



Impact and Strategic Clarity Planning: Overview

Webinar
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Collaborating to accelerate social impact

THE J.W. McCONNELL
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The Impact and Strategic Planning process will be supported 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

We have developed 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?

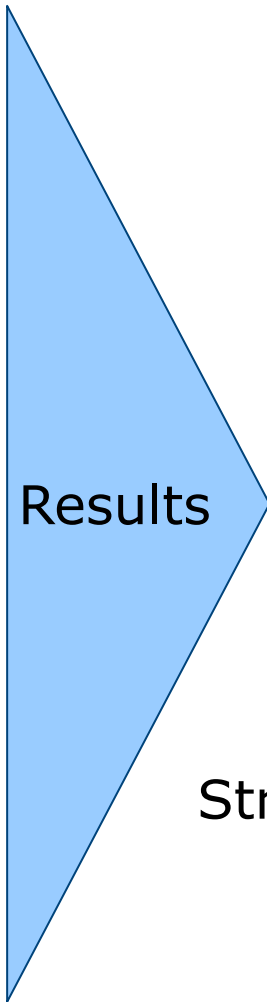
We want to **increase our impact** without increasing our budget, where should we focus?

Group Consulting offers Bridgespan's strategic services to groups of nonprofits in a structured way

Nonprofits execute the work,
with extensive **Bridgespan**
facilitation

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

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



A clear plan



Increased skills



Strong peer connections



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**."*

Overview of the Innoweave Impact and Strategic Clarity project



- Innoweave aims to provide community sector leaders with new tools and processes to effect large-scale change
- This project will help 10-14 nonprofit organizations to examine their current efforts in a structured and data-driven way:
 - What impact they aim to achieve
 - How they will achieve it
 - How they will measure their success

The project itself will span six months, with two phases of work



- Create draft theory of change
- Conduct research to test theory
 - Program analysis
 - External evidence

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

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?

To pressure-test your draft, in phase one participants will perform two types of detailed analysis

Program analysis



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

Evidence research



- Research the external evidence base in your issue area to see what implications that research has for your draft theory of change
 - What do leading experts in your field think about your emerging impact statement and theory of change?
 - What interventions have been proven to work in your field?
 - What assessments and outcome measures should you use?

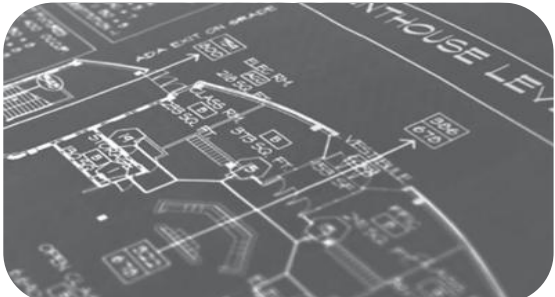
In phase two, each organization will determine implications of what they have found for their programs and operations

Determine changes needed



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

Map out a 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?

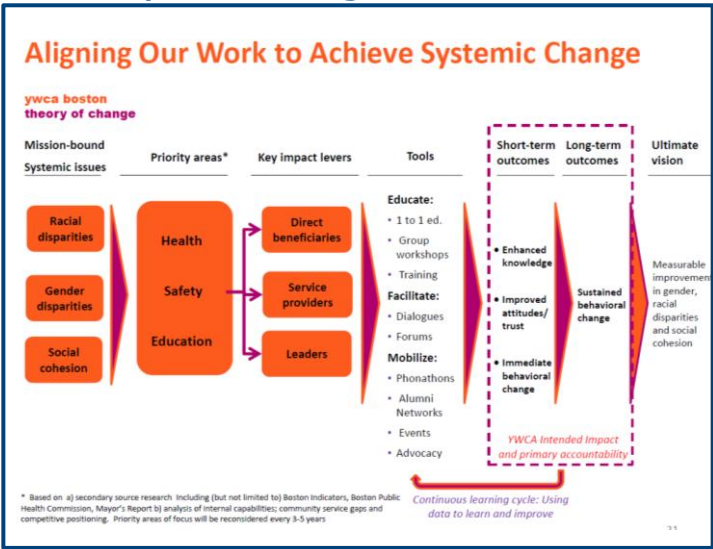
Participants will end the process with a clear impact statement and theory of change, and an implementation plan

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
■ X = Milestone of deliverable (product, output, achievement of target)
■ X = 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		VP-Programs	Mngmt team				X										
Incorporate feedback, revise program/curriculum		VP-Programs	Mngmt team														
Milestone: design and curriculum approved		VP-Programs	Mngmt team					X									
Begin recruitment of new program director		VP - HR	Mngmt team														
Complete hire (pending funding)		VP-HR	Mngmt team													X	
Pilot program at Site X		Program Director	Site Staff														
Milestone: 100 participants enrolled at pilot site		VP 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

Success in this project requires your team's full dedication

Analytical rigor



Stakeholder involvement

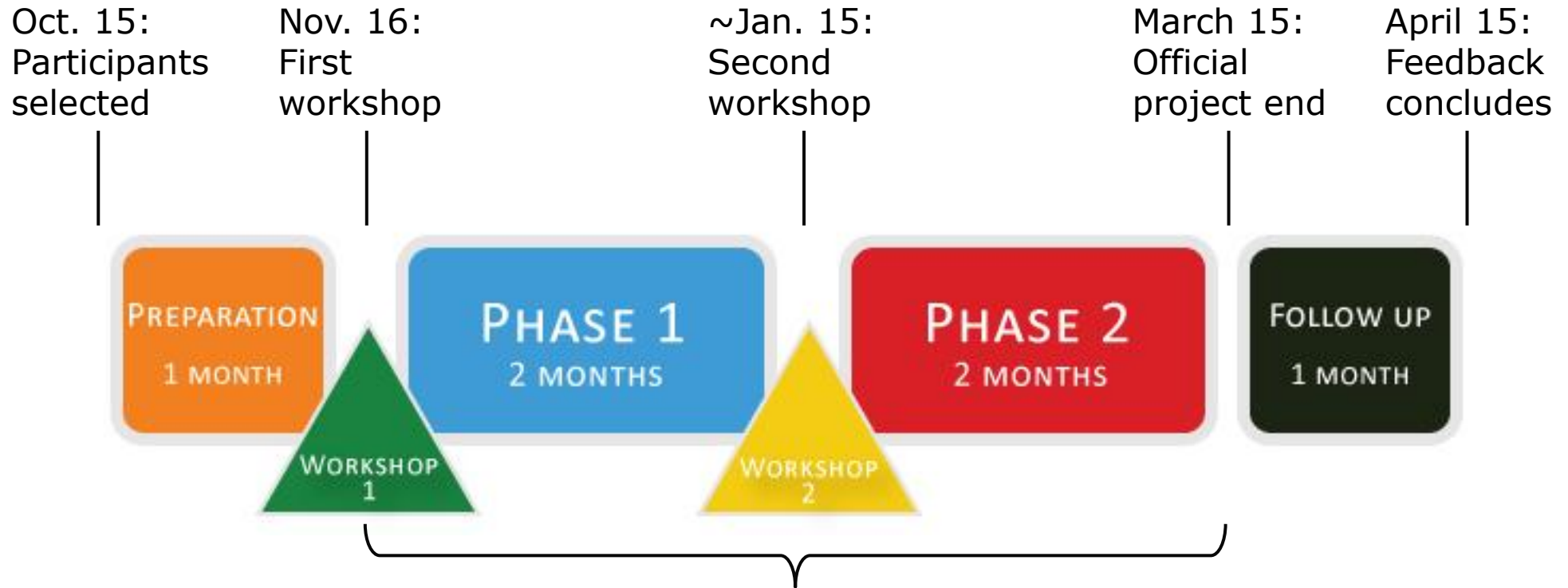


Teamwork



Bridgespan and Innoweave coaching and support

Participants will be selected by Oct. 15, and the project will kick off on Friday, Nov. 16



- Coaching calls with Bridgespan and Innoweave every other week (1 hour)
 - Feedback on analysis thus far; review drafts
 - Talk through questions
 - Plan stakeholder engagement
 - Coaching on next steps

Questions?

