


Scaling Impact Information Session

November 17, 2020

Facilitated by Josh Snider, Innoweave Program Officer,
McConnell Foundation





We would like to acknowledge
that The McConnell Foundation's
head office is located on the
traditional territory of the
Kanien'kehá:ka (Mohawk) people,
a place which has long served as
a site of meeting and exchange
among various nations.

Roadmap for our session

1. Innoweave's impact-oriented approach
2. Scaling Impact 101
3. Overview of Innoweave's Scaling Impact stream
4. Key factors for coaching readiness
5. Q&A and discussion

McConnell

- 80 year-old national family foundation.
- Major initiatives focused on building a more inclusive, sustainable, resilient, and innovative country, as well as reconciliation.
- Focus on social innovation.

McConnell

How do we define social innovation?

*Social innovation has **many definitions**, but at its core it supports people and organizations to **co-create, learn, adapt, and scale more effective solutions** to entrenched social problems—making our human and natural systems more adaptive and resilient.*

Innoweave helps organizations and collaboratives innovate

- The **scale and complexity** of the challenges the community sector is responding to are growing.
- Business as usual isn't enough to deliver the results we need.
- Innoweave helps community organizations:
 - Clarify their **Intended Impact and Theory of Change**.
 - Learn about, assess, and implement **social innovation approaches**.
 - **Generate greater impact**, more quickly, at less cost.

How we do this:

Social Innovation Implementation Coaching support

As a partner, Innoweave helps community organizations and collectives:

- **Select an approach:** Staff guidance to help understand and select the best social innovation approach(es) for your context and needs.
- **Become “coach-ready”:** Support to advance the ideas, plans, conditions, relationships, and commitment needed to successfully implement your chosen social innovation stream(s).
- **Engage a coach:** Financial resources to help engage talented coaches who can deepen your understanding and ability to implement your selected social innovation tool(s).

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New ideas may not be the answer

“When it comes to social innovation, I think we have more than enough solutions available to us already. The challenge is how to bring them to scale.”

-Al Etmanski

- Author, *Impact: Six Patterns to Spread Your Social Innovation*
- Catalyst behind Canada's Registered Disability Savings Plan
 - Co-founder, Planned Lifetime Advocacy Network (PLAN)
 - Fellow, Ashoka Canada

The need for scaling

“Identifying and scaling our best solutions has become the sector’s most important challenge. To meet that challenge, we can no longer evaluate programs simply based on how well they’ve performed in a given locality. Instead, we need to factor in their potential to achieve scale.”

- Steve Davis

- CEO, PATH

- Author, *Social Innovation: A matter of scale*

A common desire

- Social innovators who set out to solve complex social, economic, or environmental challenges often have one great hope—that if their new approaches turn out to be effective, they can be scaled to a larger level and have an even greater impact.
- Many want to extend their reach or to develop new offerings to complement their existing efforts.
- Some may want to expand their impact by changing parts of a system.

A complex endeavour

- In reality, Scaling Impact is often far more complex than we initially think.
- The process is rarely a linear enterprise in which changemakers finalize the conditions for scaling in one big push.
- Instead, it is likely to be a relentless, long-term process of adaptation and change.
- Scaling requires organizations to be serious about learning from both successes and failures, and to have the capacity to build on those insights moving forward.

Unique pathways

- Each organization needs to find its own unique strategy to achieve its Scaling Impact goals.
- It is highly context specific and can be challenging and time consuming.
- Scaling Impact often requires organizational changes, including new capacities, skills, and resources, as well as different relationships.
- It may also necessitate a willingness to let go of particular aspects of existing work and/or embrace an entirely new approach.

Types of scaling

- Depending on which resources you consult, there are a variety of Scaling Impact approaches organizations can employ to amplify their impact (either stand alone or in combination).
- Some of the most prominent of these include:
 - Scaling out
 - Scaling up
 - Scaling deep
 - ... among others

Scaling out: more beneficiaries

- Scaling out is the expansion of an existing program and/or its replication and adaptation in different contexts so that it reaches more people or regions, resulting in more beneficiaries.
- Examples of scaling out include:
 - An organization replicating a successful school-based program across many different school boards
 - A regional sustainability network that starts similar networks in other communities.

Scaling out: various models

- **Dissemination:**
 - Communications
 - Marketing
 - Distribution
 - Training
- **Branching:**
 - Replicating
 - Franchising
- **Licensing**
- **Affiliation:**
 - Federations
 - Networks
 - Associations
- **... among others**

Scaling out: various models

1 Dissemination

Resources

- Simplest, least resource-intensive
- Actively sharing information, with some technical assistance to bring an innovation to a new context

Control

- Low control
- Focus on advocacy and experimentation
 - Innovation spreads “like weeds”
 - Characteristics of a social movement

New org?

- Often occurs through existing organizations but can sometimes spark the establishment of completely new entities

- E.g., Fridays for Future

2 Affiliation

- Agreement to form an identifiable network to spread innovation
- Variety of models

- Flexible control
- Initiating organization stimulates growth through resource sharing among a network (money, technical assistance, communication, etc.)

- Can have affiliated initiatives, each with their own unique scaling strategies

- E.g., Canadian AIDS Society

3 Branching

- Remote sites often all legally part of one large organization or legally connected to a parent organization
- Requires greatest investment of resources

- High control
- Refining and sharing more of a good product
 - Innovation is contained
 - Focus is on ‘cloning’

- May require establishing new organizations to maintain control

- E.g., Enactus

Scaling out: increased range/depth of impacts

- Scaling out can also include developing new programs or activities to improve the depth and/or range of outcomes for the same beneficiaries.
- For example:
 - A youth mental health clinic that expands the variety of support services it offers to provide more complete care to their patients and generate greater outcomes for them.

Scaling up: influencing a broader system

- Scaling up often focuses on some of the root causes of problems by directing efforts toward changing the system that created the social or environmental problem.
- An organization trying to scale up might build on its past program- or organization-level success by working to influence policies, curricula, legislation, regulations, institutions, working relationships and/or the flows of financial resources in order to expand their innovation and/or impact.
- Opportunity to “punch above your weight.”
- Scaling up can take many forms. For example:
 - An environmental group that has been focused on creating urban green spaces can scale up its impact by working with governments to change regulations on urban planning.

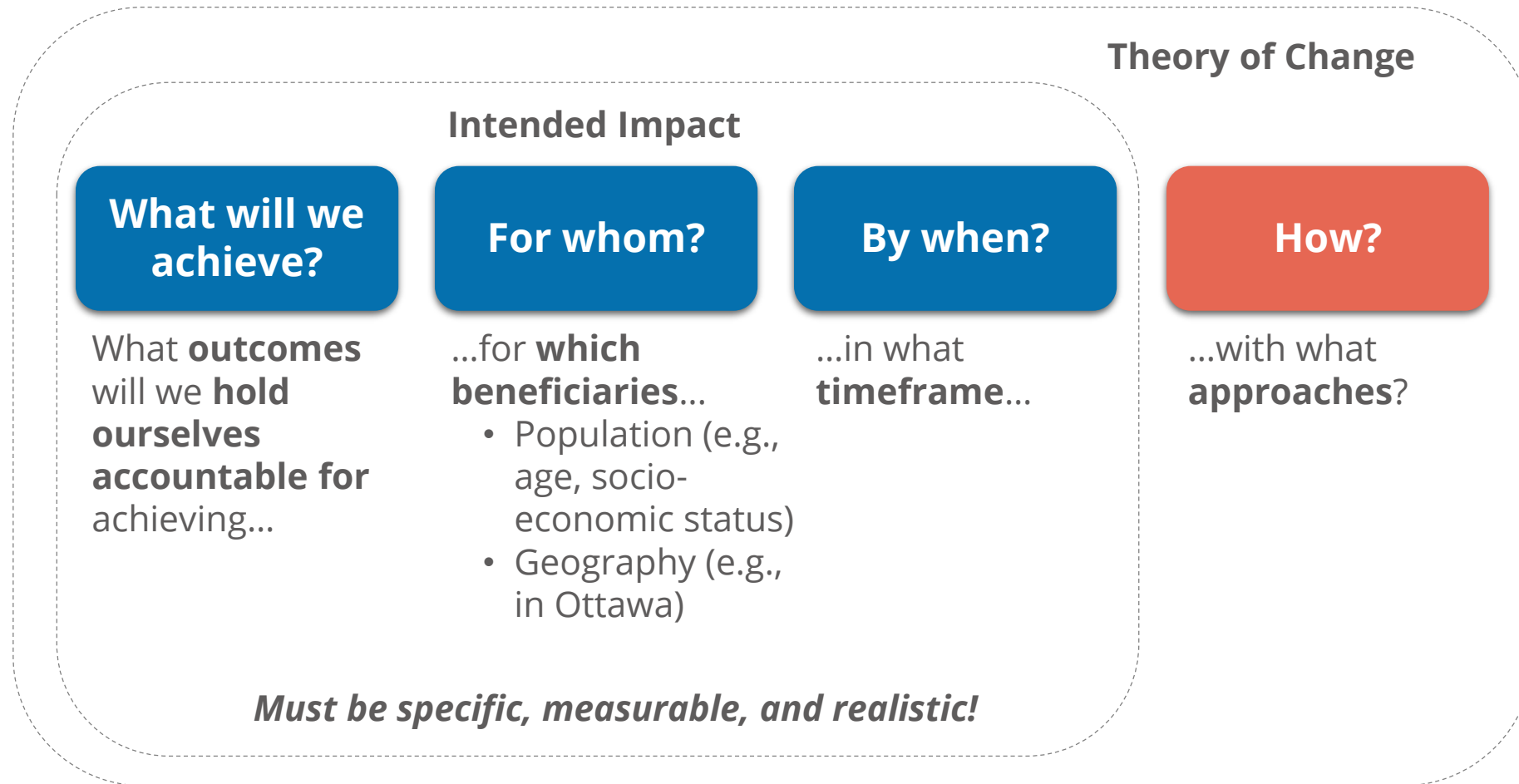
Scaling deep: culture change

- Changing the “hearts and minds” of people or the organization, system, or community (e.g., in terms of narrative, values, beliefs, and identities) so that the idea underlying the social innovation is supported and embedded.
- To shift cultural DNA by changing widely held societal values and norms.
- For example:
 - An organization that has exclusively provided personal support services for people with disabilities can scale its impact by trying to change cultural ideas about what it means to contribute and participate in society.

Scaling out, up, *and* deep: MADD Canada

- Mothers Against Drunk Driving Canada has employed all of these scaling techniques:
 - **Out:** Creating and supporting more MADD Chapters and Community Leaders across the country to reach more Canadians with their programming (106 at last count).
 - **Up:** Successfully advocating for stricter laws, regulations, and enforcement related to impaired driving.
 - **Deep:** Broadly educating the public about the dangers of impaired driving, leading to a fundamental shift in public attitudes and behaviours.

Theory of Change: Scaling can be a tool to generate greater impact



Other resources

- Innoweave Scaling Impact information page
- McConnell Foundation (various resources)
- SiG Knowledge Hub (various resources)
- Stanford Social Innovation Review (various articles)
- “Scaling Impact: A primer for nonprofits” - Informative resource from Ventureneer and the Social Impact Exchange
- “DIY Toolkit: Development Impact & You” - Practical resource from Nesta
- ... and many more local, regional, and international resources (as well as many available in French)

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Overview of the facilitated coaching model

Organizations/collectives execute the **work**, with extensive **facilitation by coaches**

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

Each organization/collective **crafts its own plan** with their coaches



A clear plan

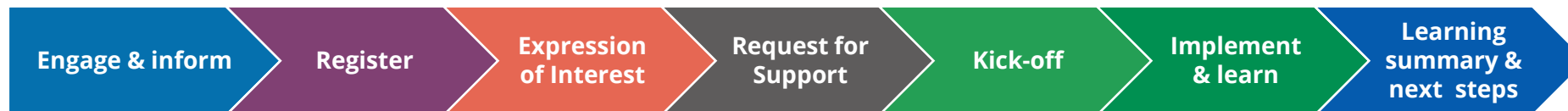


Increased skills



Innoweave has a database of self-identified coaches on our web site, but you can work with any coach you feel is a good fit, even if not listed. Innoweave will assess coach fit during the application process.

Scaling Impact user journey



Scaling Impact user journey

Engage & inform

- Innoweave's web site
- This info session
- Other resources in the scaling sector (web sites, webinars, workshops, books, etc.)
- Connect with Innoweave staff

Scaling Impact user journey



- Organizations need to Register on our **Online Portal:** www.innoweave.ca/portal.
- This Online Portal allows organizations to register their organization with their basic details and contact information.
- The Online Portal is the place where organizations can submit requests for support, view their status, share their learnings, and more.

Scaling Impact user journey



Expression
of Interest

- Groups will be asked to submit an **Expression of Interest** with the following information included:
 - Eligibility confirmation
 - Readiness assessment
 - Organization details
 - Project details
- Relatively few questions, up to 3 pages of open-ended responses, no attachments.
- Connect with Innoweave staff for support.
- Next deadline: **December 15, 2020**

Scaling Impact user journey

Request for Support

- Groups that have their Expression of Interest approved will be invited to complete Phase 2 of the application, a **Request for Support**. This phase includes:
 - Further project details
 - Challenge details
 - Request for support details (we welcome requests up to \$10,000, with 100% of funds directed to the coaching engagement)
 - Coach details
 - Learning plan details
- Relatively few questions, up to 3 pages of open-ended responses, no attachments, and no Project Plan template.
- Before submitting, groups are expected to connect with coaches to: assess mutual fit, co-create a Statement of Work, and confirm cost, interest, and availability.
- Connect with Innoweave staff for support.
- Next deadline: **February 1, 2021**

Scaling Impact user journey



Kick-off

- For groups that are approved, a kick-off call will be scheduled that includes your key project leads, your coach, and Innoweave staff.
- Clarify Innoweave coaching process.
- Review Statement of Work.
- Review learning plan and determine schedule for check-ins and sharing learnings.
- Discuss supplemental learning plan coaching support (as needed).
- Review terms of support and sign Letter of Agreement.
- Submit signed contract with coach.
- First 50% of funds distributed.

Scaling Impact user journey



- Begin coaching: Execute project plan and complete deliverables.
- Implement learning plan: Observe, learn, and pivot along the way.
- Share learnings, check-in with Innoweave staff (as determined during kick-off call).

Scaling Impact user journey

Learning
summary &
next steps

- Post-coaching learning summary.
- To complete the engagement and determine next steps, a wrap-up call will be scheduled that includes your key project leads, your coach(es), and Innoweave staff.
- Remaining 50% of funds distributed.

Learning-based approach

- At Innoweave, we want groups to shift away from evaluating simply to meet their perceived reporting needs for their funders.
- Evaluation should primarily benefit grantees, their beneficiaries, and the communities and important issues they serve.
- Groups that receive support from Innoweave will be encouraged to share how they reflected on their work, what they learned, and how they looped that feedback into program improvements to deepen their impact along the way.

Application dates

Expression of Interest deadlines:

Midnight PT on (or the first working day following)...

April 15

August 15

December 15

Application deadlines:

Midnight PT on (or the first working day following)...

June 1

October 1

February 1

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Key factors for coaching readiness

1. STRATEGIC CLARITY: Does your organization have a clear and shared definition of what impact it seeks to achieve and how your work generates this impact?

Key factors for coaching readiness

2. FOUNDATION OF SUCCESS: Has your organization proven its ability to generate impact and do you have a clear sense of what impact(s) you want to scale?

Key factors for coaching readiness

3. VISION OF INCREASED IMPACT: Does your organization know what it wants to achieve through a scaling plan, and have you considered potential scaling approaches/strategies?

Key factors for coaching readiness

4. TIMING: Does your organization want to develop a scaling strategy that can be implemented over the next 6-12 months?

Key factors for coaching readiness

5. RESOURCES: Do you have the time, energy and resources to manage the short- and medium-term costs (e.g., time, financial, and human) involved in scaling?

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Questions?

Thank you!

Please contact us if you have any questions or would like to provide feedback.

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