarity, turning collectives into aggregations of personal achievements rather than shared struggle. Effective measurement must therefore maintain the inseparability of individual and collective agency, valuing relational, political, and philosophical impacts alongside conventional outputs. This does not necessarily mean abandoning conventional frameworks entirely; it means holding them accountable to the collective realities they are supposed to serve, and resisting their tendency to become ends in themselves.

Reframing measurement in these ways is not about abandoning rigor (Chambers, 2015). It is about shifting the center of gravity—from funder accountability to collective vitality, from outputs to processes, from compliance to transformation. Unless evaluation changes, it risks hollowing out solidarity and reducing collectives to projects. But if it evolves—by recognizing energy, home, prevention, philosophy, intersectionality, and

reflexivity—it can become a companion to struggle: a mirror and a compass that collectives themselves can use to navigate their futures.

Conclusion: Mainstreaming Collective-Centered Evaluation

While this framing emerges from social movement practice, its ambition is broader: to reimagine how evaluation is conceived and practiced globally. At stake is more than methodology; it is about whose knowledge counts, whose experiences are made visible, and whose visions shape the criteria for change. Conventional evaluation has too often imposed external logics, priorities and metrics on collectives. What we propose instead is a shift toward collective-centered approaches that foreground lived experience, relational energy, and the subtle but enduring work of resisting regressive change.

The Three Horizons framework, as also used in the International Evaluation Academy's Transforming Evaluation initiative (Ofir et al., this issue), helps illustrate this trajectory. Horizon 1 is marked by linear, output-focused, externally driven evaluation, where donor metrics dominate. Horizon 2 represents transitional practices, integrating reflexivity and context-sensitive indicators but still tethered to conventional frames. Horizon 3 points toward a transformative possibility: collective-centered evaluation that measures what has long been overlooked—energy, philosophy, solidarity, and systemic ripple effects. In doing so, evaluation itself becomes a way of amplifying the voices and agency of those historically excluded, making visible the subtle, relational, and philosophical dimensions of social change.

Achieving Horizon 3 requires returning to deeper intellectual traditions. Evaluation, as it became an industry, drew heavily on colonizing frameworks and Northern epistemologies that claimed universality while erasing other ways of knowing. Rebuilding requires returning to, and building from, intellectual genealogies that have long grappled with oppression and transformation (for instance, Ambedkar, Fanon, hooks, and a wide array of feminist, Indigenous, and postcolonial thinkers). These traditions challenge not only how knowledge is produced, but also what is deemed measurable, valuable, and legitimate, offering pathways for reimagining power, collective agency, and evaluation itself in ways that resist reductionism and uphold plural ways of knowing.

Rerooting evaluation in these thought traditions is not an academic exercise alone; it is a political and ethical necessity. Only by drawing from these wells of thought, and from the lived practices of collectives themselves, can evaluation contribute meaningfully to the transformational imperative of our times.

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