



Innoweave

Practical Tools for Social Innovation

Impact and Strategic Clarity Module: Overview

November, 2013



Innoweave's Impact and Strategic Clarity program was developed by The Bridgespan Group

“The Bridgespan Group collaborates with mission-driven leaders and organizations to accelerate breakthrough social impact. A nonprofit ourselves, we share our clients’ passion for building a better world.”

- **History:** Founded in 2000
- **Services:** Strategy consulting, executive search, leadership development, philanthropy advising, and developing and sharing insights
- **Offices:** Boston, New York, and San Francisco (~200 staff)
- **Clients:** 400+ foundations and nonprofits globally



Overview of the Innoweave Impact and Strategic Clarity module

- The *Impact and Strategic Clarity* module helps non-profit organizations and their leaders examine their current efforts and gain greater clarity on:
 - What impact they aim to achieve
 - How they will achieve it
 - How they will measure their success

Twenty-seven organizations in cohorts 1 and 2
have completed the module.
9 more are underway in cohort 3.



Participants to Date

Cohort 1: Fall/Winter 2012-13

- Blue Door Shelters
- Causeway Work Centre
- Community Living Kawartha Lakes
- Equitas, International Centre for Human Rights Education
- Evergreen
- FarmStart
- Girls Action Foundation
- Heartwood Centre for Community Youth Development
- John Howard Society of Hamilton, Burlington and Area
- Motivate Canada
- Pathways for Children, Youth and Families of York Region
- Pembina Institute
- Santropol Roulant
- Women's Centre of York Region

Cohort 2: Spring/Summer 2013

- Burnaby Association for Community Inclusion
- Canadian Institute for Advanced Research
- Communautique
- Elizabeth Fry Society of Greater Vancouver
- Hospice Georgina
- Law in Action Within Schools Program
- North York Community House
- Oak Park Neighbourhood Centre
- Wapikoni Mobile
- YMCA Canada
- YMCA Kingston
- YMCA Southwestern Ontario
- YOUCAN Youth Services

Cohort 3: (to date) Fall/Winter 2013-14

- Centre for Social Innovation
- Counselling Foundation of Canada
- Furniture Bank
- Jeanne Sauvé Foundation
- LiveWorkPlay
- MATCH International
- North York Community House
- Ottawa Community Immigrant Settlement Organization (OCISO)
- Pour 3 Points
- YWCA Montreal

See innoweave.ca/



Bridgespan has deep expertise in helping nonprofit leaders navigate the tough decisions they face every day

*Next year, we expect a **25% cut** in government funding, how do we prioritize?*

*As we grow, should we **expand all of our programs at the same rate** or grow some faster than others?*

*A possible new grant would require us to **expand to a specific new community**, should we accept the funding? Is this a good location for our work?*

*We want to **increase our impact** without increasing our budget, where should we focus?*

The Impact and Strategic Clarity module offers strategic services to groups of nonprofits in a structured way

Nonprofits execute the work, with extensive **facilitation by coaches**

Supported by a **rigorous process** and tools, with **customized coaching and advice**

Each nonprofit **crafts its own plan** but shares a common experience

Results

A clear plan



Increased skills



Strong peer connections



The Impact and Strategic Clarity program spans six months, organized into two phases of work



- Draft intended impact statement and theory of change
- Conduct research to test draft
 - Internal program analysis
 - External evidence research

- Refine intended impact and theory of change
- Create learning agenda
- Determine implications for programs and operations, develop implementation plan

Bi-weekly coaching calls/meetings
(1 hour) with Innoweave Coaches

In the Impact and Strategic Clarity program, the first step is to draft your Intended Impact statement and Theory of Change



Intended Impact:

What is the impact that you will **hold yourself accountable for achieving**, in what timeframe?



Theory of Change:

What activities will you undertake to achieve that impact?

Intended Impact and Theory of Change are the tools we use to achieve strategic clarity



What? For whom?



Intended impact



How?



Theory of change



To pressure-test your drafts, you will perform two types of analysis in Phase 1

Internal program analysis



- Examine your programs to see how well you are currently performing against your draft intended impact statement and theory of change
 - Are you serving your intended beneficiary group?
 - Are they receiving the intended services in the right ways?
 - Who is (and is not) achieving the desired outcomes, and why?

External evidence research



- Examine the external evidence base in your issue area to draw implications for your draft intended impact statement and theory of change
 - What do experts in your field think about your emerging intended impact statement and theory of change?
 - What interventions have been proven to work in your field?
 - What assessments and outcome measures should you use?

After refining your Intended Impact statement and Theory of Change, you will draw implications of what you have learned for your programs and operations in Phase 2

Determine changes needed



- Given what you have learned, what changes do you need to make to your programs or operations?

Map out an implementation plan



- How will you make those changes?
- What are the financial implications, and how will you sequence changes?
- Who will lead each change effort?

Create a learning agenda



- What questions are still outstanding?
 - Program data wasn't available
 - External evidence was insufficient
- Over the next 3-5 years, how will you answer those questions?

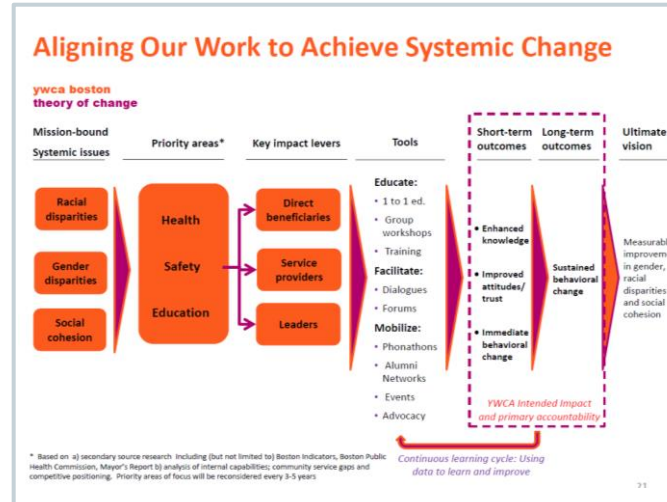
Participants will end the process with a clear impact statement and theory of change, and an implementation plan

Intended impact and measures

Outcome Measures by Public Health Sector and YW Program

	Participant Outcome	Program
System Beneficiaries	Knowledge 75% of participants demonstrate increased knowledge of positive health behaviors	H&W
	Attitudes 10% of participants demonstrate increased trust of medical system	H&W, CD
	Behaviors 10% will participate in a new civic activity	CD
	600 women will get annual breast screenings	H&W
	200 women will perform their monthly self breast exam	H&W
	25% of H&W participants will increase their weekly physical activity	H&W
	25% will meet self-set nutrition improvement goals	H&W

Theory of change



Implementation plan

HealthApp

Updated: 12/23/2010

■ - Timing of specific steps
■ - Milestone of deliverable (product, output, achievement of target)
■ - Milestone of a decision being made

Major action	Specific activities, milestones	Lead Responsible	Staff / team involved	Year 1													
				Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec		
	Raise funding for new program	CEO	Director of Dev														
	Deliver draft for review, feedback	YP-Programs	Mngmt team			X											
	Incorporate feedback, revise program/curriculum	YP-Programs	Mngmt team														
	Milestone: design and curriculum approved	YP-Programs	Mngmt team					X									
	Begin recruitment of new program director	YP - HR	Mngmt team														
	Complete hire (pending funding)	YP-HR	Mngmt team													X	
	Pilot program at Site X	Program Director	Site Staff														
	Milestone: 100 participants enrolled at pilot site	YP programs	Program Director, Site Staff														X

Learning agenda

Our learning agenda

	Key learning agenda questions	Relevant metrics
Our program model	<ul style="list-style-type: none"> What are the pre-existing conditions (across education, housing, support services, etc) necessary to implement our approach? What are the best types of communities to target? 	<ul style="list-style-type: none"> Comparative community level inputs, outputs
Our funding model	<ul style="list-style-type: none"> What are the most important sources of funding for our four programs? What are the most important partnerships to secure funding? 	<ul style="list-style-type: none"> Amount and type of financing, by source Amount and type of funding for peer organizations, by source
Our capacity	<ul style="list-style-type: none"> What is the most efficient team structure to support lead organizations? 	<ul style="list-style-type: none"> Staff capacity and utilization Inputs, outputs and outcome metrics for lead organizations

Previous Group Consulting participants highlight two major benefits

A disciplined plan

*“It provided us with a structure for something we needed to do but didn’t know how to do. We can see the **direct link between the plan and our future path**. We **never would have been able to do this on our own**.”*

*“This process allowed our organization to **clearly articulate and plan** what was before just vague desires.”*

*“[Planning] **pushed us to make decisions** and have conversations that **we have avoided in the past** out of fear they would be too controversial.”*

*“The process helped us **identify and articulate goals and success measures**.”*

Clarity, alignment and stronger internal capacity

*“This was an incredibly helpful process. It has helped to **build capacity on [our] staff and board** and has **provided a clear plan** for our future direction.”*

*“Internally, [planning] brings **clarity to our work** with the staff, and more buy-in.”*

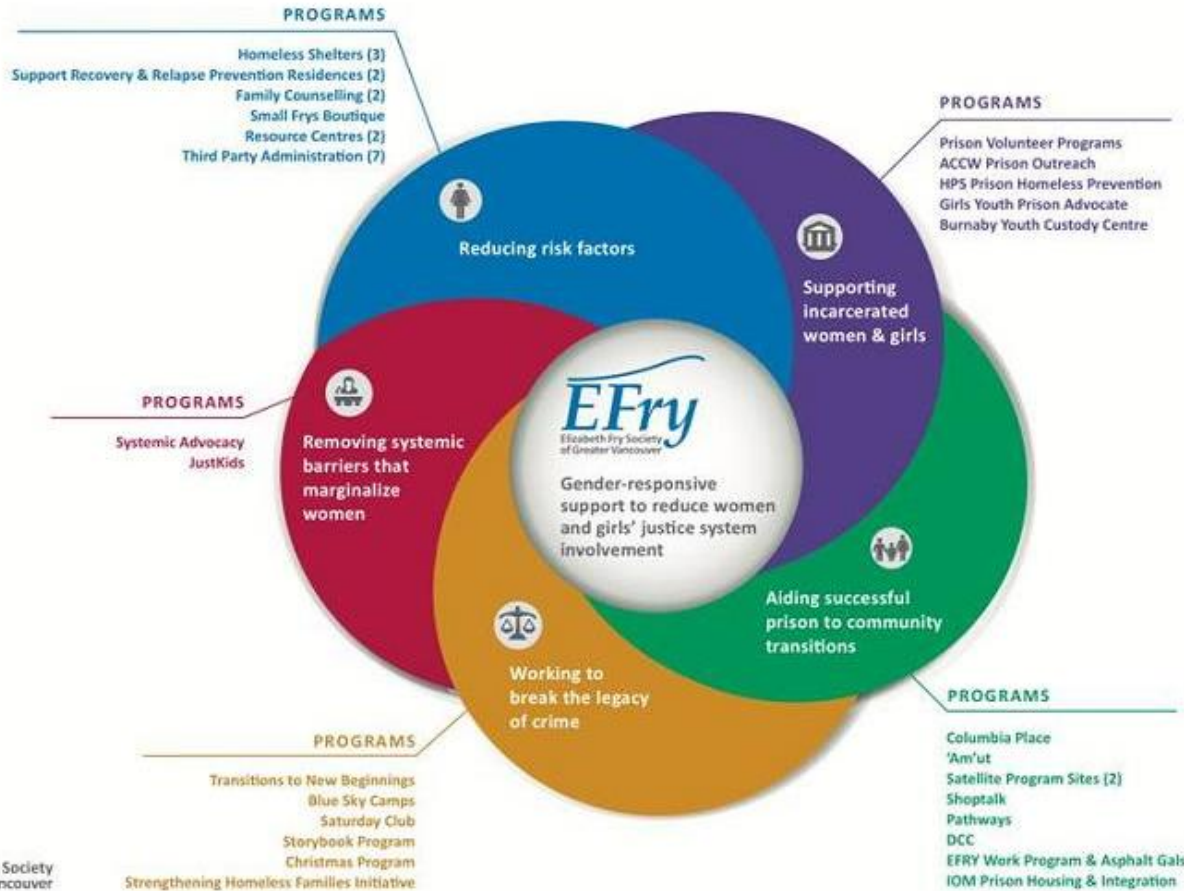
*“The process built **capacity among our staff** and **commitment among Board members**.”*



Elizabeth Fry Society of Greater Vancouver: EFry

How We Do It

Individual women are willing and able to take responsibility for their own lives if provided with the opportunity, choice and skills to do so. Our five strategies support individual women and marginalized women in general in taking responsibility.



Success in this project requires your team's full dedication

Analytical rigour



Stakeholder
involvement



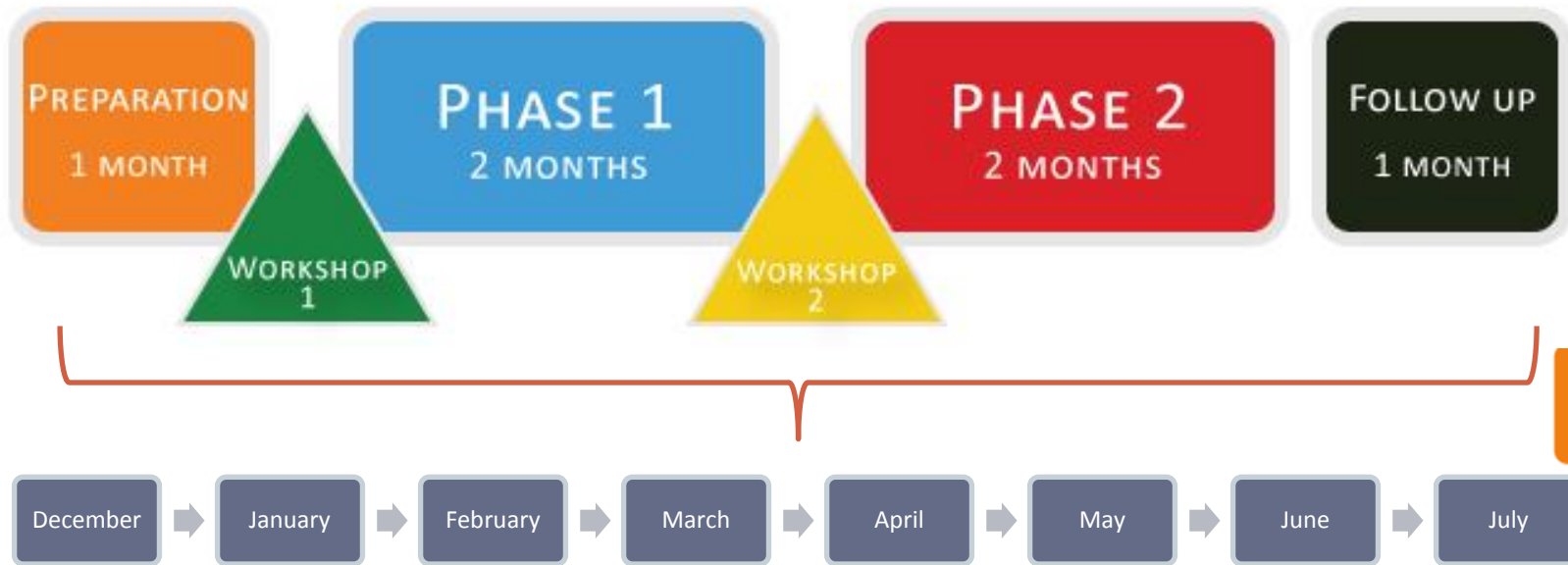
Teamwork



Innoweave coaching and support



Cohorts 3 and 4: Flexibility in Start Dates



Halton Region Grant Applications December 5

Innoweave Grant Applications January 6

Space is limited and organizations are asked to apply by completing an application by January 6, 2014

Is this program right for us?

- Participating organizations should be ready to reflect on their activities and desired impact.
- Ideally, this should not be done at the same time as other major planning processes (e.g., Board strategic reviews, revision of fundraising strategies).
- Participating organizations must be ready to dedicate a small project team and invest an average of one day per week in staff time over five months to the program. Active engagement by CEO/Executive Director and the senior leadership team (one of whom will serve as project leader) is required, and some Board involvement is expected.
- The value of this module, which includes development costs, research materials, proprietary tools, admin support and coaching, is \$25,000. The cost of the module is \$12,500. In the application, organizations are asked about their ability to pay this cost. Subsidies are available to qualifying organizations.

Space is limited and organizations are asked to apply by completing an application by January 6, 2014

How do I learn more?

Visit www.innoweave.ca/modules/impact-and-strategic-clarity
or email info@innoweave.ca

Sally Fazal
905-617-2691
sfazal@peleeconsulting.com

Lynn Fergusson
905-681-9710
lfergusson@2H2M.ca

How do I apply?

Visit Innoweave.ca to complete the short application by January 6, 2014

Questions?

