Strategy & Impact
January 22, 2021

SOCIAL **IMPACT** ARCHITECTS
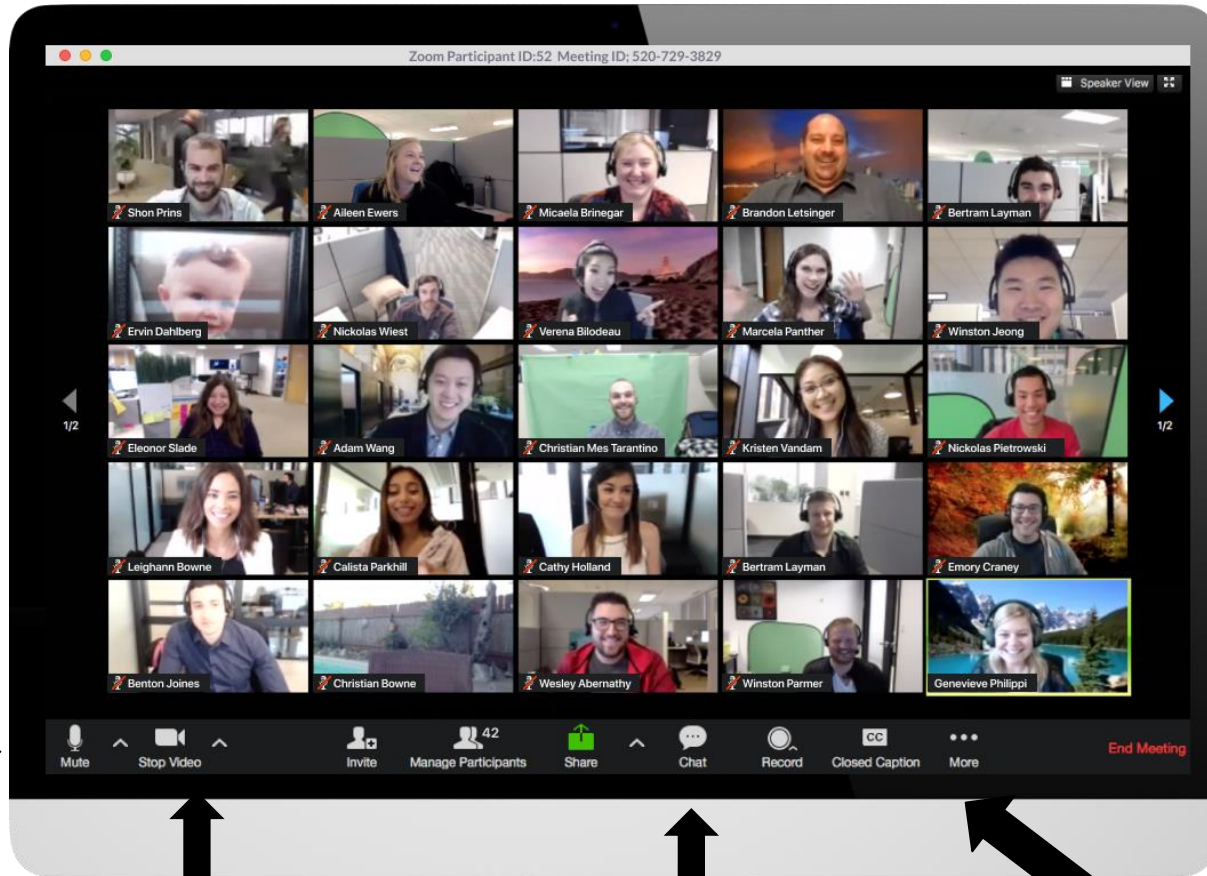
SUZANNE SMITH, MBA
suzanne@socialimpactarchitects.com

SocialImpactArchitects @snstexas @socialtrendspot socialimpactarchitects.com/blog

Toggle
Mute/
Mute Off

Toggle Start
Video/
Stop Video

**Chat for
Questions**

Toggle Closed
Caption

SOCIAL **IMPACT** ARCHITECTS
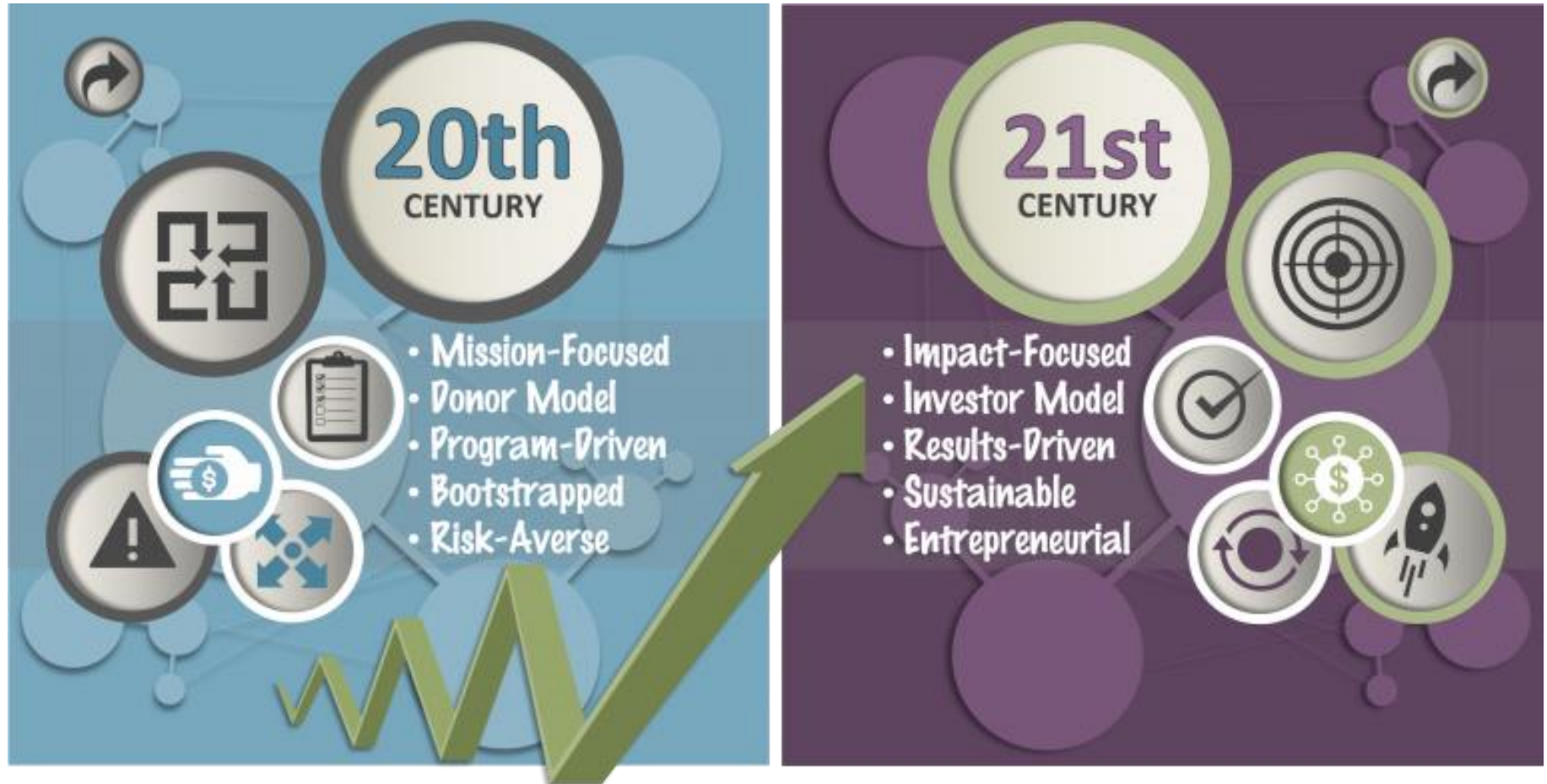
Action Planning

Sample

Action Plan

VISION
To see the systemic problems of LGBTQ youth homelessness radically changed.

MISSION
To reduce and prevent LGBTQ youth experiencing homelessness in Dallas and its surrounding counties.

IMPACT

Public Policy
Continue to engage as a subject matter expert in public policy discussions at the local and state level

Faith
Continue efforts of Faith-based Team to share Outlast Youth's resource guides

Interagency
Continue partnership efforts with area nonprofits and government agencies to educate and train them on the unique experiences of LGBTQ youth

OPERATIONS

- Create agreed-upon job description and performance goals for Executive Director
- Review and refine HR policies to align with best practices
- Update values to support new strategic direction
- Ensure regular tracking of all stakeholders through connected online database

REVENUE

- Upgrade financial process for real-time reporting and reconciliation to board and staff
- Decide on a reserve policy of at least X months of operating capital and develop a plan to achieve it
- Develop a scenario-based budget for 2021
- Create fundraising plan for 2021 with diverse funding streams
- Shift to a culture of philanthropy to support relationship-building as key to revenue growth for both private and public sources

GOVERNANCE

- Review and track board composition to reflect diversity of community
- Develop a board schedule for 2021
- Continue to refine board meetings to be action-oriented
- Engage in purposeful governance and be accountable to organizational goals through a shared dashboard
- Participate in succession planning for both board and staff to support the organization's long-term sustainability

BRAND

- Grow brand awareness and equity to support goals and foster positive relationships
- Continue efforts to improve website and social media presence through posts and videos
- Consider the development of a tagline to better illustrate Outlast Youth's unique value proposition
- Consider a regular newsletter to keep stakeholders engaged in the mission
- Develop collateral materials to support storytelling efforts

Shifts in Social Sector

Nonprofit Shifts

SOCIAL **IMPACT** ARCHITECTS

Shift from Individual to Ecosystem

How to Think About The Future

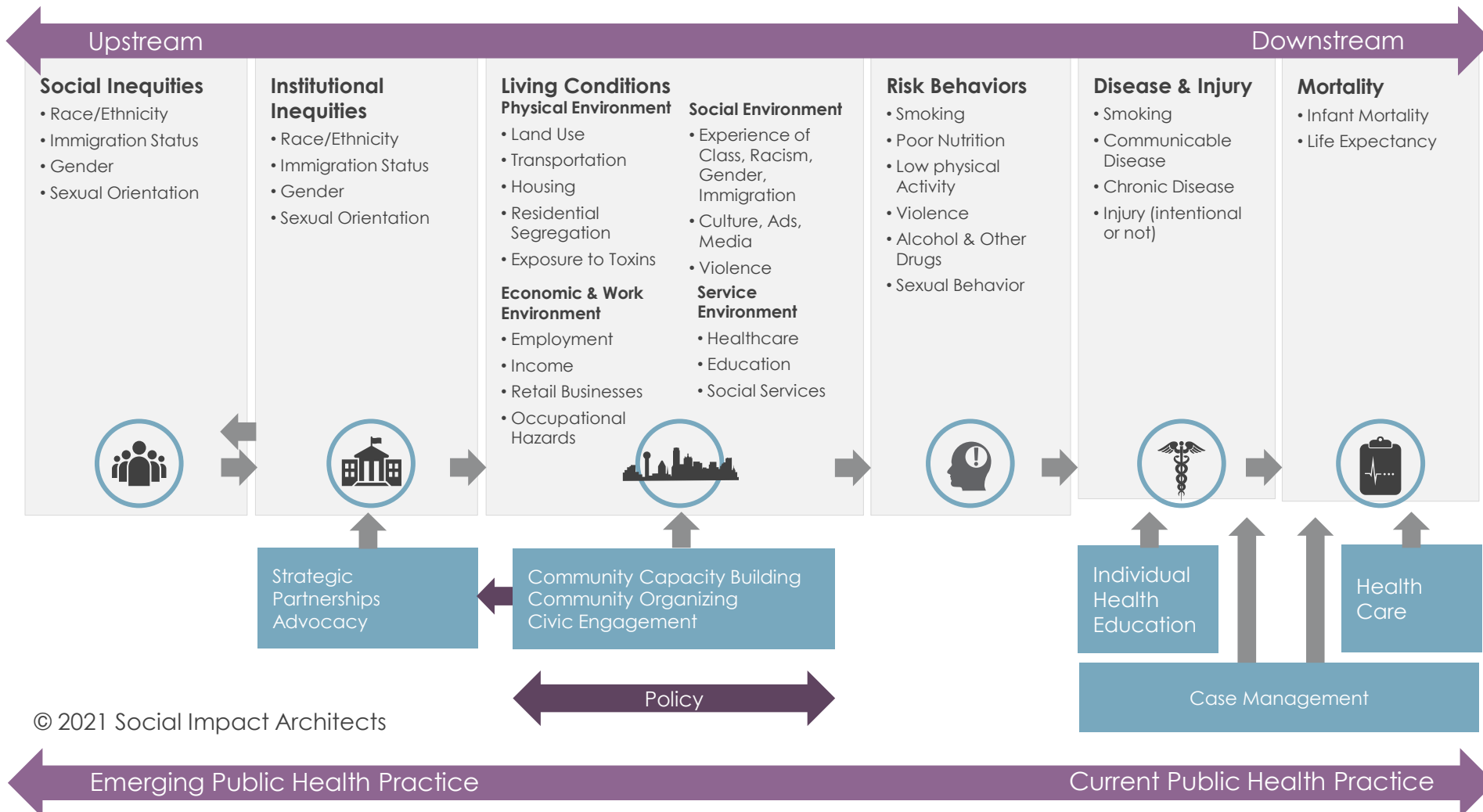**Individual Effort**

Collaboration

System Change

SOCIAL IMPACT ARCHITECTS
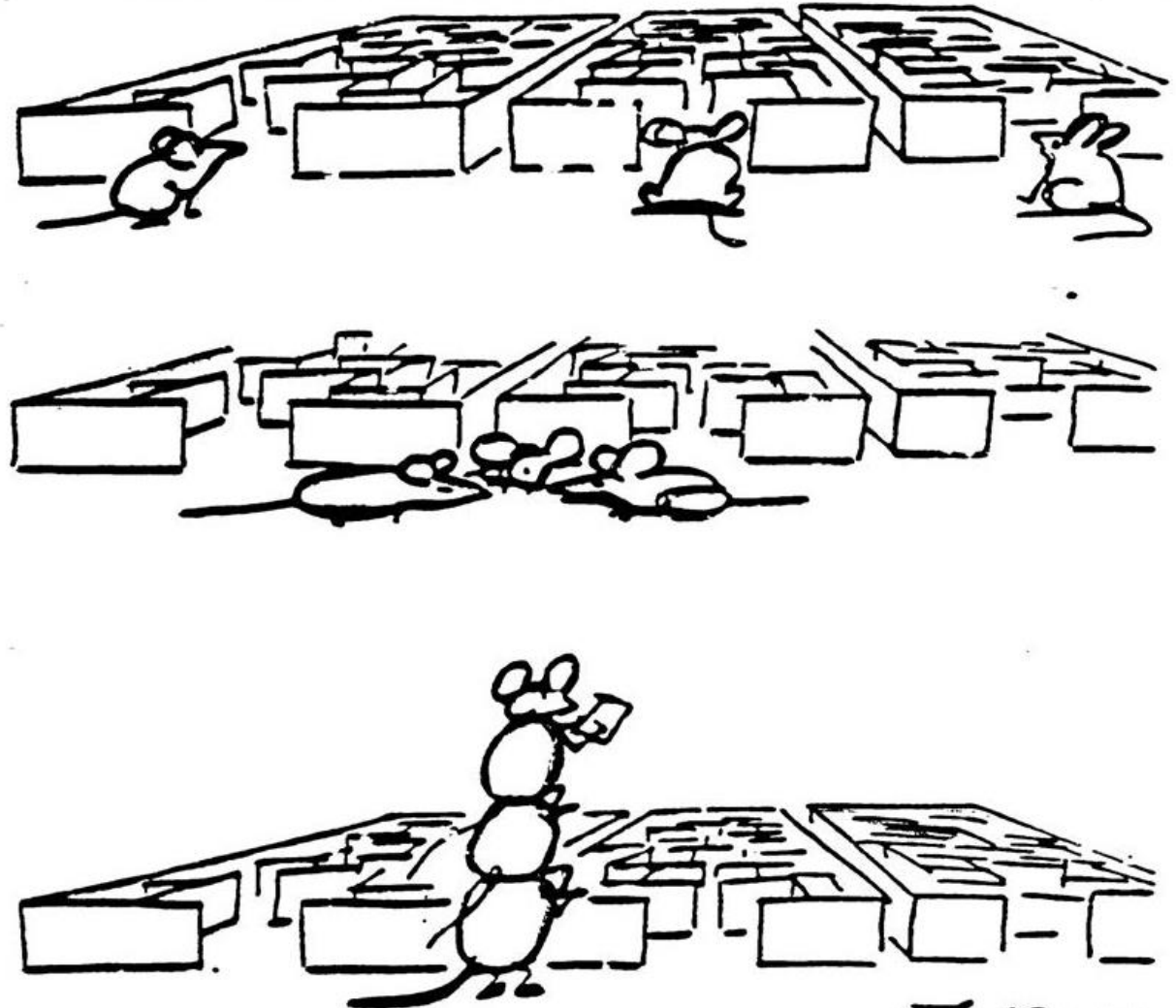
Moving Upstream
Focused on Individuals as a Function of Systems
A Public Health Framework for Reducing Health Inequities

Upstream ⟶ Downstream

Social Inequities
- Race/Ethnicity
- Immigration Status
- Gender
- Sexual Orientation

Institutional Inequities
- Race/Ethnicity
- Immigration Status
- Gender
- Sexual Orientation

Living Conditions
Physical Environment
- Land Use
- Transportation
- Housing
- Residential Segregation
- Exposure to Toxins

Economic & Work Environment
- Employment
- Income
- Retail Businesses
- Occupational Hazards

Social Environment
- Experience of Class, Racism, Gender, Immigration
- Culture, Ads, Media
- Violence

Service Environment
- Healthcare
- Education
- Social Services

Risk Behaviors
- Smoking
- Poor Nutrition
- Low physical Activity
- Violence
- Alcohol & Other Drugs
- Sexual Behavior

Disease & Injury
- Smoking
- Communicable Disease
- Chronic Disease
- Injury (intentional or not)

Mortality
- Infant Mortality
- Life Expectancy

Strategic Partnerships Advocacy

Community Capacity Building Community Organizing Civic Engagement

Individual Health Education

Health Care

Case Management

Policy

Emerging Public Health Practice ⟶ Current Public Health Practice

© 2021 Social Impact Architects

Shifts due to COVID-19?

SOCIAL **IMPACT** ARCHITECTS

COVID-19 Articles

Social trendSpotter
Latest Trends in the Social Sector

- ■ Q&A on COVID-19
  - • https://socialimpactarchitects.com/covid-19/
- ■ Etiquette for Effective and Enjoyable Online Meetings
  - • https://socialimpactarchitects.com/online-etiquette/
- ■ Keeping Nonprofit Volunteers Engaged During COVID-19
  - • https://socialimpactarchitects.com/nonprofit-volunteers-covid-19/
- ■ 5 Tips for Corporate Sponsorship in the Face of COVID-19
  - • https://socialimpactarchitects.com/corporate-sponsorship/
- ■ Hoping for the Best While Preparing for the Worst
  - • https://socialimpactarchitects.com/nonprofit-security/
- ■ Do's and Don'ts of Remote Leadership
  - • https://socialimpactarchitects.com/remote-nonprofit-leadership/
- ■ After COVID-19: Top 10 Aspirational Goals for Daring Greatly in the Social Sector
  - • https://socialimpactarchitects.com/aspirational-social-sector-goals/

Buzzwords

SOCIAL IMPACT ARCHITECTS

Sustainability

Organizational Focus Areas

Impact

Brand

Culture

Governance

Operations

Revenue

@socialtrendspot
www.socialimpactarchitects.com

SOCIAL IMPACT ARCHITECTS
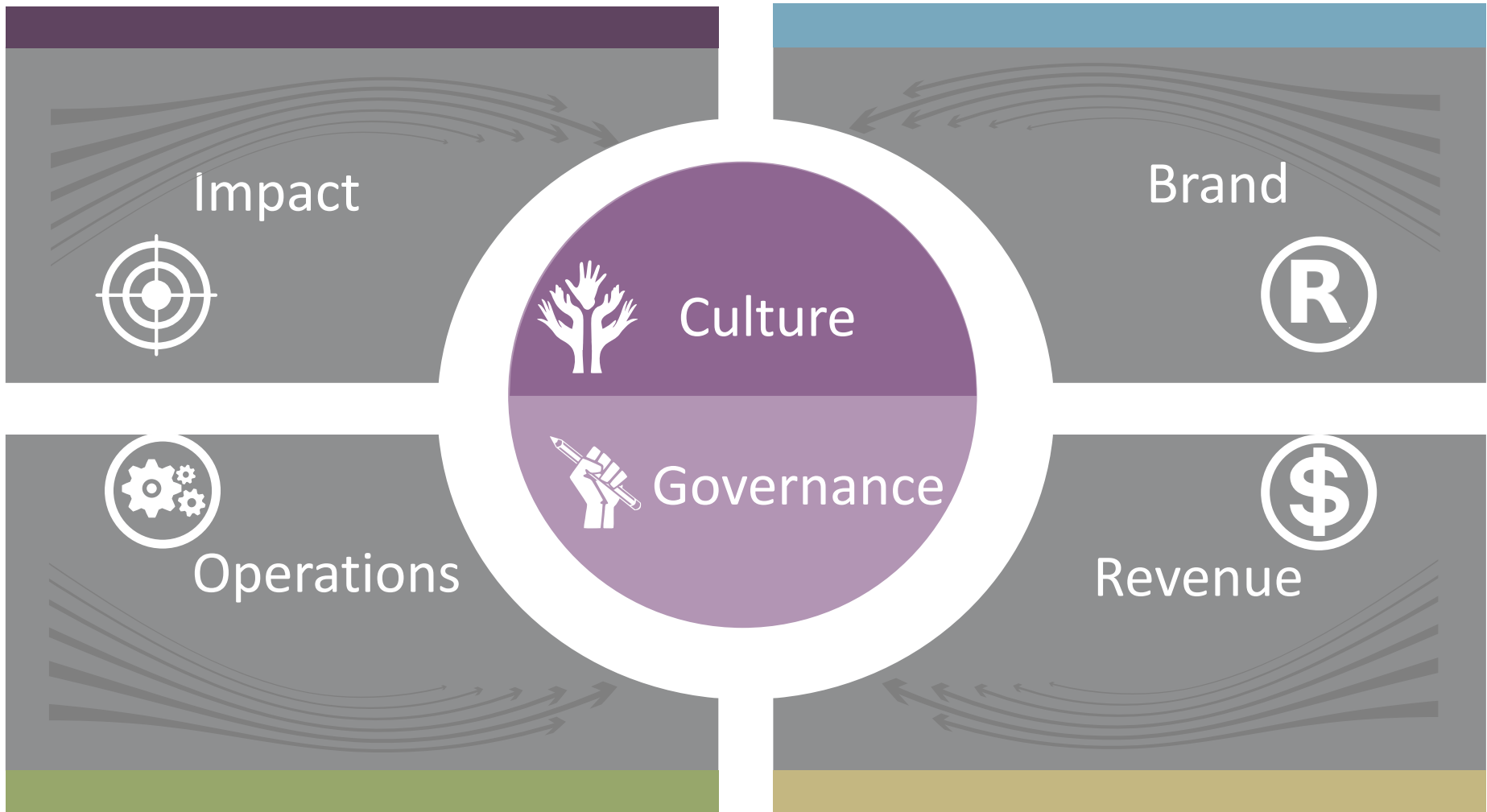
Sustainability
High Performance + High Impact

HIGH-PERFORMANCE NONPROFIT	HIGH-IMPACT NONPROFIT

■ Easy to observe
■ Well-run organization
   • Leadership
   • Clear goals
   • Learning organization
   • Diverse financials
	■ Long-term/usually in retrospect
	■ Organization which has meaningful and sustainable social impact

+

SOCIAL IMPACT ARCHITECTS

Nonprofit Lifecycle

If Decline
Turnaround
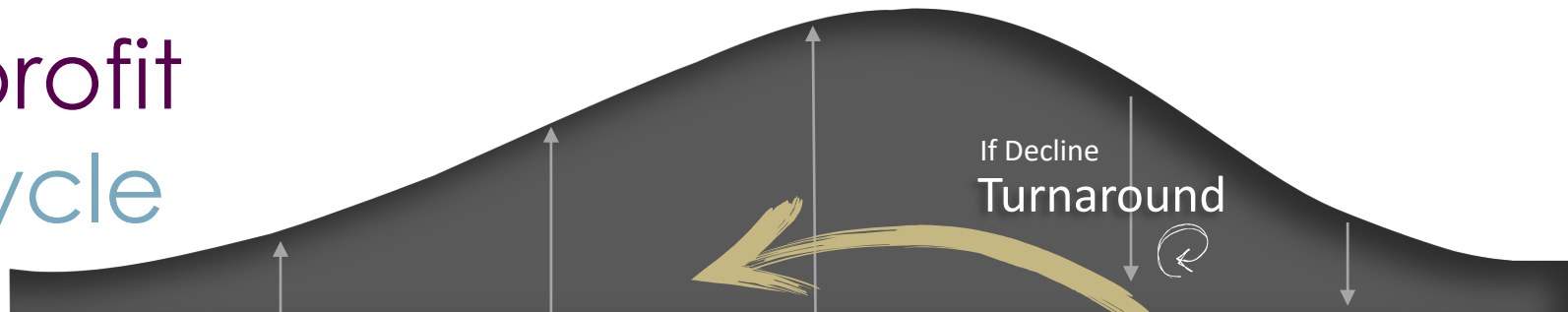
	Idea	Start-up	Growth	Maturity	Decline	Crisis
Impact	Informal – Need established, best practices integrated & pilot launched	Pilot successful – Lessons integrated into design / Measurement starts	Established in marketplace – Strong results, partner-of-choice & consistent delivery	Consistent results through robust evaluation / Focused on continuous improvement, scale & system-building	Need exists, but nonprofit isn't partner-of-choice / Market duplication from other nonprofits	Demand near zero / Intense competition for resources & energy
Governance	Not yet developed	Formal governance starts – Most likely homogeneous group	Board expansion – More diversity with more focus on planning & oversight	Board is more policy- & strategy-focused / Delegates management to Executive Director	Board members hard to recruit, retain & engage / Low focus of strategic issues	Board not fulfilling fiduciary responsibilities
Culture & Operations	Entrepreneurial Founder using volunteer resources for guidance / Culture is defined by Founder	Flat organization – Decisions are likely made by Founder / Volunteers needed for hands-on support / Culture is action-oriented	Founder has hired or becomes Executive Director and is key decision-maker with Board guidance / Increased division of labor & accountability as staff is hired / Culture is results-oriented / Volunteers are used as resources	Leadership is often second or third generation from Founder / Clear division of labor & accountability among staff / Culture is well-defined and serves as a competitive advantage / Volunteers are seen as ambassadors	Increasing turnover of staff & volunteers / Decreased ability to attract top talent / Decreased transparency	Inability to fill key roles / High contention & division among staff / Mistrust of leadership
Revenue	Most are in-kind	Limited financial resources – Lives hand-to-mouth	More diverse financial resources with established relationships with funders, but still unpredictable	High degree of financial diversity with established relationships with multiple funders / Endowment exists / Higher degree of financial predictability	Funders are not renewing contracts and not contacting organization / Low cash reserves / Decreasing donor retention & loyalty	Cash reserves insufficient to cover operating expenses / Long-time donors tapped out
Brand	Not utilized	First official marketing materials – Primary method of marketing is word-of-mouth	Build-out of marketing & communication needs, including public & media relations	Sophisticated marketing & communications plan using multiple channels / Everyone equipped to tell story	Decreased public interest / Issue area not discussed in the media	Unable to attract media or public attention / Messaging does not resonate with public

Example: Outcomes vs. Impact

Inputs	Activities	Outputs	Outcomes	Goal Alignment
What do put in?	What do you do?	What happened	What resulted **Less** What would have happened anyway **Equals** Impact	How aligned is the impact with your organization goal?

	College Graduation Rate	College + Intervention Graduation Rate	Difference
The City University of New York (CUNY)	21%	56%	35%
	What would have happened anyway	**Outcome**	**Impact**

SOCIAL IMPACT ARCHITECTS

Value Proposition

Definition

Value proposition is a simple and clear statement that tells your customers how you serve their needs, what benefits they receive, and why you are better than or different from the competition.

Importance

- Helps your venture differentiate itself
- Needs to be clear, convincing and concise

Unique Value Proposition

What your customer needs and cares about

What you do really well

What your competition does really well

Social Definitions

SOCIAL INNOVATION

Social Innovation is about the IDEA.

And not just any "new idea." For the social sector, social innovation has to be an idea – in the form of a product, service or method – that creates change, performs better than existing solutions and for which the value accrues primarily to society.

SOCIAL ENTREPRENEURSHIP

Social Entrepreneurship is about the MINDSET.

Social entrepreneurs are change agents who are relentless about fashioning bold and creative solutions – through the creation of new organizations or as "intrapreneurs" within existing organizations and communities – to create social change.

SOCIAL ENTERPRISE

Social Enterprise is about the BUSINESS MODEL.

Social enterprise is a business – whether operated by a for-profit or nonprofit – that has a double bottom line of both maximizing social and financial return.

Deep Dive: https://socialimpactarchitects.com/social-definitions/

Collaboration

Two or more organizations…

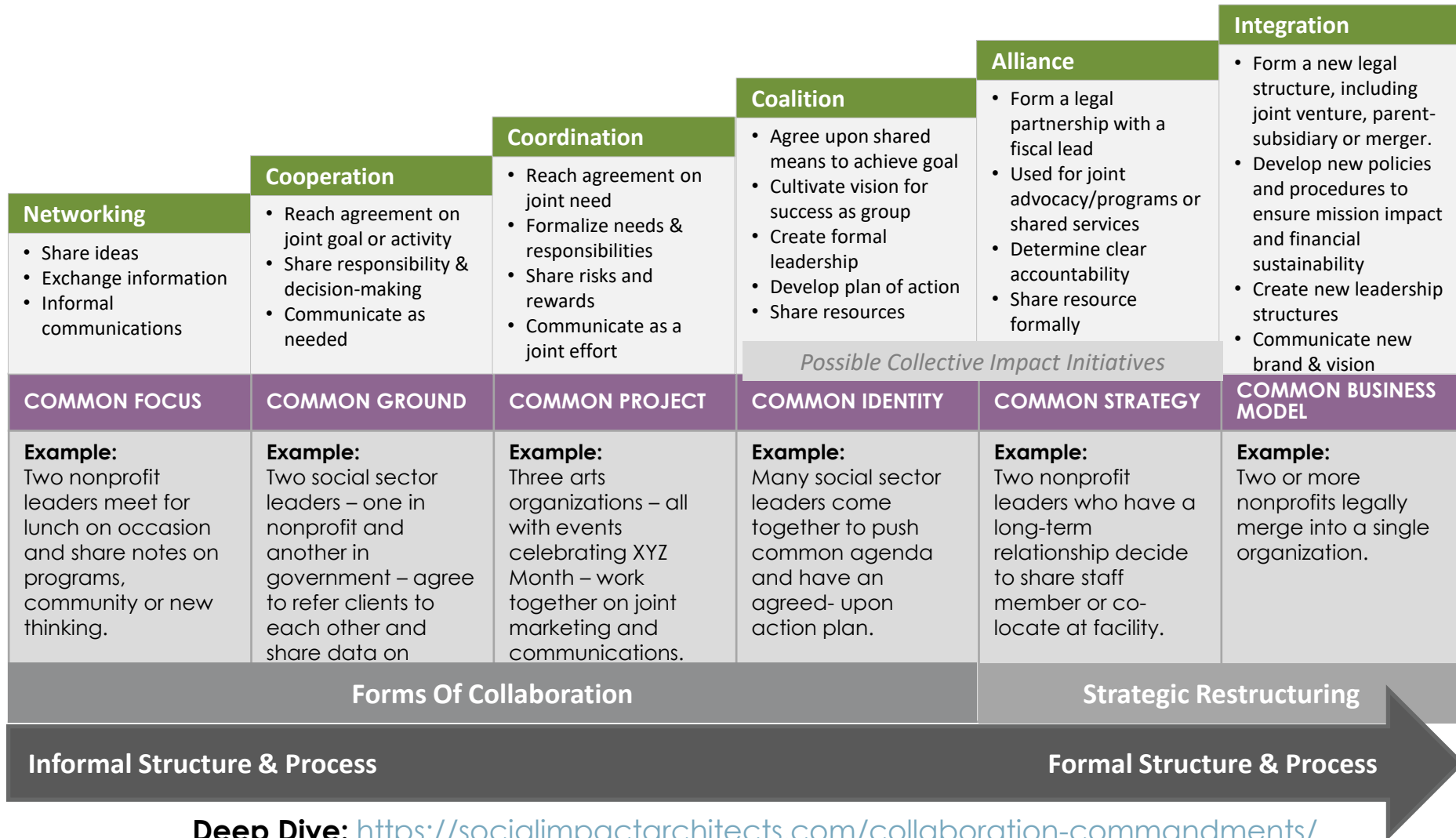working together in a *meaningful, well-defined,* and *deliberate* manner…

by investing *time, energy* and *resources*…

to accomplish a set of *shared objectives*…

that are *mutually beneficial* to advancing the missions of the organizations involved and…

that are *more likely to be achieved* together than alone.

SOCIAL **IMPACT** ARCHITECTS
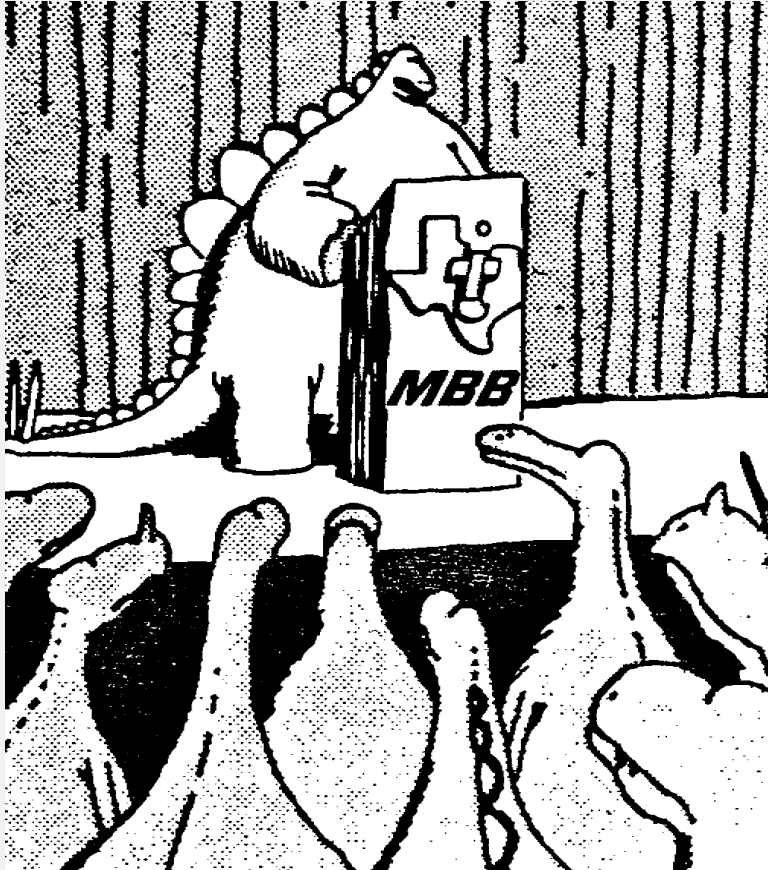
Collaboration Continuum

					Integration
					• Form a new legal structure, including joint venture, parent-subsidiary or merger. • Develop new policies and procedures to ensure mission impact and financial sustainability • Create new leadership structures • Communicate new brand & vision
				Alliance	
				• Form a legal partnership with a fiscal lead • Used for joint advocacy/programs or shared services • Determine clear accountability • Share resource formally	
			Coalition		
			• Agree upon shared means to achieve goal • Cultivate vision for success as group • Create formal leadership • Develop plan of action • Share resources		
		Coordination			
		• Reach agreement on joint need • Formalize needs & responsibilities • Share risks and rewards • Communicate as a joint effort			
	Cooperation				
	• Reach agreement on joint goal or activity • Share responsibility & decision-making • Communicate as needed				
Networking					
• Share ideas • Exchange information • Informal communications			*Possible Collective Impact Initiatives*		

COMMON FOCUS	COMMON GROUND	COMMON PROJECT	COMMON IDENTITY	COMMON STRATEGY	COMMON BUSINESS MODEL
Example: Two nonprofit leaders meet for lunch on occasion and share notes on programs, community or new thinking.	**Example:** Two social sector leaders – one in nonprofit and another in government – agree to refer clients to each other and share data on	**Example:** Three arts organizations – all with events celebrating XYZ Month – work together on joint marketing and communications.	**Example:** Many social sector leaders come together to push common agenda and have an agreed- upon action plan.	**Example:** Two nonprofit leaders who have a long-term relationship decide to share staff member or co-locate at facility.	**Example:** Two or more nonprofits legally merge into a single organization.

Forms Of Collaboration   **Strategic Restructuring**

Informal Structure & Process   **Formal Structure & Process**

Deep Dive: https://socialimpactarchitects.com/collaboration-commandments/

SOCIAL IMPACT ARCHITECTS

Program & Strategic Planning
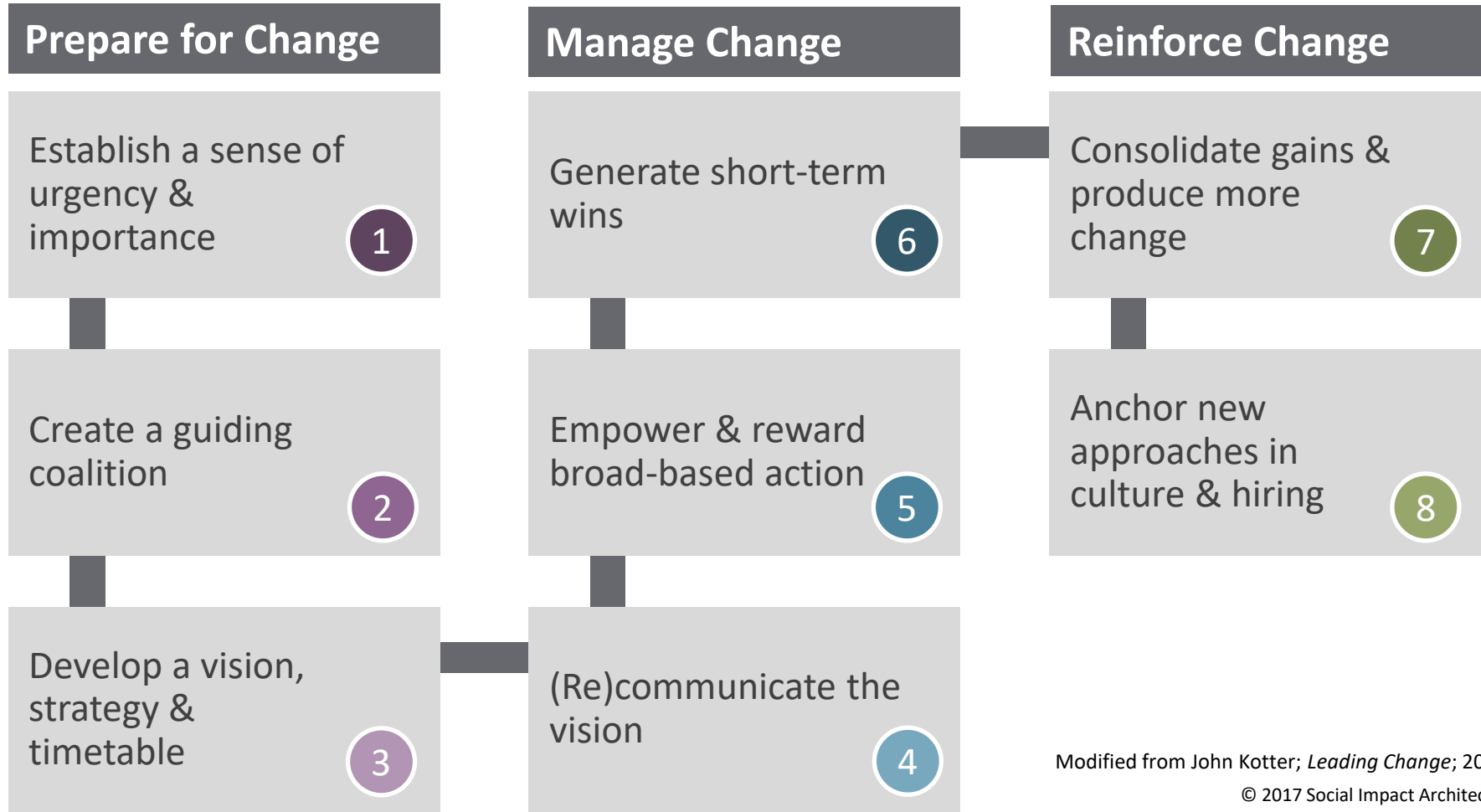
SOCIAL **IMPACT**
ARCHITECTS

Goal: To Adapt & Grow

"**The picture's pretty bleak, gentlemen ...
the world's climates are changing,
the mammals are taking over,
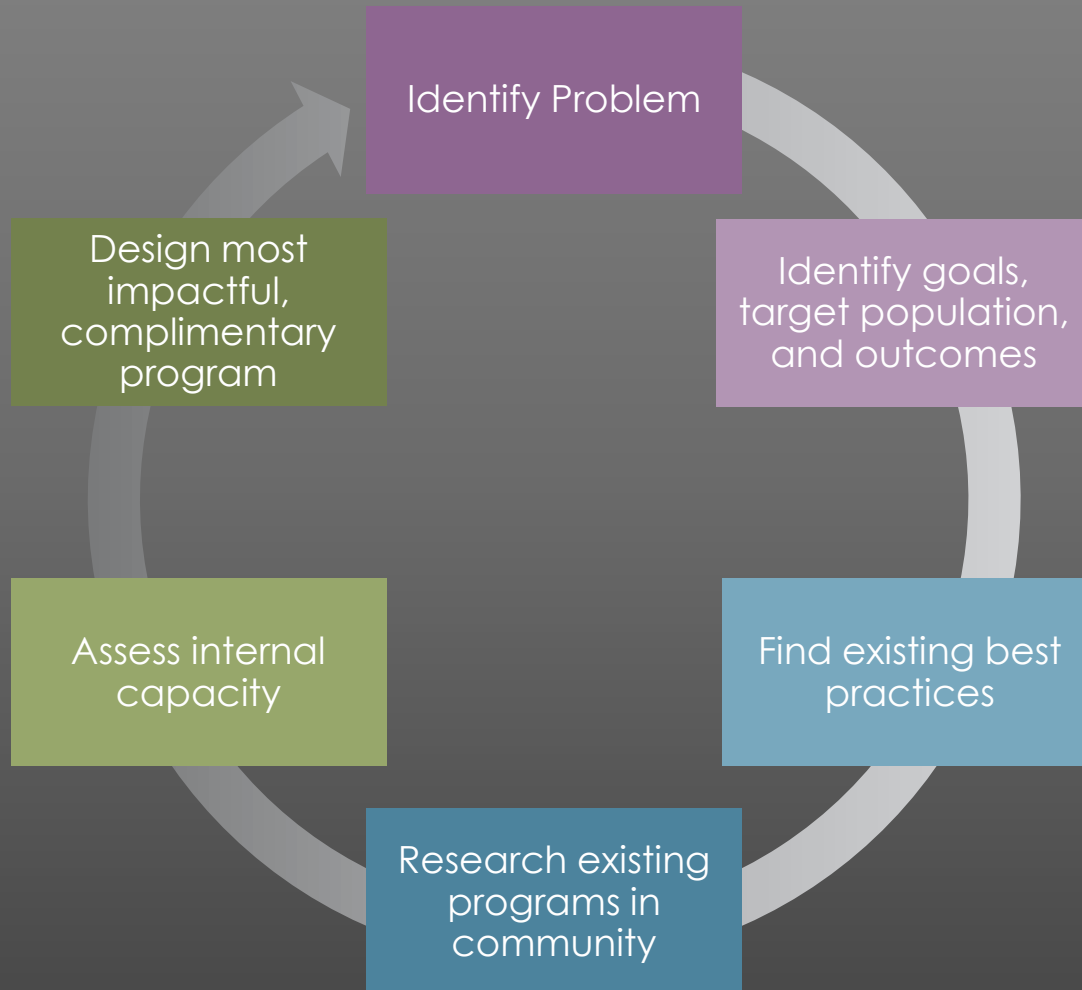and we all have a brain about the size of a walnut.**"

SOCIAL IMPACT ARCHITECTS

Steps to Change Management

Prepare for Change

Establish a sense of urgency & importance **1**

Create a guiding coalition **2**

Develop a vision, strategy & timetable **3**

Manage Change

Generate short-term wins **6**

Empower & reward broad-based action **5**

(Re)communicate the vision **4**

Reinforce Change

Consolidate gains & produce more change **7**

Anchor new approaches in culture & hiring **8**

Modified from John Kotter; *Leading Change*; 2012

© 2017 Social Impact Architects

SOCIAL **IMPACT** ARCHITECTS

Lean Start-Up Framework

Identify Problem

Identify goals, target population, and outcomes

Find existing best practices

Research existing programs in community

Assess internal capacity

Design most impactful, complimentary program

Social Alchemy Framework

Brainstorm Ideas

Develop Hypotheses

Collect Insights

Define Problem

Prove Impact

Learn

Pivot

Build

Measure

Test Ideas

Disseminate

Define Core Elements

INNOVATE | IMPROVE | IMPACT | SCALE

Advanced Concept:

Human-Centered Design

What do people desire?

Desirability

What is technically and organizationally feasible?

Feasibility

Viability

What can be financially viable?

Basis of human-centered design:
DESIRABLE, FEASIBLE and VIABLE

SOCIAL IMPACT ARCHITECTS
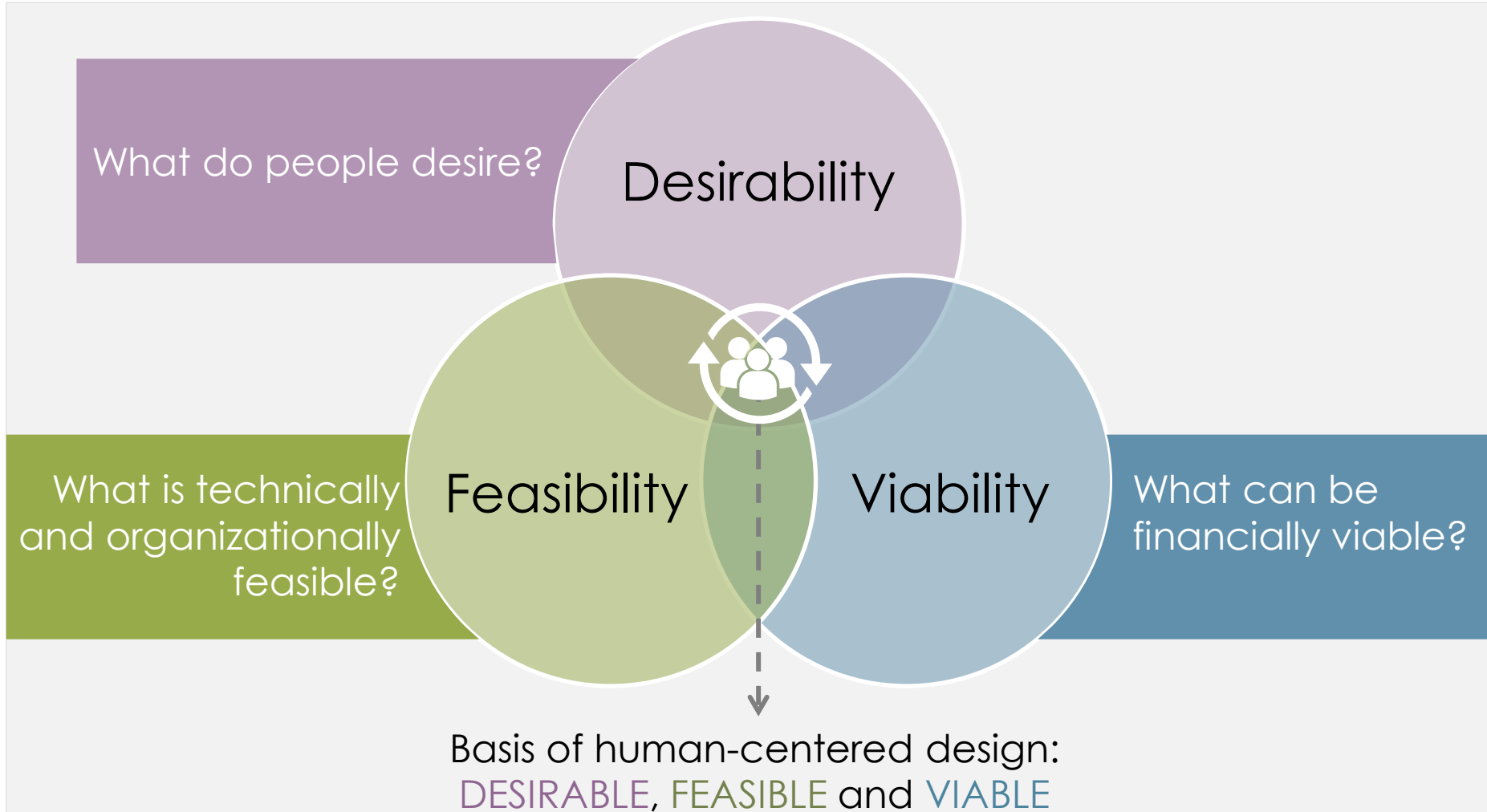
Human-Centered Design:

Methods

Users

Experts

1

2

4

3

Analogous
Situations

Context

Strategic Planning Objectives

1

Understand the organization's current state

2

Identify highest priorities for impact

3

Establish milestones to ensure progress

Planning Process

Vision/Mission Statement

Strategic Plan

Annual Refresh

Execution

Stakeholder
& Customer
Feedback

External
Influences

Annual Review

Action Plan

Results

Measurement

Dashboard

© 2015 Social Impact Architects

SOCIAL IMPACT ARCHITECTS

HOLY TRINITY of
Vision - Mission - Values

VISION
Describes the organization's desired future state of the world (without mentioning the organization itself)

The best vision statements are one-sentence statements that are aspirational, memorable and succinct.

MISSION
Mission – Describes the organization's unique reason for existence and its priorities and methods for accomplishing the vision ("unique" meaning that it connects to your unique value proposition)

The best mission statements are easy to memorize, action-oriented and understandable.

VALUES
Describes the organization's fundamental beliefs and guiding principles that drive its culture

The best core value statements are often power statements, so employees understand the organization's DNA and can easily put them into action.

Deep Dive: https://socialimpactarchitects.com/nonprofit-vision-mission-values/

SOCIAL IMPACT ARCHITECTS

Types of Plans

Less Intensity ↑

ACTION
- Focused on initiation – getting the right things done in the right sequencing
- Created when getting an organization off the ground to help make good decisions

FOUNDATIONAL
- Focused on stability – either in operations or transition
- Created when organization has hit a "limit to growth" due to operational and/or staffing constraints
- Typically done as growth is on the horizon for next plan

BRIDGE PLAN
- Focused on extending existing strategic plan
- Created when uncertainty in future funding or leadership exists and a new strategic plan is not yet plausible
- Requires review of results of existing plan as well as new areas to include

TRANSFORMATIONAL
- Focused on growth – either in programming or geography
- Created when organization or community needs to go to next level
- Requires operational elements to be relatively stable and mature
- Requires community assessment of need

TURNAROUND
- Focused on continuity – rightsizing mission with financials
- Created when organization has hit decline in lifecycle and needs swift action
- Requires competitive and community assessment

More Intensity ↓

Sample

junior players

★ The mission of Junior Players is to encourage intellectual growth, mental well being and the development of life skills in the youth of North Texas through mentoring, creative expression, and participation in dramatic and arts activities. ★

strategic plan overview

IMPACT

Objectives:
- Continue to grow, but intentionally
- Offer Team Musical in 2014/15 as a new offering
- Leverage alumni stories and videos to tell story and share impact

Objectives:
- Cultivate an Advisory Council to support the activities of Junior Players
- Develop plan to better leverage technology to track donors
- Increase new corporate support
- Investigate possible social enterprises through internships and pro-bono support

REVENUE

Objectives:
- Increase board involvement and participation through clear expectations and social activities
- Develop an IT plan to better utilize resources within the organization through internships, pro-bono support, and/or shared services
- Hire an Executive Assistant to support administrative tasks

OPERATIONS

Objectives:
- Conduct marketing audit and develop a plan, including leveraging new media, through internships and pro-bono support
- Create an annual report

BRAND

SOCIAL **IMPACT** ARCHITECTS

Mission

The **Sammons Center GROWS** the arts, in and for this community, by providing essential support uniquely focused on the needs of local performing artists, arts groups, audiences, and arts education to **ENRICH** & **ELEVATE** the lives of people of all ages and backgrounds

Impact

Objectives

GROW efforts as an accelerator of small-to-mid sized arts organizations by conducting a feasibility study for a second location

ENRICH arts within Dallas by developing a 5 year program plan, including development of 30th anniversary plans

ELEVATE the capacity of Dallas arts organizations by developing a first-rate training series and other learning opportunities

Operations & Finance

Objectives

Strengthen the board through greater use of committees, an agreed upon governance model, improved recruitment and retention, and greater accountability ✓

Develop a future and emergency succession plan for board and staff ✓

Further grow and diversify financial resources to support strategy ✓

Services

Objectives

Expand resources for our client organizations through the development of effective, high quality training and educational services and mentorship opportunities for small and emerging arts and cultural groups ✓

Address the crucial need for additional facilities for local arts and cultural groups beginning with a feasibility study ✓

Brand

Objectives

Repackage Sammons as "more than just a building" with a new logo, website, and key messages ✓

Increase community awareness of Sammons as a leader within the Arts community ✓

Advocate for the Arts to be a priority within Dallas as a vehicle for growth and advancement ✓

Vision

We believe that:

- The Arts should be accessible to all
- The Arts ecosystem needs both small and large organizations
- The Arts can help build community and provoke new thinking
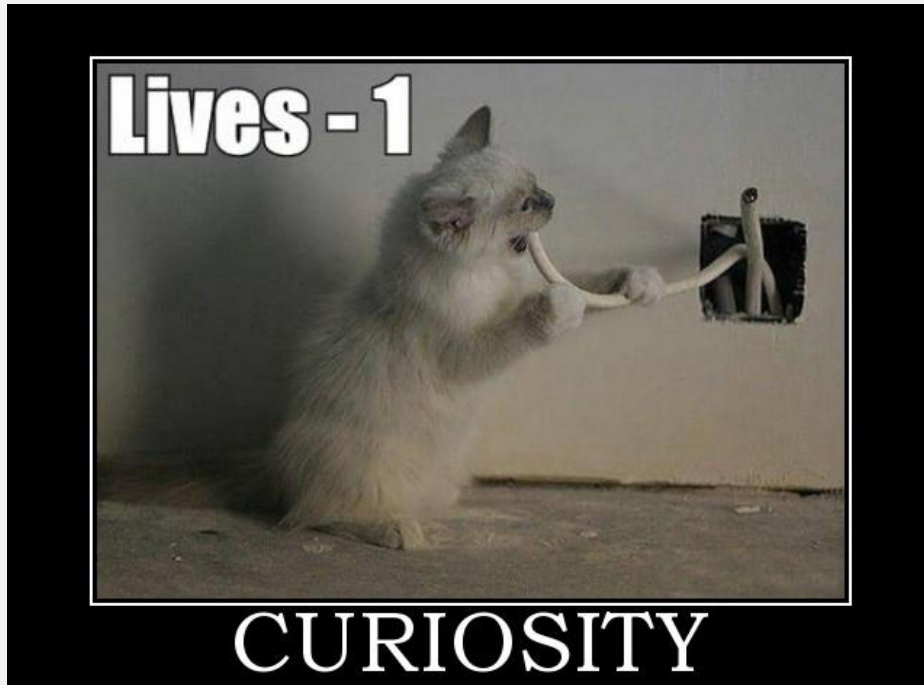- The Arts are a core asset of any thriving economy

Dallas can and should leverage the Arts as a vehicle for growth and advancement

33

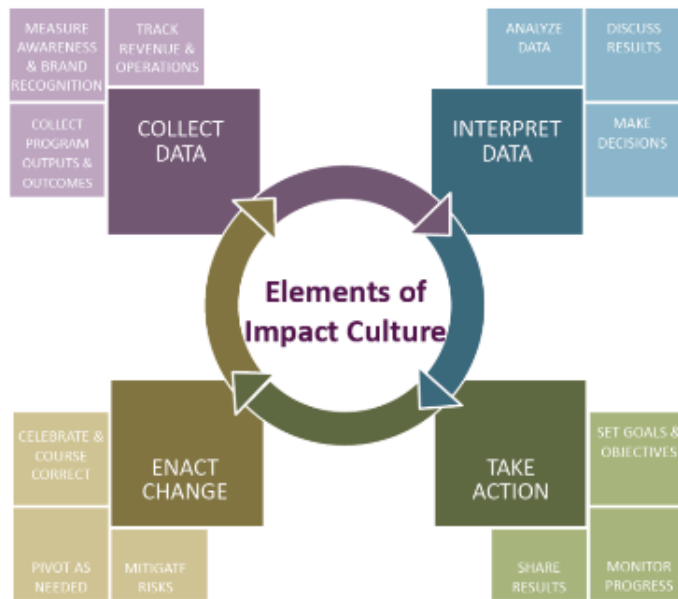# Impact

Goal: Become a Learning Organization

"It strikes again."

SOCIAL IMPACT
ARCHITECTS

Organizational Checklist
for an Impact Culture

Impact Culture: Impact is the bottom line of the social sector. A social sector organization with an impact culture is energized by data, curious to learn, takes deliberate action and embraces change.

INSTRUCTIONS: Based on where you are in the **nonprofit lifecycle**, walk through each checklist item and ask yourself or your management team to gauge how embedded these elements are in your culture. Level 1 loosely correlates with the start-up phase; Level 2, the growth phase; and Level 3, the maturity phase.

Score on your own or score with your team as a fun self-assessment. If you do it as a group, have everyone rate it by giving a thumbs up (good), thumbs down (not good) or thumbs to the side (neutral). Then, develop a short Action Plan to address any deficits or use as a guide for Strategic Planning.

SOCIAL **IMPACT** ARCHITECTS

Organizational Checklist
for an Impact Culture

LEVEL 01 — *Organization Understands and Appreciates Why Impact Is Important*

- Board and staff can recite what the organization is trying to achieve and why it is important to the community/greater good
- Everyone truly believes that measuring impact will lead to being a high-impact, high-performance organization – which ultimately means making a bigger difference for those you serve
- Everyone appreciates that change is difficult and embraces impact management as an opportunity to demonstrate progress and continuous improvement
- Staff track their impact (e.g., IT, HR, finance, & development) through outputs and outcomes
- Program and development staff are on the same team and aligned on program outcomes to be measured
- Staff understand their role in impact management and have performance measures directly connected to the organization's strategy and impact
- Board tracks its own impact (e.g., funds raised, attendance) to improve engagement and ensure accountability
- Board and staff regularly share results openly, celebrate success and discuss course corrections

LEVEL 02 — *Organization Proactively Designs & Measures Programs/Operations Using Best Practices*

- All Level 1 items firmly embedded in culture
- Staff use a sophisticated program design model, such as Lean Startup
- Staff regularly track best practices nationally and embed them into their activities
- Data is collected, stored properly, and analyzed on schedule, as planned
- Staff feel empowered to question why data is being collected, especially if it is not used
- Staff have systems and tools to help them collect and interpret real-time data and make changes as needed
- Stories are utilized to illustrate success and bring data to life
- Staff possess necessary skills and are encouraged to critically assess all aspects of their work
- Staff do not want to move forward on major decisions without data and careful reflection
- Staff are rewarded for embracing impact management

LEVEL 03 — *Organization Champions Impact Management to Grow & Improve*

- All Level 1 and 2 items firmly embedded in culture
- Organization shares information freely, internally and externally, and "cross-pollinates" as much as possible
- Improvements are made based on data collected and analyzed
- Organization is benchmarking its data against best practices
- Staff receives feedback on how ideas and improvements have led to positive change
- Organization is a learning organization where staff are encouraged to be curious and invest in their professional development
- Organization appropriately charges donors/funders for impact management and audits as a direct cost of doing business
- Organization is using cost-benefit analysis and social return on investment in its donor/investor conversations
- Board and staff have richer and more informed conversations
- Donors better understand the big picture through data and stories
- Organization takes calculated risks and worries more about moving the needle than fear of failure
- Funders are taking notice

Impact Measurement Process

Continuous Process

Develop TOC & Logic Model **1**	Develop Performance Indicators **2**	Collect Data **3**
Analyze Results **4**	Communicate Findings **5**	Program Improvement

Theory of Change

A brief statement that discusses the casual relationship between actions, short-term objectives/outcomes, and long-term outcomes.

Example: If poor women in Africa have microbicidal contraceptives (they control), AIDS will spread less.

SOCIAL **IMPACT** ARCHITECTS

Logic Model/Social Value Chain

Inputs	Activities	Outputs	Outcomes	Goal Alignment
What do you put in?	What do you do?	What happened	What resulted **Less** What would have happened anyway **Equals** IMPACT	How aligned is the impact with your organization goal?

Example: Outcomes vs. Impact

Inputs	Activities	Outputs	Outcomes	Goal Alignment
What do you put in?	What do you do?	What happened	What resulted **Less** What would have happened anyway **Equals** IMPACT	How aligned is the impact with your organization goal?

CU NY The City University of New York	Pre-CUNY ASAP Graduation Rate	Post-CUNY ASAP Graduation Rate	Difference
	21%	56%	35%
	What would have happened anyway	**Outcome**	**Impact**

SOCIAL IMPACT ARCHITECTS

Principal Leadership Program Impact Model

THEORY OF CHANGE: By offering leadership training and coaching, the principal leadership program aims to increase the management capacity of school principals by improving their educational and organizational abilities that support change in schools, thereby positively impacting student achievement.

INPUTS	ACTIVITIES		OUTPUTS	OUTCOMES
•Committed principal •Knowledgeable & trained teaching staff	• Teacher feedback • Professional development • Collect stories • Measure & report on impact	**STUDENT**	• # of student reached by teachers • # of teachers receiving feedback and training	• Improved teaching quality* • Improved student academic achievement+
• Knowledgeable & trained staff • Engaged principal • Curriculum • Coaching • Evaluation	• Develop & implement the following: ✓ School dashboard ✓ Culture assessment ✓ Capstone plan ✓ Strategic plan and timeline for implementation ✓ Plan for performance management and timeline for implementation ✓ Succession plan • Engage school leadership • Collect stories • Measure & report on outcomes	**SCHOOL**	• # Of principals developing and implementing the following: ✓ School dashboard ✓ Culture assessment ✓ Capstone plan ✓ Strategic plan ✓ Performance management plan • # of principals engaging school leadership	• Increased clarity on school-wide goals and teacher expectations • Increased presence of structures to support attainment of school-wide goals • Improved school culture* • Increased quality of performance feedback to teachers* • Improved teacher performance*
• Knowledgeable & trained staff • Curriculum • Coaching • Evaluation	• Conduct program • Provide coaching • Collect stories • Measure & report on outcomes • Refine offerings	**PRINCIPAL**	• # of participants • # of graduates • # of sessions • # engaged in coaching	• High satisfaction • Increased knowledge, skills and confidence • Improved attitudes

Level of Control

* Not captured or measured, + Captured but not measured

SOCIAL **IMPACT** ARCHITECTS

Cookie Example

What makes a <u>great</u> chocolate chip cookie?

Hilton

SELECT HOTEL BRAND

DOUBLETREE by Hilton

URGENT MEDIA REQUESTS

DOUBLETREE BY HILTON | Read the News | About the Brand | Our Properties | Media Resources | Signature, Warm Cookie | Contact Us

DoubleTree Signature Cookie Recipe

Makes 26 cookies

½ pound butter, softened (2 sticks)

¾ cup + 1 tablespoon granulated sugar

¾ cup packed light brown sugar

2 large eggs

1 ¼ teaspoons vanilla extract

¼ teaspoon freshly squeezed lemon juice

2 ¼ cups flour

1/2 cup rolled oats

1 teaspoon baking soda

1 teaspoon salt

Pinch cinnamon

2 2/3 cups Nestle Tollhouse semi-sweet chocolate chips

1 3/4 cups chopped walnuts

Performance Management

Performance Management

Performance Measures

QUANTITY

How Much

did we do?

(#)

QUALITY

How Well

did we do it?

(%)

@socialtrendspot
www.socialimpactarchitects.com

SOCIAL **IMPACT** ARCHITECTS

Performance Management

Performance Measures

Effort	**Effect**
How hard did we try?	Is anyone better off?

Performance Management

	QUANTITY	**QUALITY**
EFFORT	**HOW MUCH DID WE DO?** How much service did we deliver?	**HOW WELL DID WE DO IT?** How well did we deliver it?
EFFECT	**IS ANYONE BETTER OFF?** How much change / effect did we produce? What quality of change / effect did we produce?	

Objectives	Activities	Deadline	% Complete	Owner(s)	KPI (Key Performance Indicators)
IMPACT: *Operate as a data-driven organization utilizing research and insights in driving continuous improvement and deliberate growth*	+Collect data & review via Continuous Quality Improvement (CQI) meetings	**10.31.17**	**50%**	Director of Programs	+Ongoing monitoring from baseline data for continuous improvement +Development of dashboard for each program focused on measurements that matter +Gaps in data are identified and resolved
	+Institute an opportunity assessment to guide program decisions so expansion and execution of services are mission-focused and seamless	**08.31.17**	**100%**	Mgt Team	+Opportunity assessment is used 90% of time to decide on official go/no-go decision +Staff report on survey that growth is managed properly

Objectives	Activities	Deadline	% Complete	Owner(s)	KPI (Key Performance Indicators)
GOVERNANCE: *Cultivate a board who is active, serve as ambassadors, and are accountable to organizational goals*	+Provide board experiences to engage board	**Ongoing**	**25%**	CEO/Mkt Chair	Offer at least 1 board experience a quarter with 55% attendance Share mission moments at 80% of board meetings Board reports greater comfort with storytelling
	+Adopt formal board commitments & use governance committee for training and accountability	**08.31.17**	**75%**	CEO/Gov Chair	75% of board attends meetings 80% actively serves on a committee 90% participate in at least one event 100% makes a financial contribution to organization

SOCIAL **IMPACT** ARCHITECTS

Organizational Dashboard

MISSION: To promote, deliver, and expand the best early care and education programs for children, parents and early childhood professionals.

IMPACT

- Position XYZ as a leader in the two-generation approach through thought leadership, education and advocacy.
- Utilize the Texas Rising Star assessment data to develop an annual strategic plan to improve quality among early childhood providers.
- Work collaboratively with community partners to assess current and future needs/demands for early childhood professional development.
- Elevate XYZ Early Childhood Programs to promising/best practices in the two-generation model and position programs for sustainability
- Build and execute a central trusted website/app to connect Dallas families and service providers to education, health and family support services.
- Maximize impact through comprehensive program review/evaluation system to assess program effectiveness and continuously improve to meet dynamic community needs

KPIs:

- Increased community awareness regarding 2GEN model
- Increase in children enrolled in TRS program
- Increase in centers who improve their TRS rating
- Increase in teachers with CDAs or higher
- Continue all XYZ centers with NAEYC certification
- Increase in teacher proficiency based on academic advancement CLASS scores
- Increase in family self sufficiency total score
- Increase in children & parents connected with a medical home
- Increase community awareness for NTXF.org
- Increase outcome measurement satisfaction score on annual survey

BRAND

- Develop a marketing strategy and external communications plan to leverage two-generation model and build greater awareness of XYZ

KPIs:

- Increase marketing score on annual survey
- Increase in media hits related to two-generational model and early childhood

REVENUE

- Leverage new position around the two-generation approach to identify new or revised strategies for stable and diverse revenue sources.

KPIs:

- Increase in number of individual donors and average gift size
- Increase in percentage of successful grants
- Increase in community reach through volunteers, board members, & friends
- Continue successful audits & satisfaction with financials, cash flow, and financial controls
- Increase financial management score on annual survey

OPERATIONS

- Position XYZ to become a nonprofit Employer-of-Choice
- Create facility planning strategy to effectively meet agency and community needs

KPIs:

- Increased percentage of staff who believe XYZ is an employer of choice
- Increased retention of staff
- Increase in staff who report that buildings are kept safe and clean and meet their needs
- Increase technology score on annual survey

SOCIAL IMPACT ARCHITECTS

Check-Out

SOCIAL IMPACT ARCHITECTS

SWOT Analysis

The most commonly used tool to conduct an organizational audit is the SWOT analysis, which is often used during the strategic planning process.

STRENGTHS

- What do you do better than anyone else?

WEAKNESSES

- What could you improve?
- What do others do better than you?
- What inhibits your ability to achieve success?

OPPORTUNITIES

- Where are the good opportunities facing you?
- What are the interesting trends you are aware of?

THREATS

- What obstacles do you face?
- What are other nonprofits doing that you should be worried about?
- What are funders doing that you should be worried about?

Additional Readings

Social trendSpotter
Latest Trends in the Social Sector

- Impact Culture
  - https://socialimpactarchitects.com/impact-culture/
- Impact Mindset
  - https://socialimpactarchitects.com/impact-mindset/
- Lean Startup
  - https://socialimpactarchitects.com/nonprofit-lean-startup/
- Theory of Change
  - https://socialimpactarchitects.com/theory-of-change/
- Activity Trap
  - https://socialimpactarchitects.com/activity-trap/
- Logic Model
  - https://socialimpactarchitects.com/logic-model/
- Evaluation Plan
  - https://socialimpactarchitects.com/evaluation-planning/

SOCIAL **IMPACT** ARCHITECTS

Suzanne Smith, MBA

Founder & CEO, Social Impact Architects

Suzanne Smith

@snstexas @socialtrendspot

SocialImpactArchitects

company/social-impact-architects
in/suzannesmithtx

suzanne@socialimpactarchitects.com
www.socialimpactarchitects.com

EDUCATION

- MBA, Duke University's Fuqua School of Business
  - Selected as CASE (Center for the Advancement of Social Entrepreneurship) Scholar
- Adjunct Professor **–** University of Texas at Arlington / Pepperdine

AWARDS & HONORS

- "Best for the World" Small Business List – B Corp, 2015-2020
- Tedx Speaker, "Everyone Can be a Changemaker," 2015
- Huffington Post's Top 10 Social Sector Blog, 2014
- Next Generation Social Entrepreneurs Award, 2010

COMMUNITY LEADER

- **Dallas, Texas –** Dallas Commission on Homelessness, Mayor's Task Force on Poverty, Leadership Dallas, Leadership North Texas & Junior League
- Dallas Regional Chamber, Young ATHENA Award, 2014
- Dallas Business Journal's 40 Under 40 Award, 2012
- **Cincinnati, Ohio –** Founder, Flywheel: Social Enterprise Hub

About Social Impact Architects

Social Impact Architects® is a social change agency that provides consulting and learning resources to changemakers, working alongside them to design creative and transformative solutions to social issues. SIA uses innovative, market-driven management tools to design cost-effective, pragmatic plans for our clients. We work collaboratively with our clients to ensure organizational ownership and improved capacity to sustain the solutions we help design.

About SIA

- Created in 2009 to bridge the divides in the creation of social solutions between governments, philanthropy, and nonprofits

- Established as a Benefit Corporation; received Best in the World from 2015-2019

- While headquartered in Dallas, Texas, the firm works across the country with clients large and small with a focus on the middle of the country

- Leverages a diverse virtual team with masters and doctorate degrees from across the country speaking multiple languages

Firm Expertise

- Authors *Social TrendSpotter* (@socialtrendspot), one of the sector's top blogs according to the *Huffington Post*. Known for its relatable way of blending important concepts and new ways of working with storytelling, *Social TrendSpotter* has been hailed by readers as "the only blog I read each week."

- *Social Impact Architects* has successfully contributed to system change and innovation projects at the local, state and national level. This process has been so successful that it was presented in 2015 at the U.S. Conference of Mayors as a best practice.

- *Social Impact Architects* serves in a number of advisory roles to government, including HHS's roundtable on social enterprise.

CEO, Suzanne Smith, testifying at the U.S. Conference of Mayors in 2015.