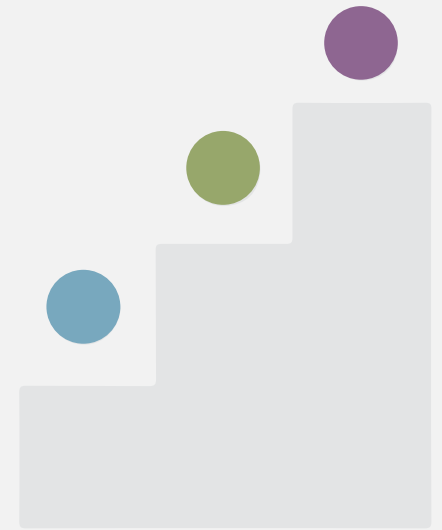*Moving From Intuition to Insight*

Social Impact as a Cultural Norm

SocialImpactArchitects

@snstexas @socialtrendspot

socialimpactarchitects.com/wp

Suzanne Smith, MBA
Social Impact Architects / Adjunct Professor, UTA

Chat #1

Name / Organization / Location

Check-in: Your favorite 4th of July tradition

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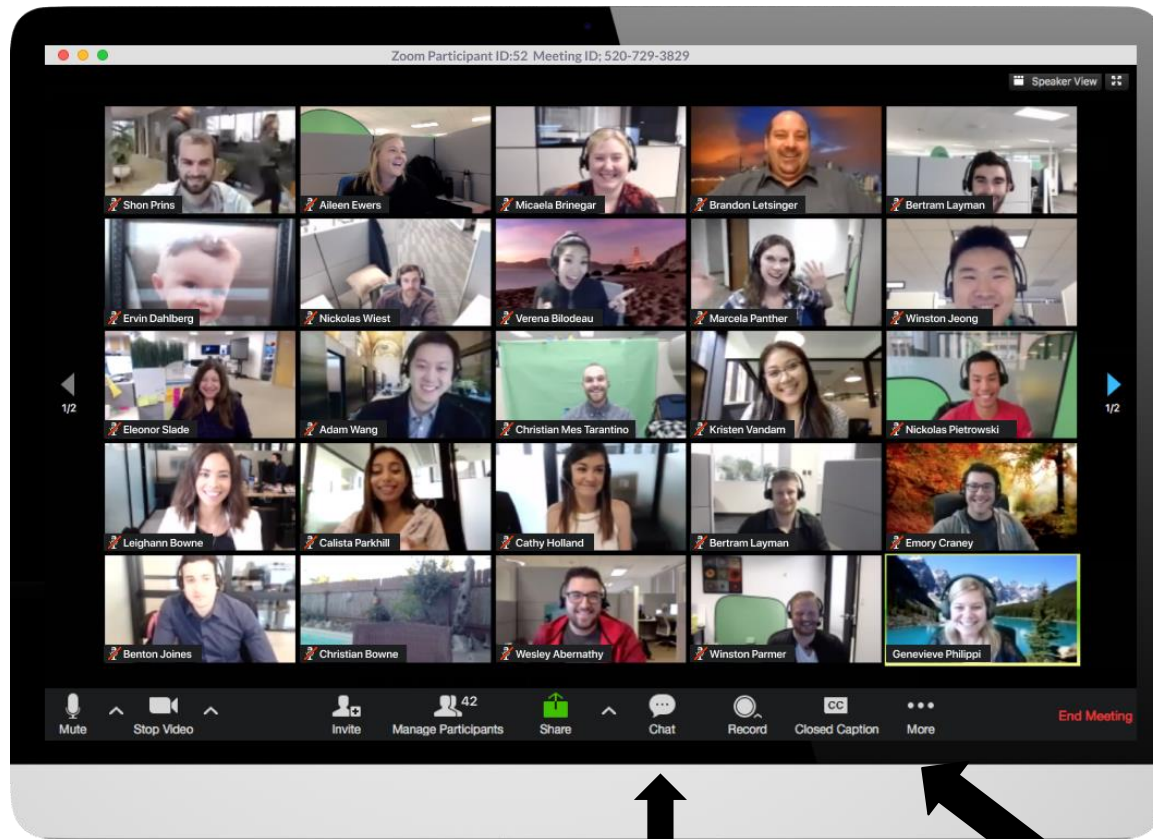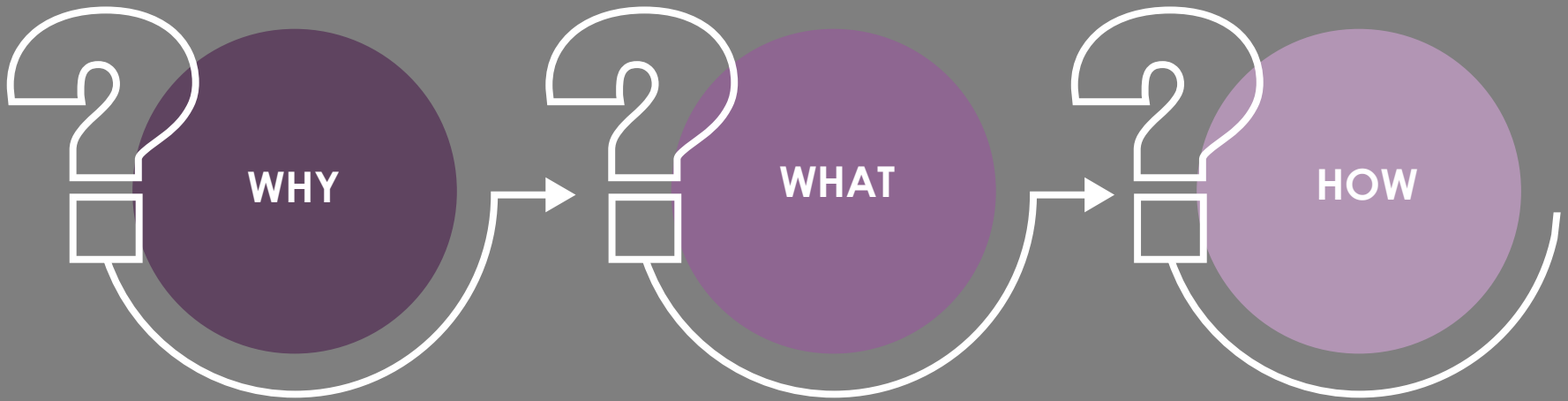
Chat for Comments or Questions

Toggle Closed Caption

Deep Dives AVAILABVLE AT: <u>https://socialimpactarchitects.com/blog</u>

SOCIAL **IMPACT** ᴀʀᴄʜɪᴛᴇᴄᴛs

Goals for Today

WHY   **WHAT**   **HOW**

SOCIAL **IMPACT** ARCHITECTS

Chat #2

Word Association Game:
When I say "impact," what does it mean to you?

SOCIAL **IMPACT** ARCHITECTS

SOCIAL IMPACT ARCHITECTS

The Future Is Here

SOCIAL IMPACT ARCHITECTS
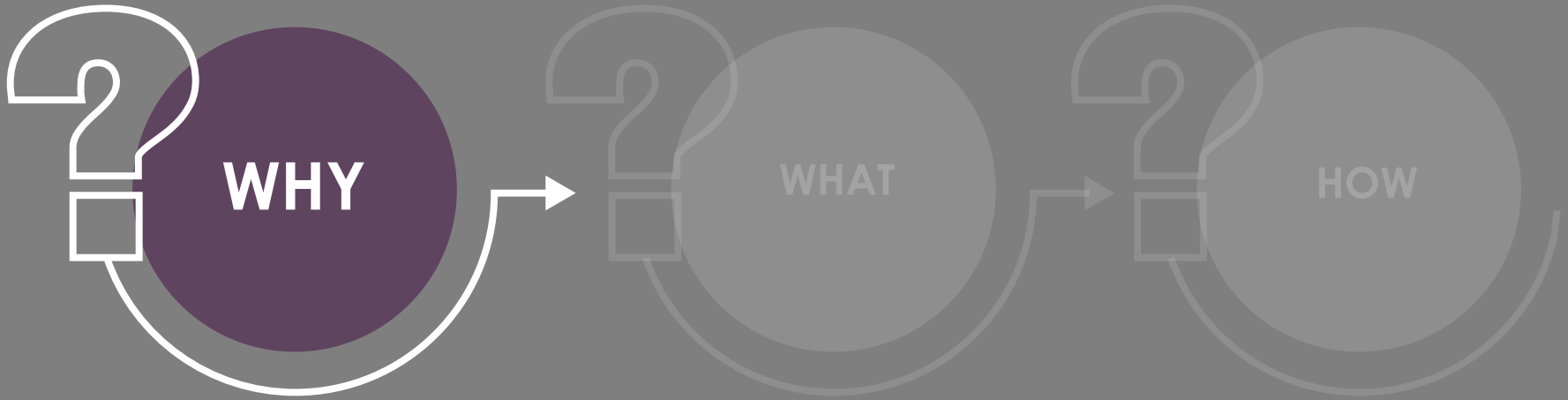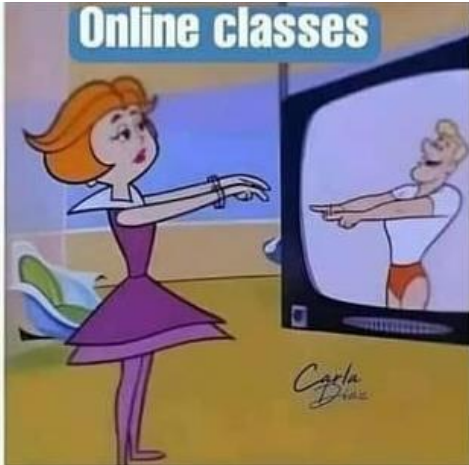
Changes in the Social Sector

20th CENTURY
- Mission-Focused
- Donor Model
- Program-Driven
- Bootstrapped
- Risk-Averse

21st CENTURY
- Impact-Focused
- Investor Model
- Results-Driven
- Sustainable
- Entrepreneurial

Deep Dives: https://socialimpactarchitects.com/nonprofit-trends-2017
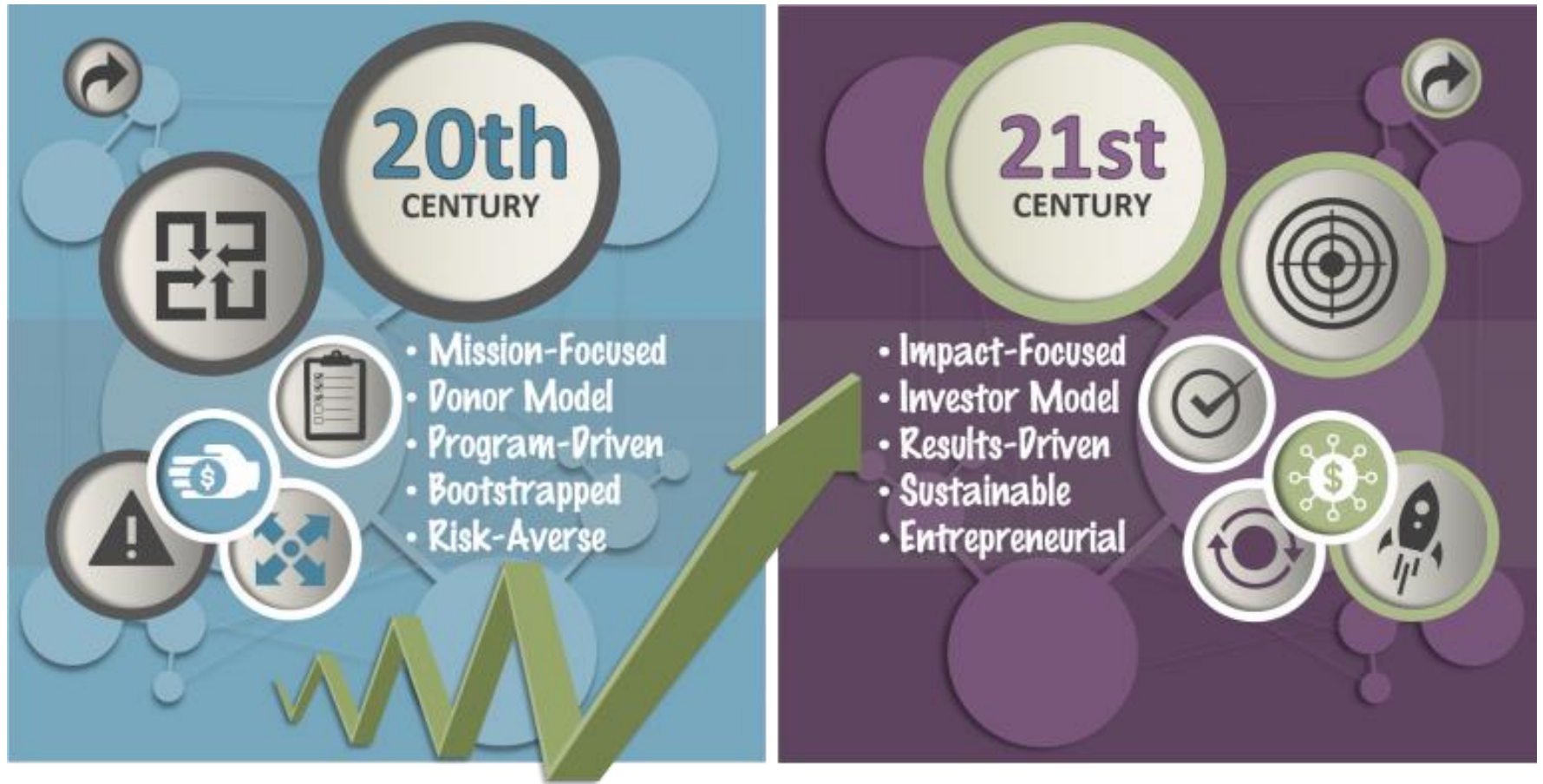
SOCIAL IMPACT ARCHITECTS

Reminder
Nonprofit Sustainability Flywheel

Deep Dive: https://socialimpactarchitects.com/nonprofit-sustainability

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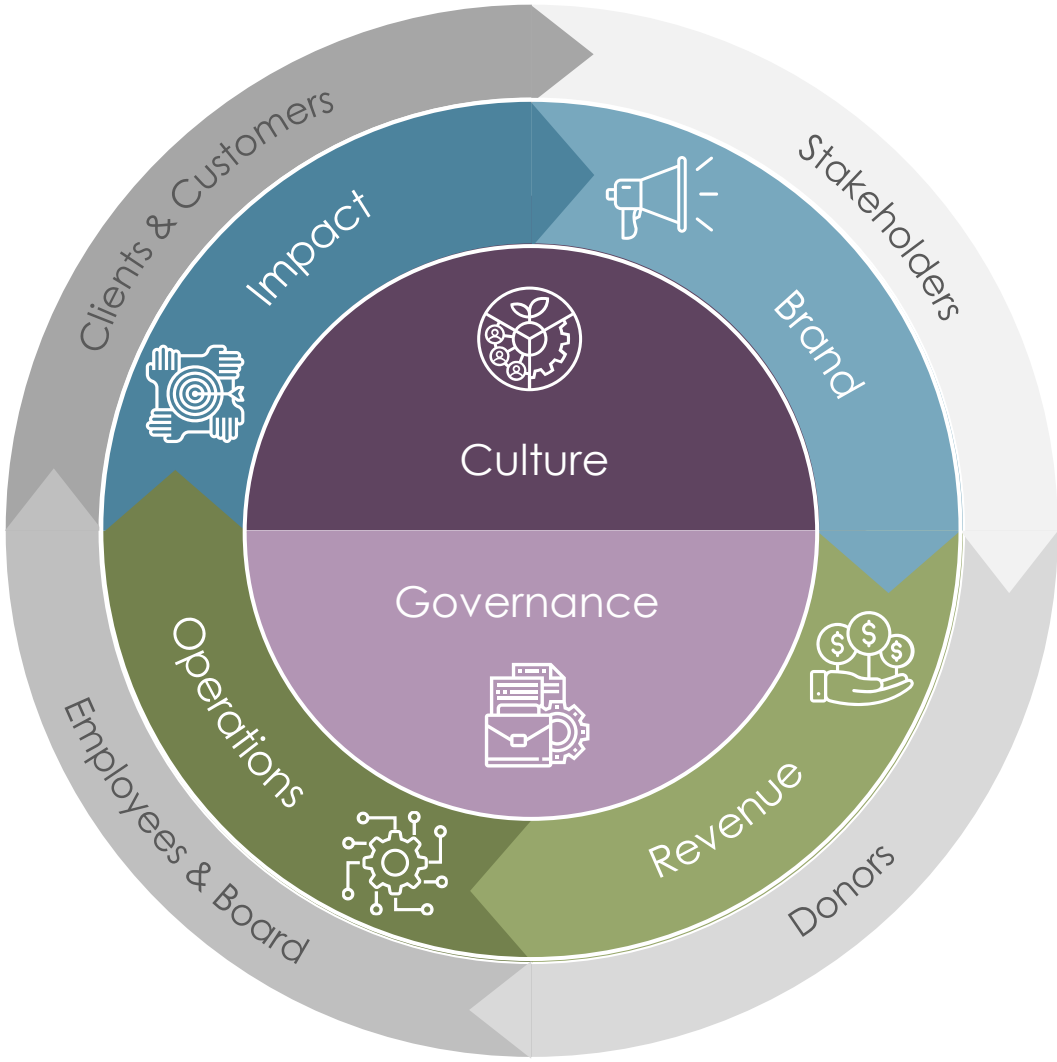
Nonprofit Lifecycle

Turnaround

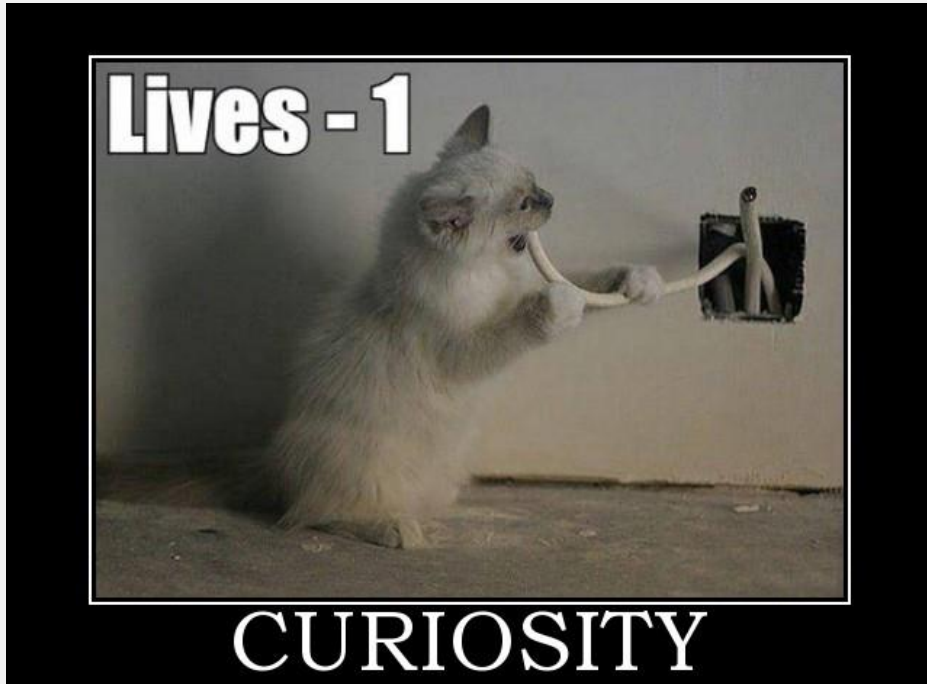| Lifecycle Stages	Idea	Start-up	Growth	Maturity	Decline	Crisis
Impact	• Informal – Need established, best practices integrated & pilot launched	• Pilot successful – Lessons integrated into design • Measurement starts	• Established in marketplace – Strong results, partner-of-choice & consistent delivery	• 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
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
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
Operations	• Entrepreneurial Founder using volunteer resources for guidance	• Flat organization – Decisions are likely made by Founder • Volunteers needed for hands-on support	• Founder has hired or becomes Executive Director and is key decision-maker with Board guidance • Volunteers are used as resources	• Leadership is often second or third generation from Founder • Clear division of labor & accountability among staff	• Increasing turnover of staff & volunteers • Decreased ability to attract top talent	• Inability to fill key roles
Culture	• Culture is defined by Founder	• Culture is action-oriented	• Increased division of labor & accountability as staff is hired • Culture is results-oriented	• Culture is well-defined and serves as a competitive advantage • Volunteers are seen as ambassadors	• Decreased transparency	• High contention & division among staff • Mistrust of leadership
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

Organizational Elements

Deep Dive: https://socialimpactarchitects.com/nonprofit-lifecycle

Goal: Become a Learning Organization

"It strikes again."

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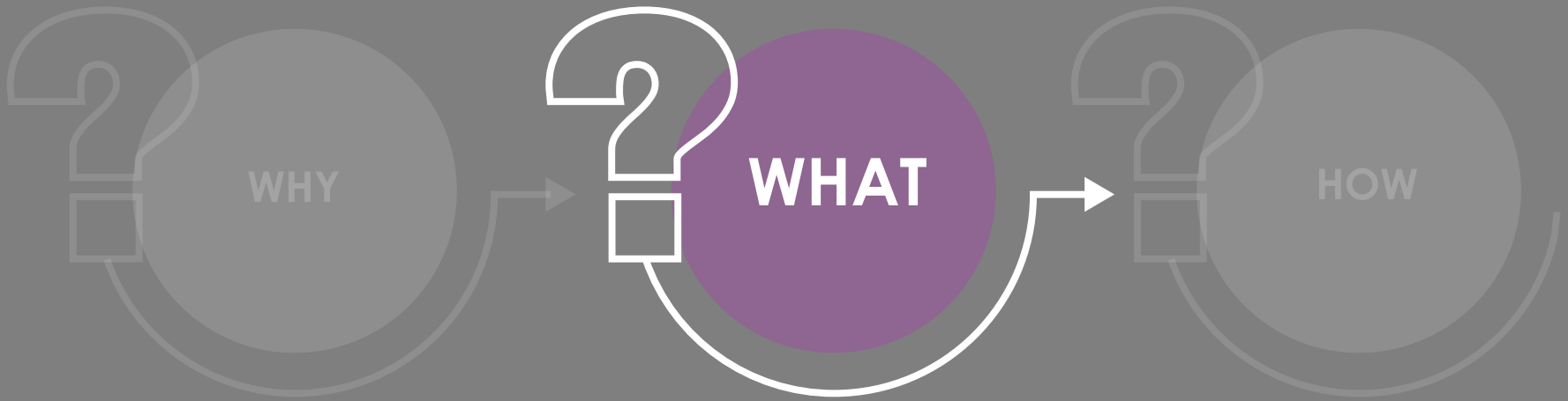
Key Terms: Data vs. Information

Data represents a fact or statement of event without relation to other things.

- It can exist in any form, usable or not. It does not have meaning itself – it simply exists.
- *Example: It is raining.*

Information is data that has been given meaning by way of a relational connection.

- Information embodies the understanding of a relationship of some sort, such as cause and effect.
- *Example: The temperature dropped 15 degrees, and then it started raining.*

SOCIAL **IMPACT** ARCHITECTS

Types of Information
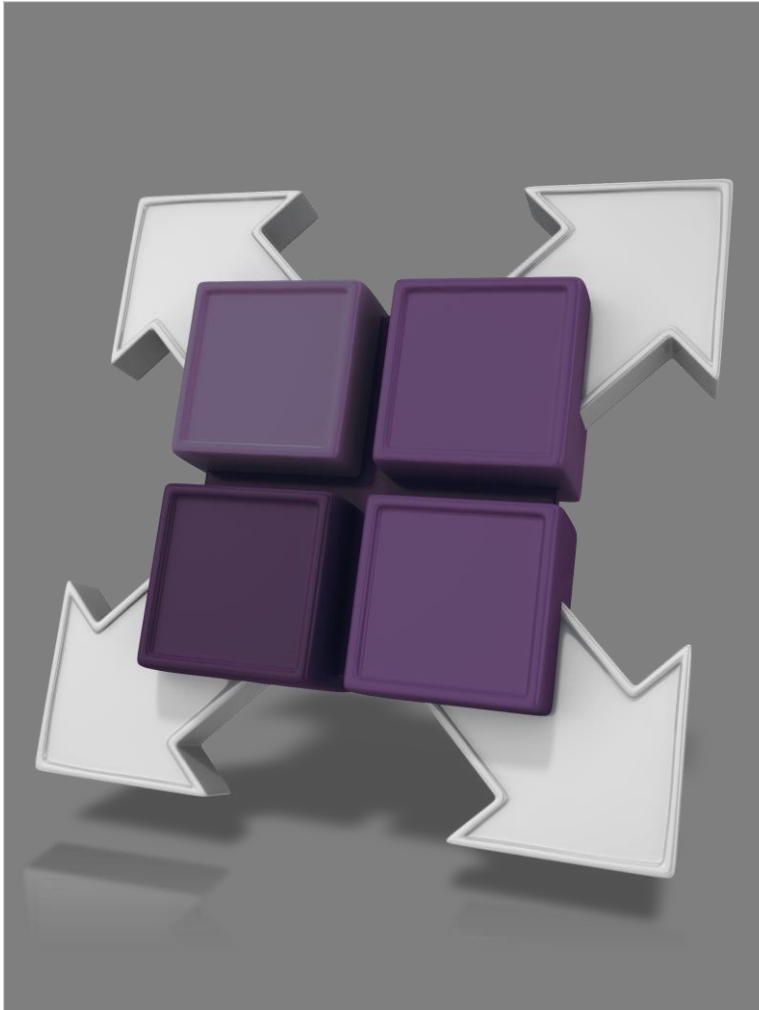
DESCRIPTION
- Report or account of an experience or observation

INFERENCE
- Conclusion derived from beliefs or what are thought to be facts

ATTRIBUTION
- Ascribed, inferred or assumed cause or characteristic

EVALUATION
- Determination or judgment

Key Terms
Knowledge vs. Understanding

KNOWLEDGE is the appropriate collection of information, such that its intent is to be useful.

- Knowledge represents a pattern that connects and generally provides a high level of predictability as to what is described or what will happen next.
- *Example: It rains because of all the interactions that happen between raining, evaporation, air currents and temperature changes.*

UNDERSTANDING/ACTION is the process by which knowledge can be taken and synthesized into useful actions based on what was previously known and understood.

- Builds on currently held information, knowledge and understanding
- *Example: If humidity is high and the temperature drops, the atmosphere is often unlikely to hold moisture, so it rains. Therefore, when this happens, I need a raincoat.*

SOCIAL **IMPACT** ARCHITECTS

From Data to Action

ACTION
Understanding

KNOWLEDGE

INFORMATION

DATA

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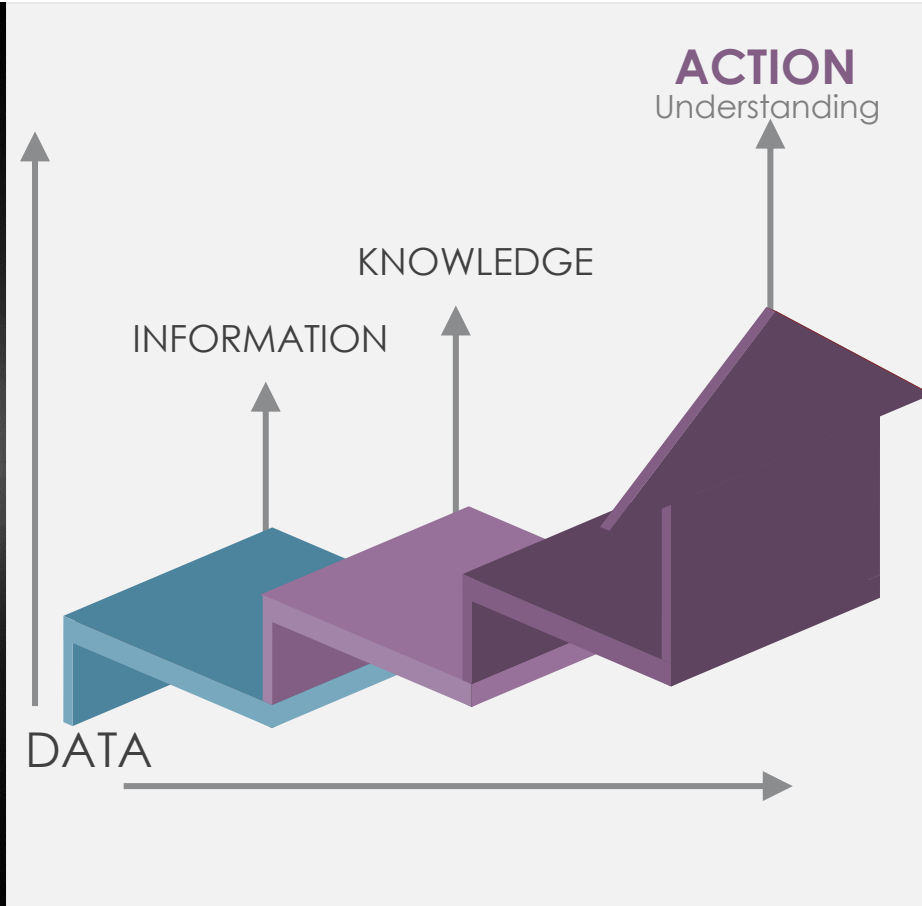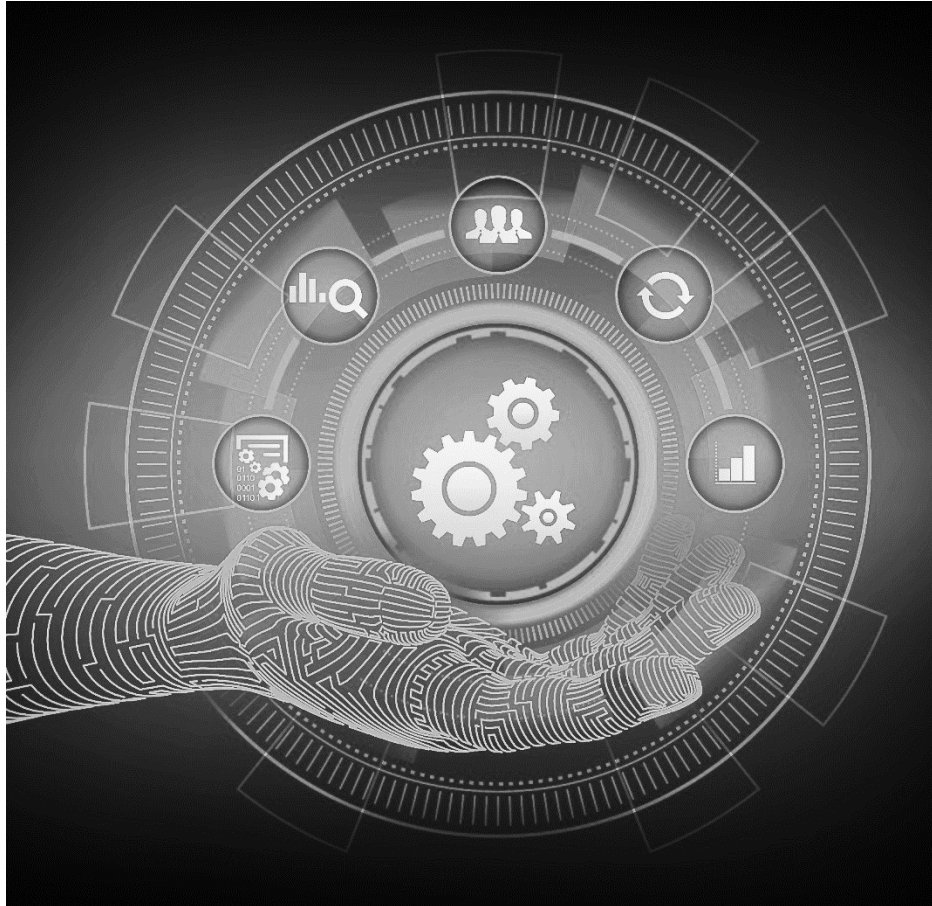
Mental Model: Ladder of Inference
Challenge Ways of Thinking and Working

ACTION

Why do I believe this to be the right action?
What are some alternative options?

BELIEFS

What beliefs do I hold about this?
What conclusions are they based on?

CONCLUSIONS

Why did I conclude this?
What are my assumptions there?

ASSUMPTIONS

Are my assumptions valid?
Why am I assuming this?

INTERPRETATIONS

Am I looking at this data objectively?
What other meanings could they have?

SELECTED DATA

What did I ignore or didn't pay attention to?
Are there other sources of data I didn't consider?

AVAILABLE DATA

Observable reality

SOCIAL **IMPACT** ARCHITECTS

Reminder: Internal vs. External

ACTION
Understanding
KNOWLEDGE
INFORMATION
DATA

EXTERNAL ENVIRONMENT

INTERNAL ENVIRONMENT

INPUT → PROCESS → OUTPUTS

OUTCOMES

**FEEDBACK
LOOP**

SOCIAL IMPACT ARCHITECTS
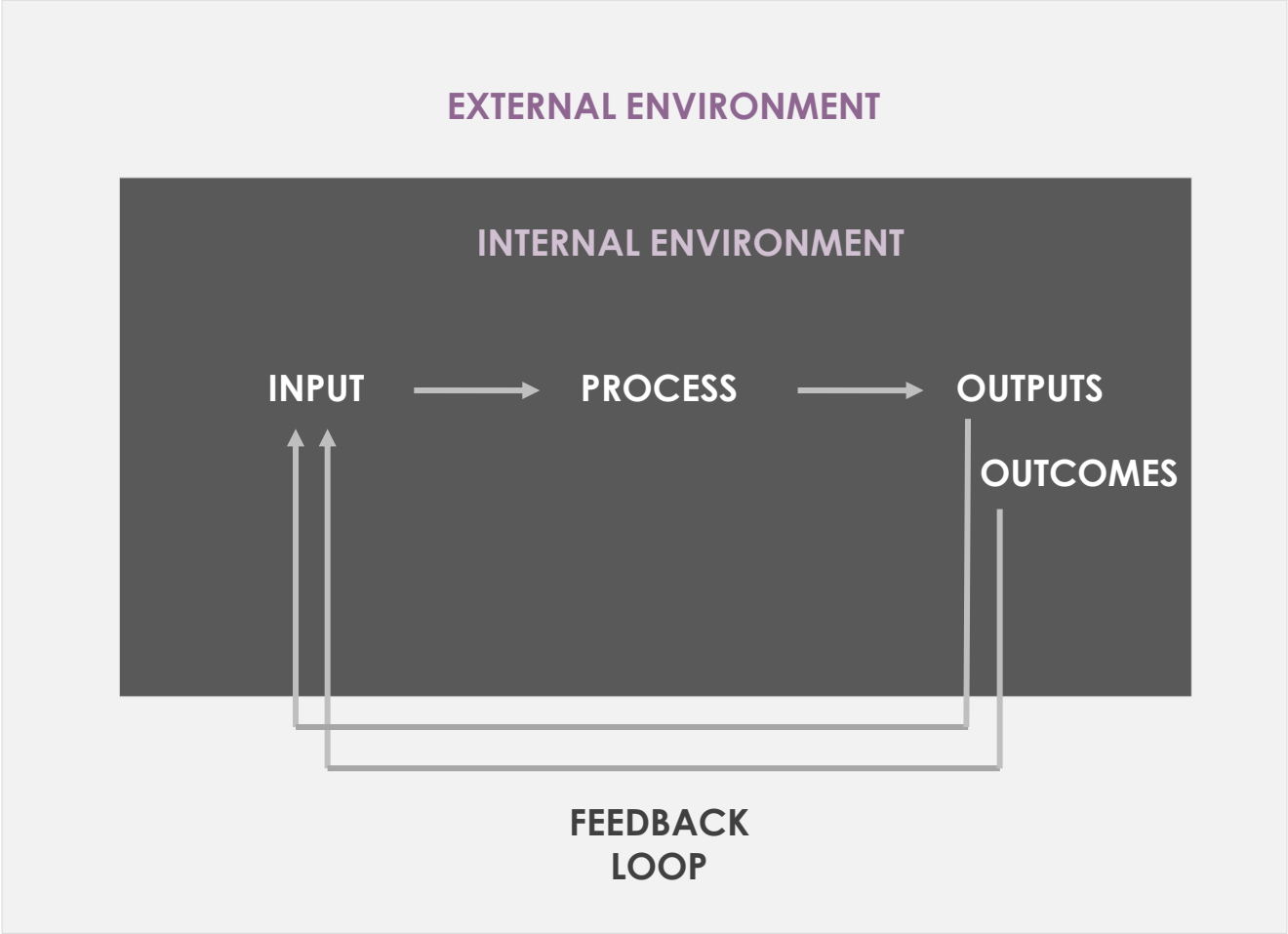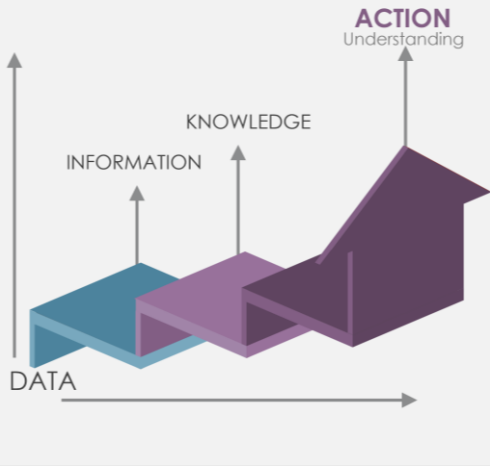
Strategic Thinking Model

INPUTS
- Problem Identification
- Stakeholders
- Trends
- Patterns

Define the Challenge

PRACTICES
- Map the Ecosystem
- Uncover and Test Assumptions
- Generate Ideas
- Identify Opportunities
- Develop Scenarios
- Craft a Strategic Vision

OUTPUTS
- Make Decisions
- Take Actions

Refine the Challenge

- Monitor
- Learn
- Apply
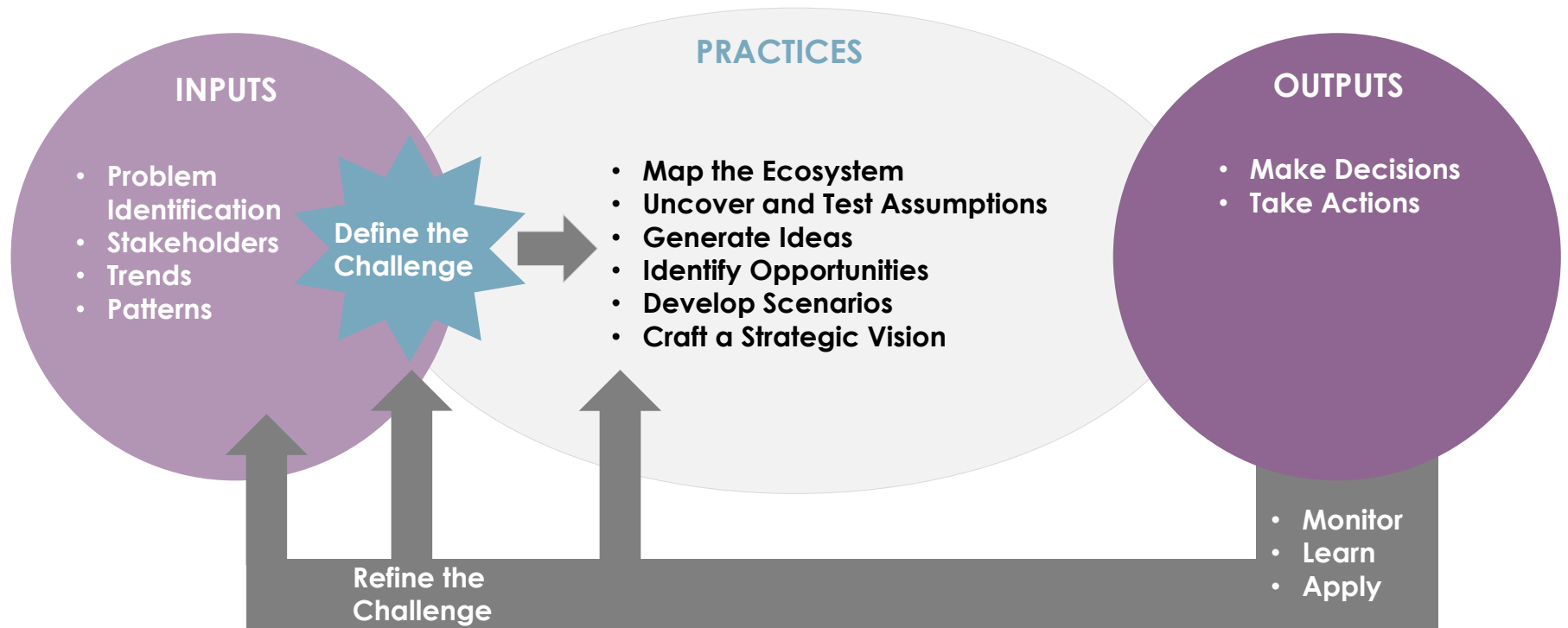
From Data to Action: Example #1
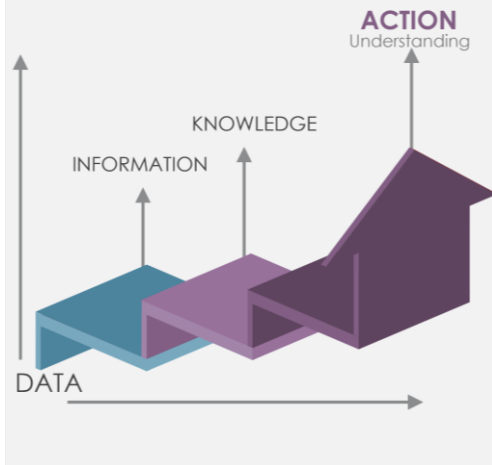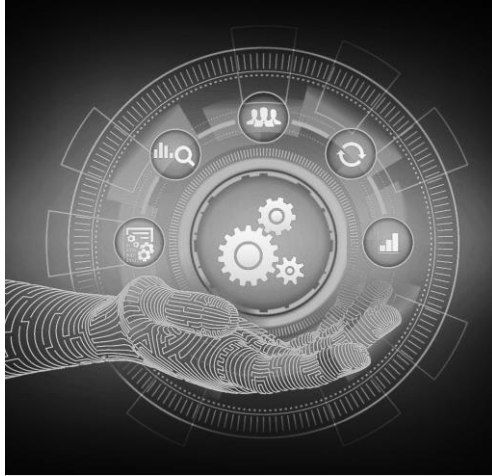
Write down the number when you figured out what is being described …

1. I have a box.

2. The box has a door on it.

3. The box can hold many different sized items.

4. The box can be found in a house.

5. Junk has a habit of collecting on the box.

From Data to Action: Example #2
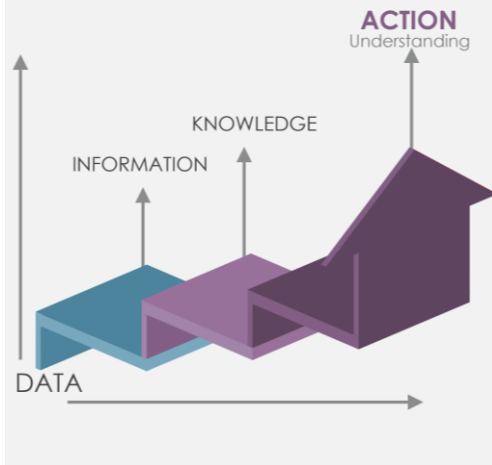
Write down the number when you figured out what is being described …

1. I have a box.

2. The box is 3' wide, 3' deep and 6' high.

3. The box has a door on it.

4. The box can be found in a house.

5. The box can hold many different sized items.

6. When you open the door, the light comes on.

7. Junk has a habit of collecting on the box.

8. It is colder inside the box than it is outside.

SOCIAL **IMPACT** ARCHITECTS

Data Rich, Insight Poor

DATA
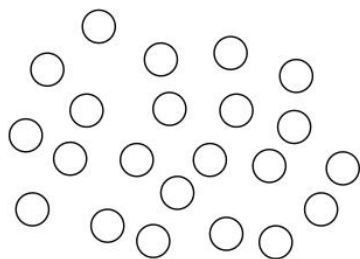
INFORMATION
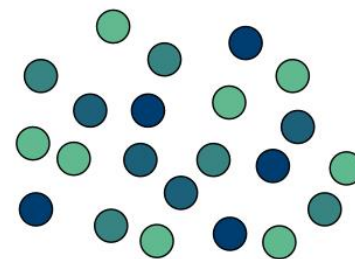
KNOWLEDGE

INSIGHT

WISDOM

IMPACT

SOCIAL **IMPACT** ARCHITECTS
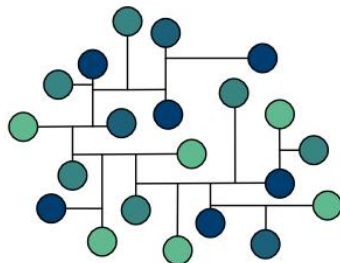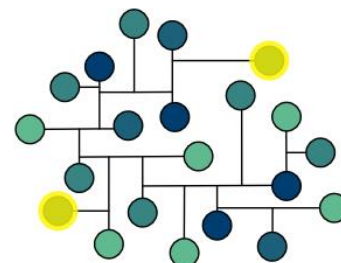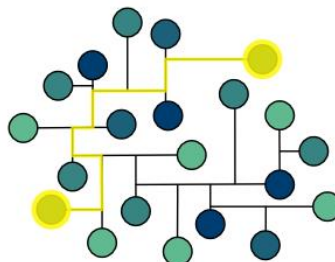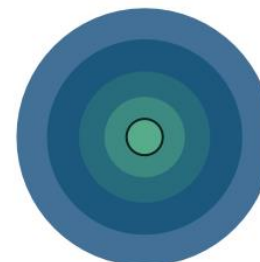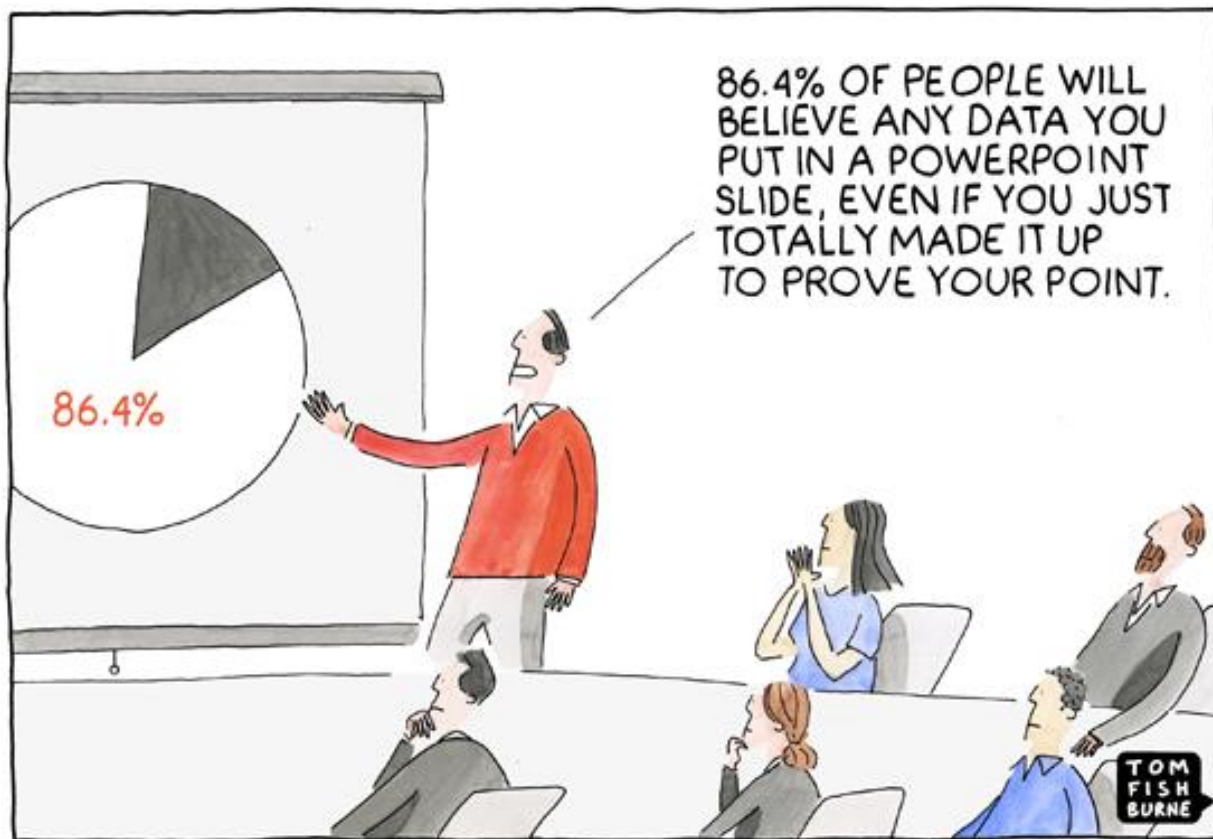
Data ≠ **Results**

SOCIAL **IMPACT** ARCHITECTS
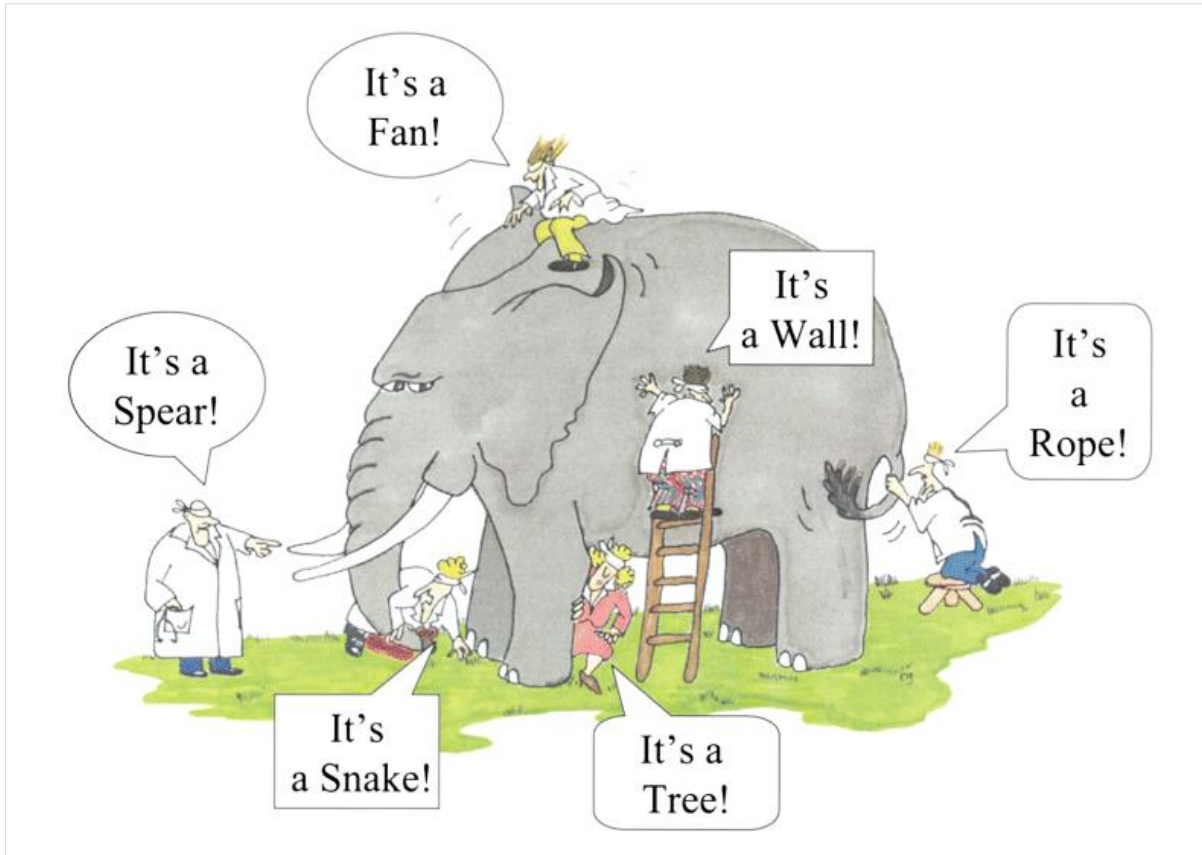
The Problem with Data

Iceberg Model:
Why Quantitative & Qualitative Data Is Better

THE **ICEBERG** EFFECT

THE WAY WE SAY WE WORK

- VISION 01
- 02 MISSION
- STRATEGY 03
- 04 GOALS
- VALUES 05
- 06 POLICIES

- CULTURE 01
- 02 MINDSETS
- BELIEFS 03
- 04 ASSUMPTIONS
- UNWRITTEN RULES 05
- 06 NORMS
- STORIES 07
- 08 PERCEPTIONS

THE WAY WE REALLY WORK

SOCIAL IMPACT ARCHITECTS

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Deep Dive: https://socialimpactarchitects.com/nonprofit-culture

SOCIAL **IMPACT** ARCHITECTS

Exercise

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ARCHITECTS
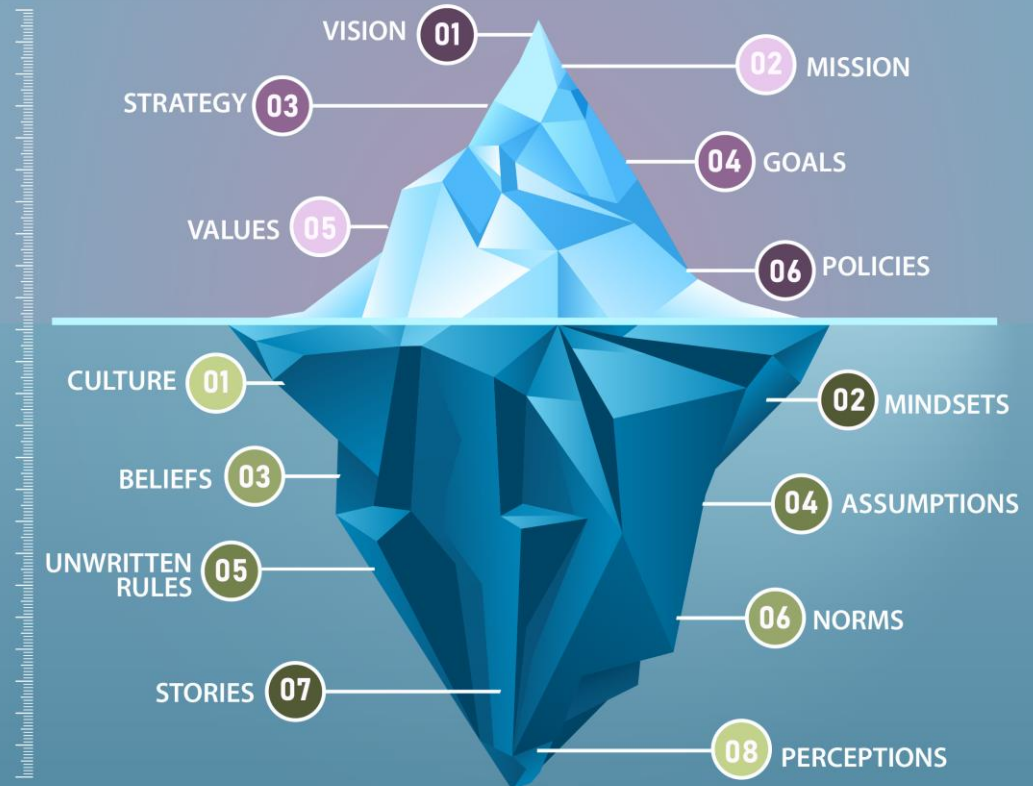
Brain Tricks

JUMPING TO CONCLUSIONS is when we make an assumption and accept that it is true without acknowledging that we are indeed making an assumption.

ANALYSIS PARALYSIS refers to over-analyzing (or over-thinking) a situation so that a decision or action is never taken, in effect paralyzing the outcome. There is no perfect information.

SATISFICING is the principle that in most cases people and organizations seek to obtain a satisfactory solution, not necessarily the optimum one.

SOCIAL IMPACT ARCHITECTS

Helpful Hints: Objectivity

SLOW DOWN THE PROCESS

TAKE TIME TO REFLECT

- What is the observable data? (If I had a video camera, what could I record and playback?)
- Does everyone agree on what the data is?
- Are you interpreting the data correctly?
- Can you explain the move from data to assumptions in a manner that everyone understands?

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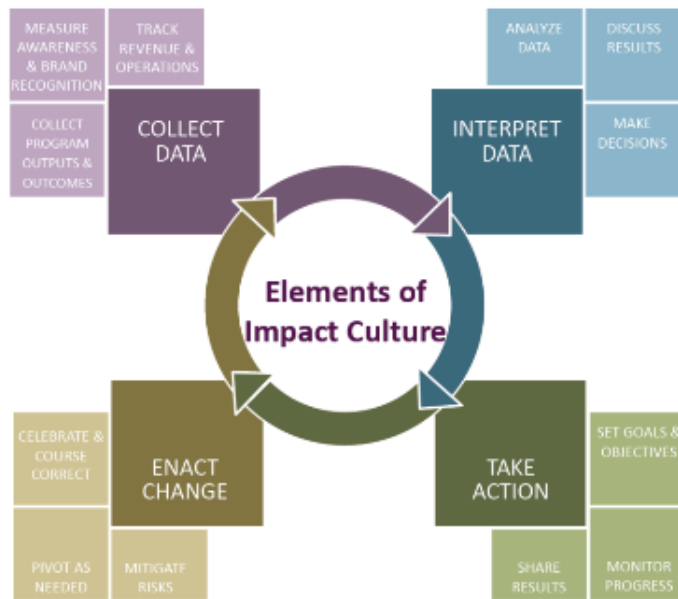
INSTRUCTIONS: Based on where you are in the **nonprofit lifecycle**, walk through each checklist item and ask yourself or your management team to gauge how embedded these elements are in your culture. Level 1 loosely correlates with the start-up phase; Level 2, the growth phase; and Level 3, the maturity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

Deep Dive: **https://socialimpactarchitects.com/impact-culture**

SOCIAL **IMPACT** ARCHITECTS

Organizational Checklist
For an Impact Culture

LEVEL 01 — *Organization Understands and Appreciates Why Impact Is Important*	LEVEL 02 — *Organization Proactively Designs & Measures Programs/Operations Using Best Practices*	LEVEL 03 — *Organization Champions Impact Management to Grow & Improve*
• 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.	• All Level 1 items are 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.	• All Level 1 and 2 items are 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.

Reflection

Consider **your program or organization** in considering these questions:

Is impact part of your culture? Why or why not? What can you work on?

Where does your brain let you down most? Least? What can you work toward in the next week/month to be more objective?

Chat #3

Word Association Game:
When I say "evaluation," what do you think about or feel?

WHY → WHAT → HOW
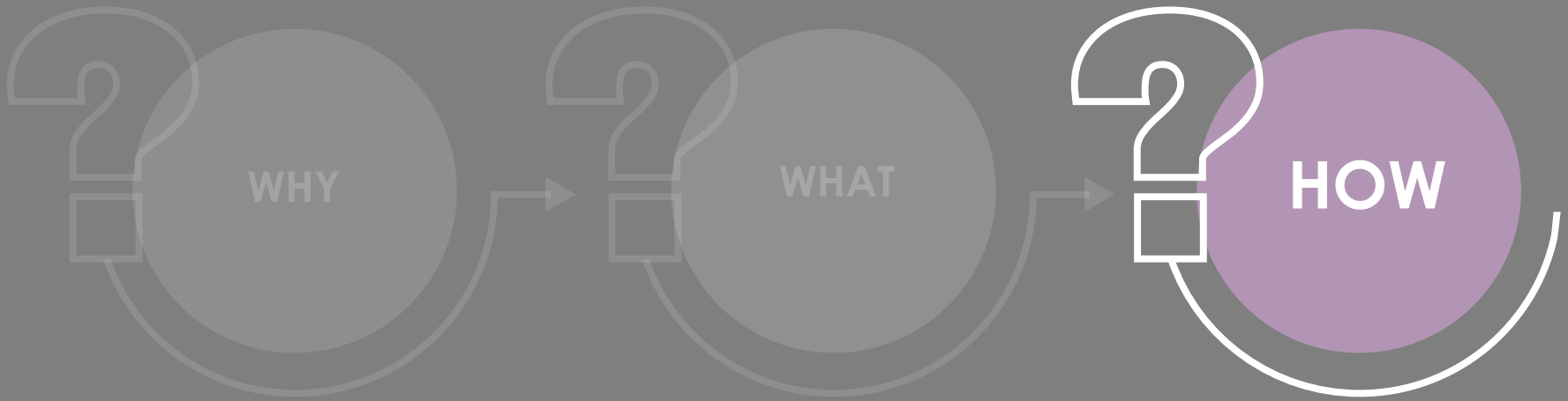
Impact Measurement Process
Continuous Process

Develop Theory of Change & Logic Model	**Develop Performance Indicators**	**Collect Data via Evaluation Plan**
1	2	3
Analyze Results	**Communicate Findings**	**Program Improvement**
4	5	

Theory of Change

Working hypothesis of **how and why** a desired change (intended impact) is expected to be achieved in a particular context.

The **cause-and-effect logic** by which the program model connects inputs, activities and outputs to generate desired outcomes and impact.

- Includes any **critical assumptions** inherent in the theory

Deep Dive: <u>https://socialimpactarchitects.com/theory-of-change</u>

SOCIAL **IMPACT** ARCHITECTS

Logic Model

1	2	3	4	5
Resources/ Inputs	Activities	Outputs	Outcomes	Impact
Certain resources are needed to operate your program.	If you have access to them, then you can use them to accomplish your planned activities.	If you accomplish your planned activities, then you will hopefully deliver the amount of product and/or service intended.	If you accomplish your planned activities to the extent you intended, then your participants will benefit in certain ways.	If these benefits to participants are achieved, then certain changes in organizations, communities or systems might be expected to occur.
Your Planned Work		Your Intended Results		

Deep Dive: https://socialimpactarchitects.com/logic-model

SOCIAL IMPACT ARCHITECTS

Cookie Exercise

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

SOCIAL **IMPACT** ARCHITECTS

Logic Model (or Recipe)

1 Resources/Inputs	**2** Activities	**3** Outputs	**4** Outcomes	**5** Impact

| Your Planned Work | | Your Intended Results | | |

SOCIAL **IMPACT** ARCHITECTS

Hilton ☰ 🔍   DOUBLETREE by Hilton   SELECT HOTEL BRAND ▼   URGENT MEDIA REQUESTS

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

For the First Time, DoubleTree by Hilton Reveals Official Chocolate Chip Cookie Recipe so Bakers Can Create the Warm, Welcoming Treat at Home

Hilton at Home: Insider tips to make your home more hospitable

April 9, 2020

SHARE

MCLEAN, Va. - For the first time ever, DoubleTree by Hilton is sharing the official bake-at-home recipe for the brand's beloved and delicious chocolate chip cookie, so at-home bakers can create the warm and comforting treat in their own kitchens.

The warm chocolate chip cookie welcome is synonymous with DoubleTree hotels worldwide, and travelers look forward to receiving one, fresh from the oven, upon their arrival.

DoubleTree cookies have a passionate fan following and a long history. More than 30 million are consumed every year, and the DoubleTree chocolate chip cookie even became the first food to be baked in orbit during experiments aboard the International Space Station.

RELATED ITEMS

Hilton

SELECT HOTEL BRAND

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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

40

Tool: Layered Logic 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 students 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

Reminder: Fun Samples

Another Cool Sample
Learning Cards

Test Card ☺ Strategyzer

| Test Name | Deadline |
| Assigned to | Duration |

STEP 1: HYPOTHESIS
We believe that

Critical: ⚠ ⚠ ⚠

STEP 2: TEST
To verify that, we will

Test Cost: Data Reliability: 👍 👍 👍

STEP 3: METRIC
And measure

Time Required: 🕐 🕐 🕐

STEP 4: CRITERIA
We are right if

Copyright Business Model Foundry AG   The makers of Business Model Generation and Strategyzer

Learning Card ☺ Strategyzer

| Insight Name | Date of Learning |
| Person Responsible |

STEP 1: HYPOTHESIS
We believed that

STEP 2: OBSERVATION
We observed

Data Reliability: 👍 👍 👍

STEP 3: LEARNINGS AND INSIGHTS
From that we learned that

Action Required: ☑ ☑ ☑

STEP 4: DECISIONS AND ACTIONS
Therefore, we will

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LEARN MORE:
www.strategyzer.com

Alexander Osterwalder and Yves Pigneur (2014). *Value Proposition Design: How to Create Products and Services Customers Want.*

Option: Performance Management
Performance Measures

QUANTITY	QUALITY
How Much did we do? (#)	**How Well** did we do it? (%)

Performance Management
Performance Measures

Effort

How hard did we try?

Effect

Is anyone better off?

SOCIAL **IMPACT** ARCHITECTS

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?	

Reflection

Consider your program/organization in considering these questions:

What is your (secret) recipe? How much is shared in the logic model? Could someone recreate it without a problem?

Are you practicing performance management? Why or why not? What might get in the way?

Developing an Evaluation Plan

Evaluation Plan
Written document that describes how you will monitor and evaluate as well as how you intend to use evaluation results for program improvement and decision-making.

Why?

Determine Why?
- Best performance indicators
- Level of resource intensity

What?

Develop What?
- Research questions
- Research methods

How and When?

Plan How and When?
- Roles & responsibilities
- Timeline

Deep Dive: https://socialimpactarchitects.com/market-research-secondary-research

SOCIAL **IMPACT** ARCHITECTS

Develop Why & What?

- **Clarify program goals & objectives**
- **Develop evaluation questions FIRST**
  - Planning & Implementation (How well did we plan?)
    - Who participated?
    - How did they find out about us?
    - Are we meeting participant and community needs?
  - Attainment of Objectives (How well did we met objectives?)
    - How many people participated?
    - What was the dosage/intensity (e.g. number of classes/hours/days)?
  - Participant Impact (How much and what kind of change occurred?)
    - What has changed?
    - Are participants satisfied?
    - What are the positive results? Any unintended results?
  - Community Impact (How much and what kind of difference has been made?)
    - Do the benefits of the program outweigh the costs?

Deep Dive: https://socialimpactarchitects.com/market-research

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Reminder: Secondary Research

Involves the summary, collation and/or synthesis of existing research

Common uses for secondary research:
- Program Design – best practices, lean startup
- Feasibility Studies
- Strategic Planning
- Storytelling – proxy research, SROI
- Constructing Primary Research Tools

Deep Dive: https://socialimpactarchitects.com/market-research-secondary-research

SOCIAL IMPACT ARCHITECTS

Example: Public Health
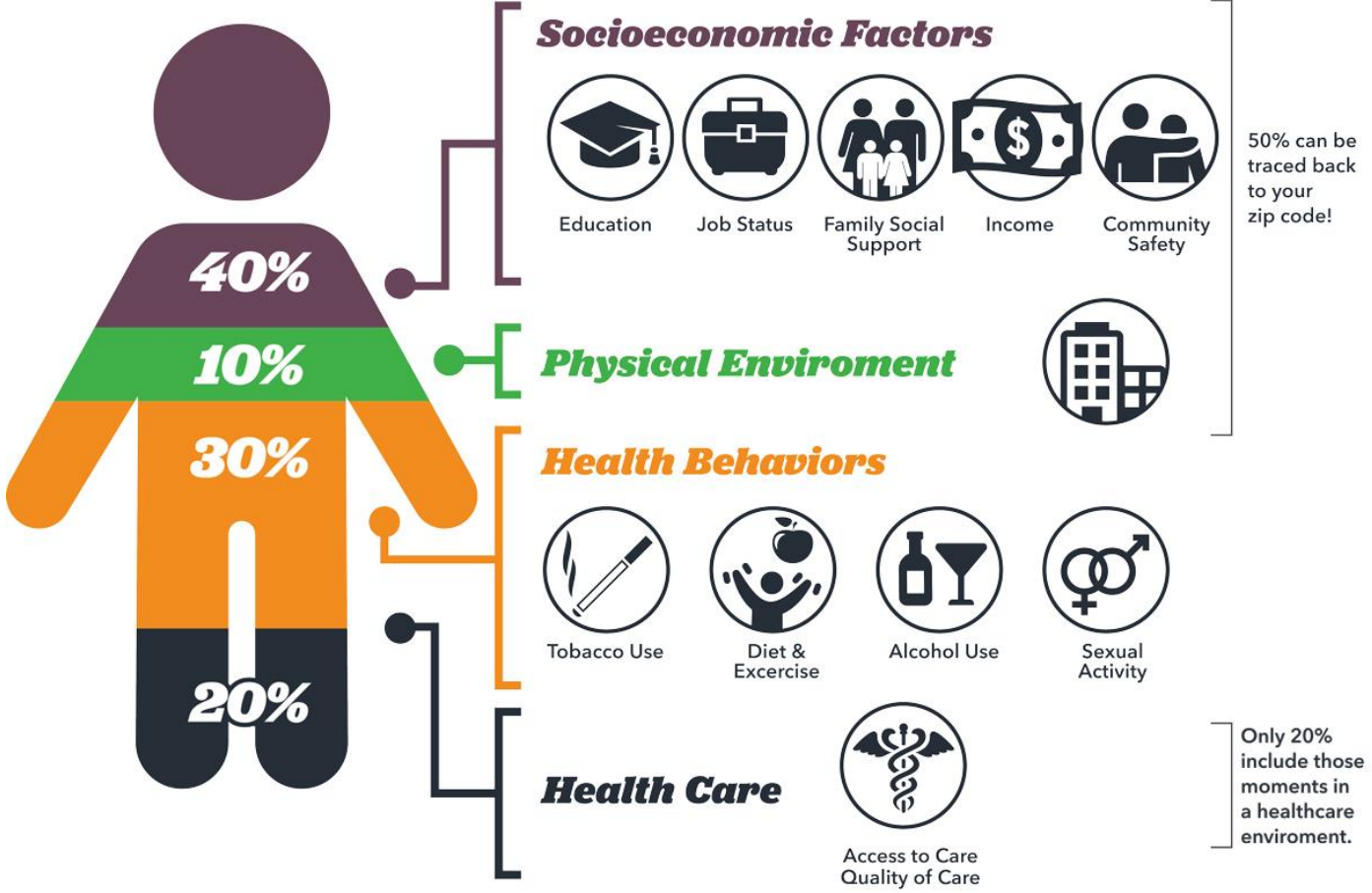
Source: Institute for Clinical Systems Improvement, Going Beyond Clinical Walls: Solving Complex Problems (October 2014)

Reminder: Primary Research

Allows you to reach conclusions based on a sample of population

WHERE TO START?
- Surveys
- Pre/Post Tests
- Interviews
- Focus Groups
- After-Action Reviews

RISKS/BENEFITS
- Fills any information gaps from secondary research
- Occurs both formally and informally
- Allows you to have direct interactions with key groups – potential customers, competitors and experts
- Can be expensive and time-consuming

Deep Dive: https://socialimpactarchitects.com/market-research-tools

SOCIAL IMPACT ARCHITECTS

Primary Research: Surveys

WHEN TO USE?	• Collect information on people's attributes • Collect information on people's attitudes
GUIDELINES	• **Survey Sample** – Obtain as representative a sample of participants as possible • **Number of Questions** – Ask only what is needed • **Language** – Use language participants will understand and avoid leading questions • **Incentives** – Use incentives to increase response rate
RESOURCES	• https://mn.gov/mmb/mad/resources/writing-surveys

Chat #4

Fill-in-the-Blank: What type of survey work do you do?

Plan *How & When?*

Capture the work via project plan

Evaluation Question	Indicator/ Performance Measure	Method	Data Source	Frequency	Responsibility

Analyze results

Monitor and adjust as needed
- Quarterly Review

Share results with stakeholders (e.g. annual report, website)

Example: Evaluation Plan
Principal Leadership Program Action Plan

Evaluation Tool	Objective(s)	Limitation(s)	Frequency
Confidence Survey	• Was the program effective in increasing principals' confidence in skills linked to student achievement?	• Confidence is not a robust or causal indicator for the ultimate impact the program aims to have on schools • Small sample size can skew results • Small scale can be misleading	• 2 times/year
Process Improvement Survey	• How can the program improve the curriculum for future participants?		• 1 time/month
Participant Interviews	• Was the program effective in increasing principals' knowledge and comprehension of skills linked to student achievement? • Are the program concepts principals implement in their schools having a positive effect on teacher development, organizational culture and school structure?	• Provides qualitative information the numbers cannot capture • Provides more holistic view of the impact the program has on participants	• Once when participant begins program • Then, annually at the conclusion of each level
Follow-up Survey	• Was the program effective in increasing principals' knowledge and comprehension of skills linked to student achievement? • Did participating principals implement critical program concepts in their schools?	• Self-reported increases in knowledge, comprehension and implementation may not be reliable and do not distinguish the degree to which participant has been successful	• 1 time/year

Tool: Dashboard

A dashboard is a series of INDICATORS tailored to an AUDIENCE who is going to USE them.

designed by freepik

Why would you use them?

- Data-based decision-making
- Actively monitor indicators

Deep Dive: https://socialimpactarchitects.com/nonprofit-dashboards

SOCIAL IMPACT ARCHITECTS

Quick Tips

Indicators are tailored to the users

Easy to use to make decisions (dependent on user)

Updated frequently (appropriate to user)

Ownership/accountability is clear

Forces your organization to USE YOUR DATA and makes evaluation part of your organizational culture at multiple levels

Reflection

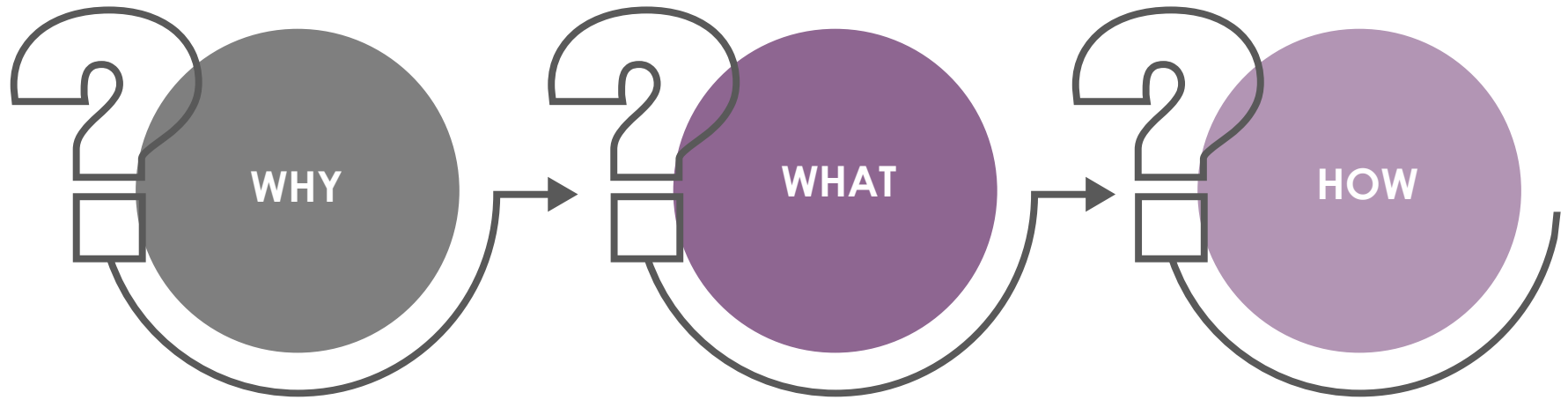Consider **your organization** when answering these questions:

How well are you planning your evaluation plan? Do you have a process in place? What is ONE THING you can do better?

?

Do you have a need for a dashboard to review change over time? What data is most important to include?

?

Extra Credit

WHY → WHAT → HOW

Tool: Impact Report

DEFINITION:
Although the names are sometimes used interchangeably, there are some differences between annual reports and impact reports. As the more traditional of the two, **an annual report features a full list of accomplishments, audited financials and a complete donor listing.** However, we find that many nonprofits are shifting to **an impact report, which is narrower in scope and focuses on the impact your organization has made in the lives of your clients and community.** Additionally, there are hybrid formats, which incorporate a blend of accomplishments, financials and impact.

- **Key Elements of Hybrid Model**
  - **Message from CEO & Board Chair**
  - **Theme / Anniversary (if relevant)**
  - **Key Accomplishments**
  - **Impact Goals & Diagrams**
  - **Impact Stories & Testimonials**
  - **Financial Snapshot**
  - **Donor List**
  - **Gratitude**
  - **Pictures**

Deep Dive: https://socialimpactarchitects.com/year-end-report

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Tool: Mission-Money Matrix

DEFINITION:
Mission-Money Matrix is visual tool that allows you to understand, discuss and strategically decide when it is best to pursue grants and other fundraising tools to support programs and events.
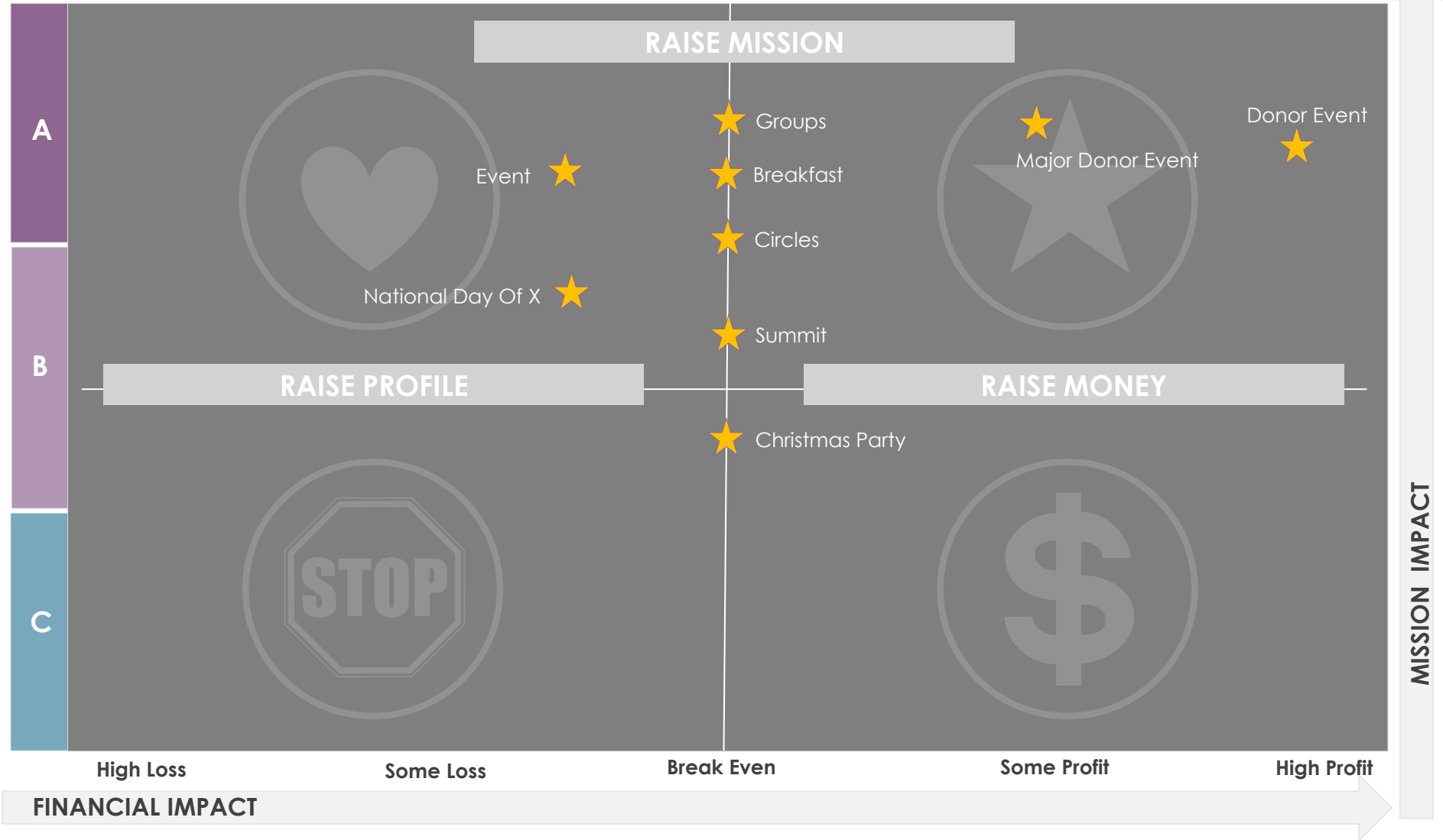
GOAL:
The goal is a portfolio mix that leverages different funding streams and maximizes impact for your clients and community. Through this process, you can increase program stability and reduce the impact of funding volatility.
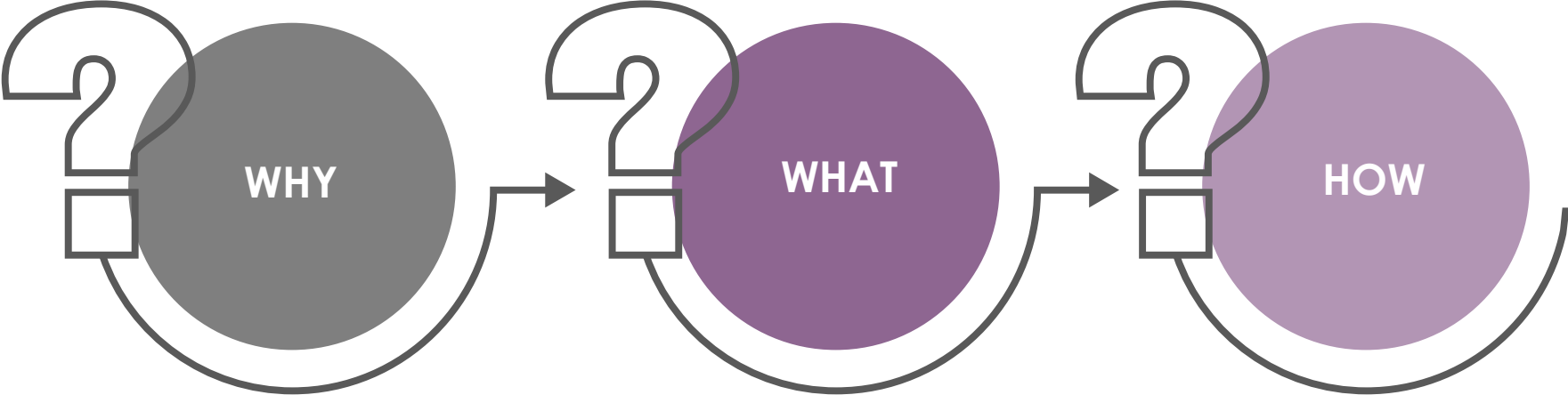
STEPS:

- **First**, identify your portfolio, which can include possible programs and events, other efforts, such as policy change, social enterprise and collaborations, and even fundraising events.

- **Second**, calculate net financial return, which will lead to a financial gain, loss or break-even in real numbers. Be sure to include both direct and indirect costs. We have found that a break-even analysis is the easiest way to produce a relative assessment in the portfolio.

- **Third**, evaluate mission impact – such as alignment, impact and reach (often found in your logic model). We have found that an A-C score is the easiest way to produce a relative assessment.

- **Fourth**, plot on the matrix with financial return on the horizontal and mission impact on the vertical.

Deep Dive: https://socialimpactarchitects.com/nonprofit-funding-priorities

Mission-Money Plot

RAISE MISSION

RAISE PROFILE

RAISE MONEY

A
B
C

Groups
Event
Breakfast
Circles
National Day Of X
Summit
Christmas Party
Major Donor Event
Donor Event

MISSION IMPACT

High Loss | Some Loss | Break Even | Some Profit | High Profit

FINANCIAL IMPACT

Q&A

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Want to **fast-track** your knowledge of the latest trends in the social sector? **Cut through the clutter** and subscribe today.

CHECK OUT THESE ADDITIONAL RESOURCES:

IMPACT CULTURE

IMPACT MINDSET

LEAN STARTUP

THEORY OF CHANGE

ACTIVITY TRAP

LOGIC MODEL

EVALUATION PLAN

Social trendSpotter
Latest Trends in the Social Sector

Our weekly blog, Social TrendSpotter provides you with the latest trends and ideas within the social sector. It merges current thinking with the edge of innovation to inspire, motivate and take action, so together we can create a better sector.

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Suzanne Smith, MBA

Suzanne Smith, MBA
CEO, Social Impact Architects
Adjunct Professor, UTA & SMU
Leadership Dallas – 2012
Leadership North Texas - 2013

Suzanne Smith, MBA serves as a coach and consultant for social organizations seeking to maximize the impact of their social strategies and achieve real, measurable results. For nearly three decades, she has generated innovative and breakthrough social ideas. With deep local and national social sector expertise, she has been widely recognized for her success in building and implementing award-winning programs and initiatives within the sector. **Suzanne holds an MBA from Duke University's Fuqua School of Business, where she was a CASE (Center for the Advancement of Social Entrepreneurship) scholar and studied under Greg Dees.**

Outside of Social Impact Architects, Suzanne is an **adjunct professor in the school of management at The University of Texas at Arlington and SMU.** She is also a member of the prestigious Society of Organizational Learning (founded by Peter Senge) and National Network of Consultants to Grantmakers. She is also honored to serve on the board of Aileron to help entrepreneurs go to the next level.

Suzanne also 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." She is frequently interviewed by regional and national media on social issues and social entrepreneurship and has published articles in Forbes, The Chronicle of Philanthropy, See Change, Nonprofit Business Advisor, Upstart and Grantmakers in Health. **For her outstanding work as a leading thinker, she was recognized with the Next Generation Social Entrepreneur Award by the Social Enterprise Alliance.**

Suzanne is a dedicated community leader and has worn many hats, including serving the City of Dallas on over 7 boards and commissions and working pro-bono/low-bono with many projects and nonprofits across North Texas. She is currently assisting the City of Dallas on the Dallas International District.

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.