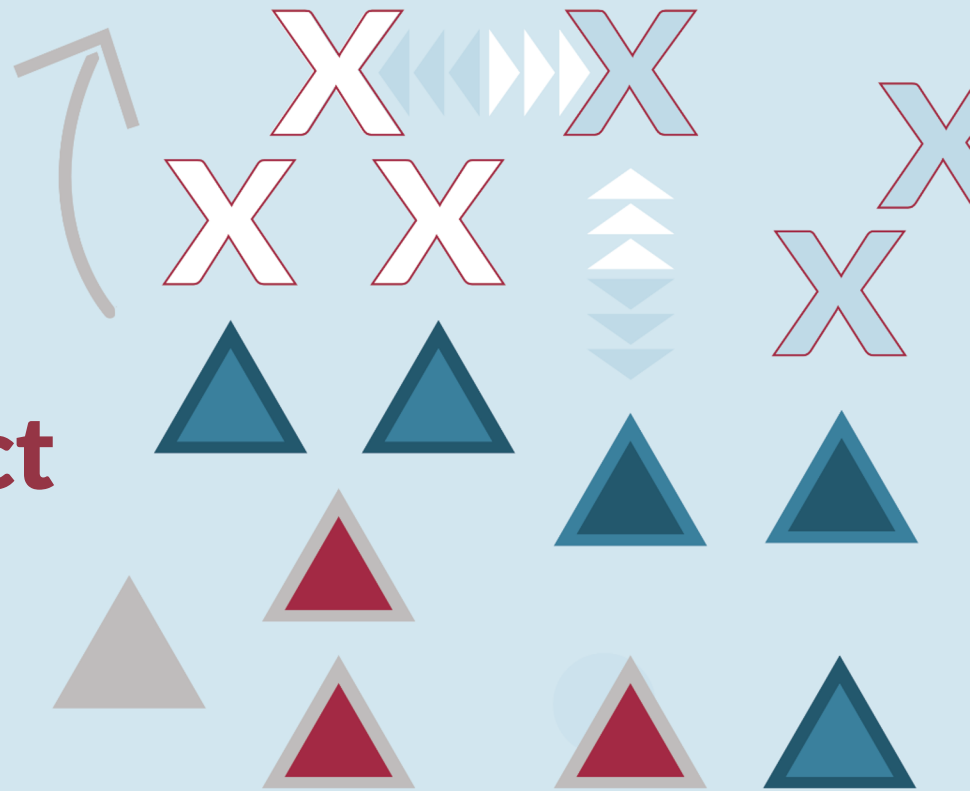


A Pragmatic Playbook for Impact

Direct, Widespread, and Systemic



Alex Cortez and Christine Wade • June 2022

Why this work ...

Organizations often grapple with how to close the **gap between their Direct Impact model and ultimate vision:**

Providing direct supports to some students to improve their outcomes.



Aspiring to live in a world where their model of support is ubiquitously provided.

Our goal is to help organizations think about how to employ a range of impact strategies to help them achieve their ultimate vision.

... and why now?

The need to fix inequities in our systems, supports, and outcomes is not new. However, the pandemic has increased both the **urgency and opportunity**:



The **need** has never been greater.



Education systems are under **incredible strain**.



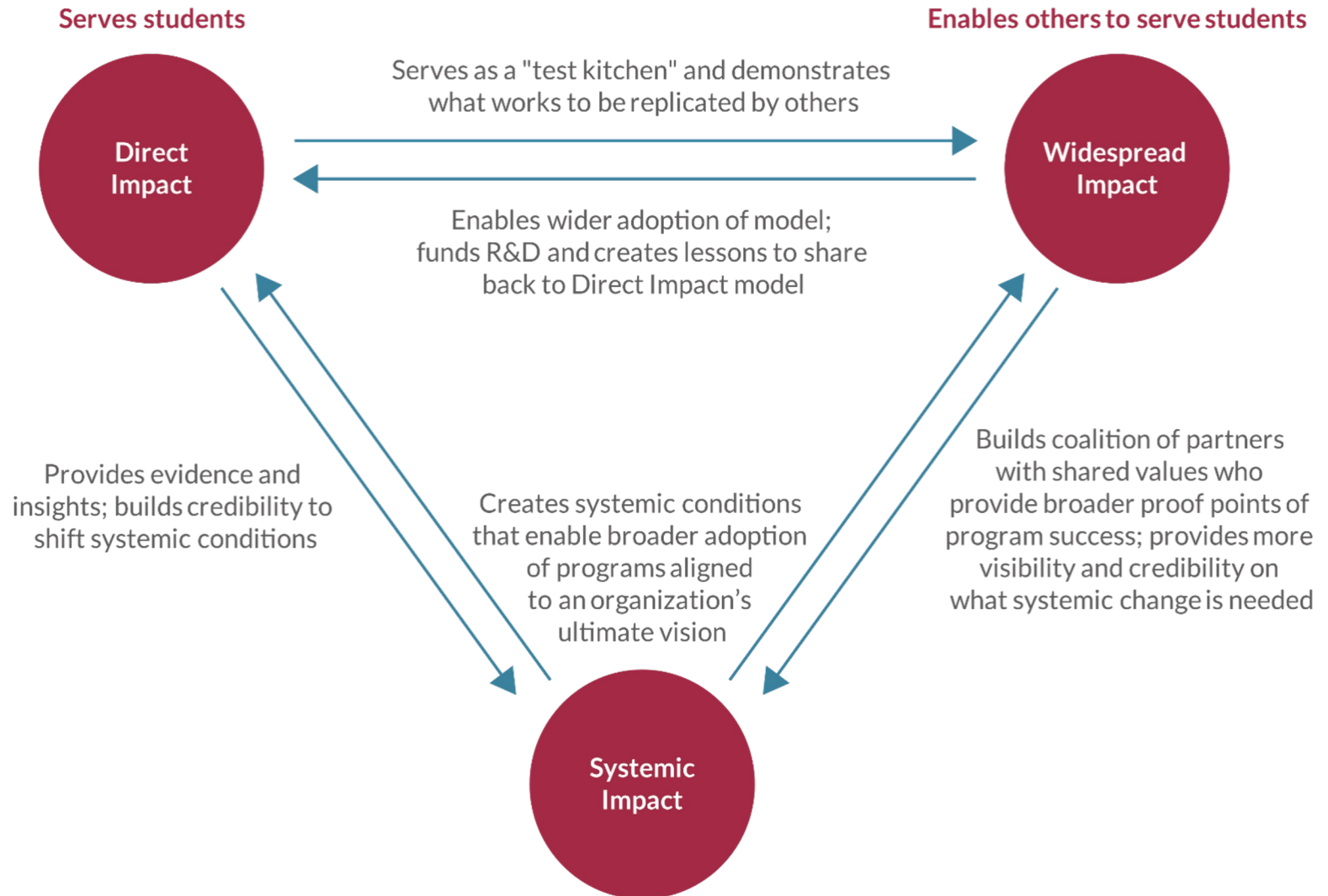
There has never been more **funding** available (but its timing is limited).

We explored how organizations employ three impact strategies to address both the needs of the moment and long-term transformation in education

DIRECT IMPACT	How an organization provides programming directly to its target beneficiaries.
WIDESPREAD IMPACT	How an organization builds the capacity of partners to implement elements of its program model.
SYSTEMIC IMPACT	How an organization shifts mindsets, relationships, and power to in turn shift policies, practices, and resource flows* to create stronger conditions for adoption of an organization's program model and/or its ultimate vision for change.

*Kania, Kramer, and Senge, "Water of Systems Change," https://www.fsg.org/resource/water_of_systems_change/.

These three strategies for impact are **NOT** mutually exclusive and in fact can reinforce each other



Pursuing a mix of these impact strategies can help create greater educational equity

DIRECT IMPACT	<ul style="list-style-type: none">• Provides supports to communities who want and need them.• Demonstrates that all students can succeed.• Serves as grounding for what to share with partners via Widespread Impact and what to advocate for via Systemic Impact.
WIDESPREAD IMPACT	<ul style="list-style-type: none">• Radically expands spread of strong practices to communities who want and need them.• Provides evidence-based resources to organizations who are often caught in a catch-22 of not receiving sufficient funding because they lack evidence and scale — while lacking evidence and scale because they do not receive sufficient funding.• Supports partners to customize and innovate programming to their local context and leveraging the assets of their communities.• Shares community-led innovation more broadly.
SYSTEMIC IMPACT	<ul style="list-style-type: none">• Disrupts existing conditions that have created and held racist and classist inequities in place, and creates and sustains new conditions that ensure successful innovations benefit all communities and funding is sufficient and then efficiently, effectively, and equitably distributed.

Why do many organizations start with **Direct Impact**?

Many organizations are **founded initially as a Direct Impact model.**

- They have an innovation that needs to be directly delivered and controlled to prototype, improve, and maintain quality.
- They want to remain proximate to the beneficiaries/communities being served and really understand their needs, create authentic relationships, and get direct feedback.
- They need to test different variations of their direct model.
- They need to build the evidence base of what works (and for whom and under what conditions).
- There is demand in the market to grow directly.

Some organizations **just focus on scaling Direct Impact.**

Within Direct Impact, there are a range of design choices organizations may vary in their model

Key elements that can vary in a Direct Impact model include (highlights):

- Target beneficiaries — who they serve (and how that drives other program variations).
- Program/curriculum/content provided.
- Dosage: duration, frequency, intensity of programming.
- Format: time, place, in-person versus virtual, live versus asynchronous — and/or hybrids of these.
- Mix of talent and technology employed.
- Ratio of beneficiaries to staff in programming.
- Source of staff talent (who, how hired/trained/managed, and how paid).
- Caseload of staff.

Orgs often vary key elements of their Direct Impact program model to:

- Increase impact and/or create efficiencies in the ratio of effort to outcomes (e.g., ROI).
- Respond to changing conditions and beneficiary needs (e.g., shift to virtual because of COVID-19).
- Better respond to needs of different markets and increase ability to grow, including being responsive to the specific needs of different communities and subsegments of beneficiaries.

These variables also inform the design of Widespread Impact **AND** Systemic Impact models by demonstrating what works, for whom, and with what trade-offs in effort to outcomes.

Some organizations experience limits in growing their Direct Impact

- Some are facing **Direct Impact fatigue**, because growing via Direct Impact is hard in general and even harder during COVID-19. Some organizations face limits on their desire to build organizational complexity, talent pipelines, and larger systems/structures.
- Some are facing **limits on funding and/or limits on size of fundraising** an organization wants to commit to long term.
- Some are facing **limits on the market's willingness to purchase** (versus wanting to own themselves) — or conversely, the potential for whole new markets that can be accessed ... but not via Direct Impact.
- Some are facing **limits based on systemic conditions** — political and/or policy barriers.
- And/or some organizations **simply aspire to a speed or overall scale of growth** that their Direct Impact model simply *cannot* provide (but which may require trade-offs, as we'll discuss in the next section).

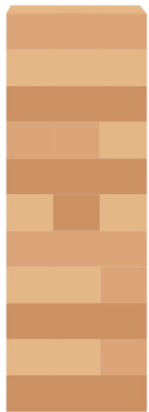
"We can never be our best selves and achieve our greatest impact by only growing through Direct Impact."

—Alan Safran, Saga Education

Widespread Impact requires organizations to think about a process of “high-impact Jenga®”

- Widespread Impact is a strategy for how an organization **builds the capacity of partners to implement** elements of its program model.
- This strategy requires organizations to **go through a process of “high-impact Jenga®”** to determine what elements of its Direct Impact model it wants its partners to replicate and what’s required to make that successful (and not misaligned).

Direct Impact Model



Widespread Impact could be a piece of the model...



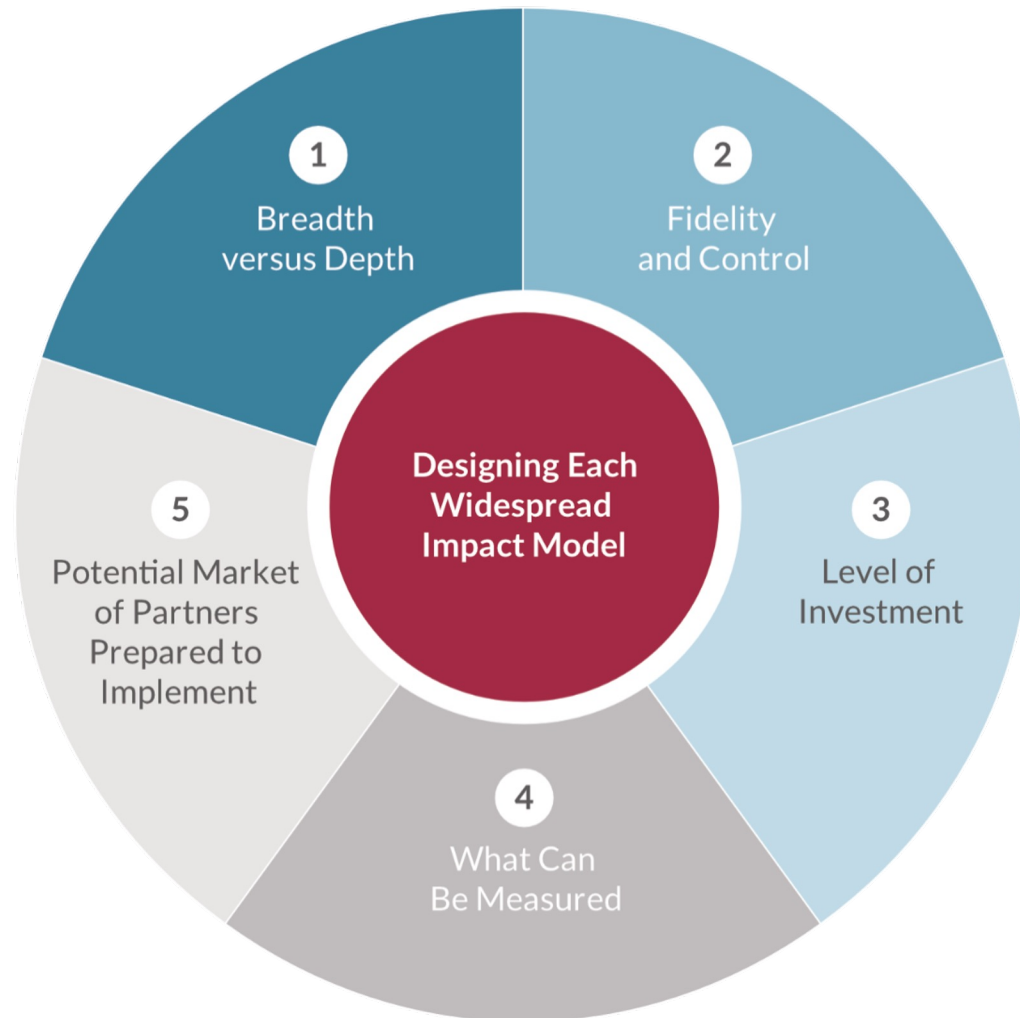
...Or could be a lot of the model...



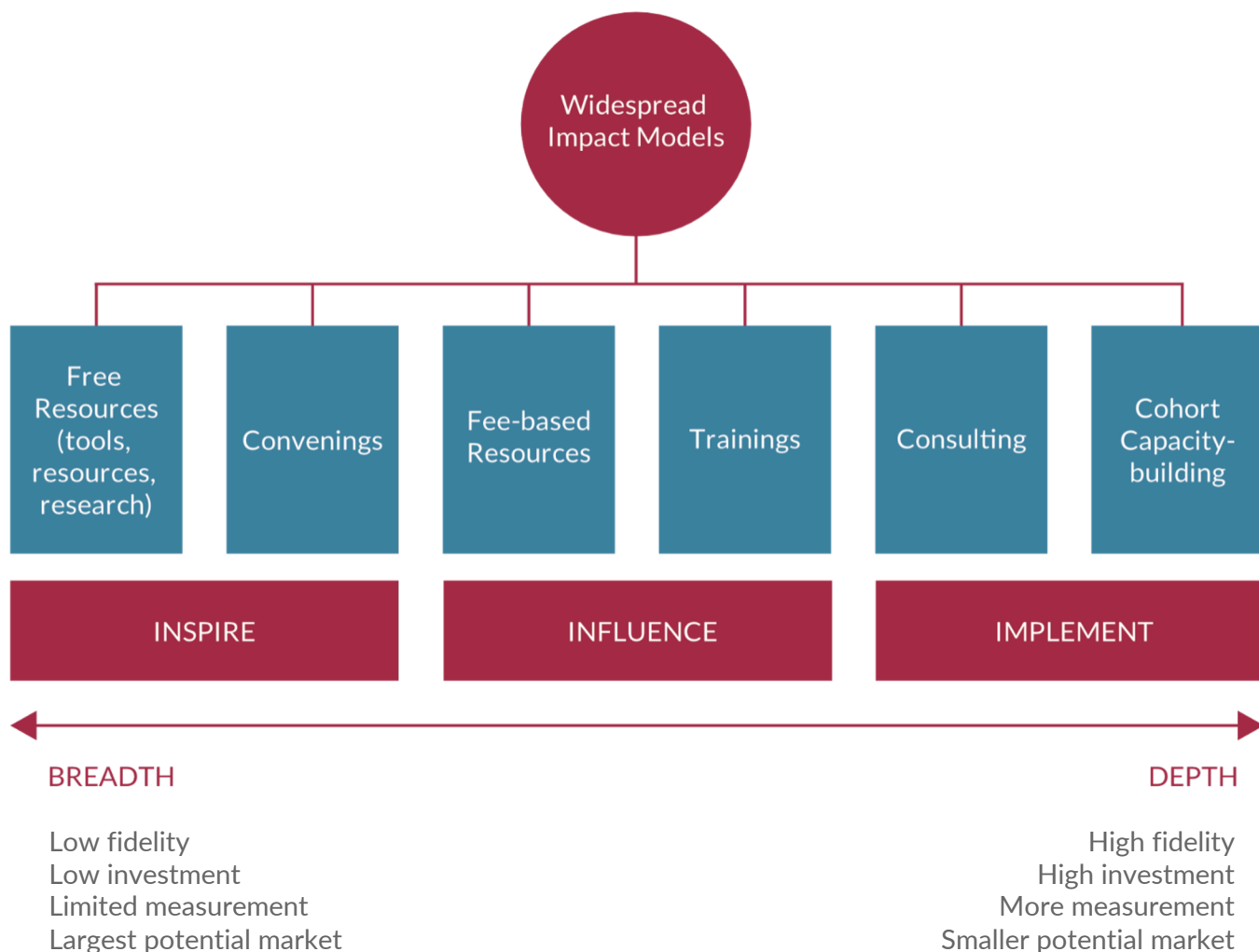
...But expectations and resources can't misalign with ability to implement.



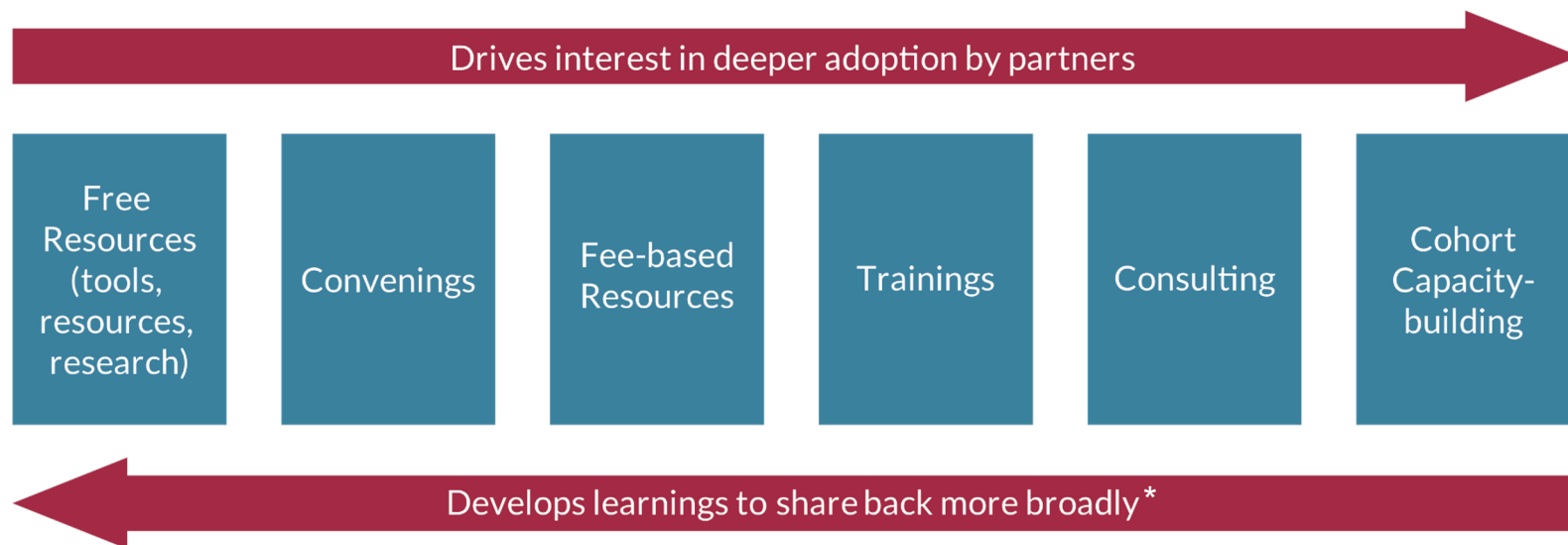
“High-impact Jenga®” requires organizations to make and align decisions across the following trade-offs



Organizations can pursue a wide range of potential Widespread Impact program models



These program models are not mutually exclusive and can in fact be mutually reinforcing



*Also, can inform continuous improvement of Direct Impact models.

Strong practices in delivering Widespread Impact models focused on deeper implementation

VALUES, RELATIONSHIPS, AND CHANGE MANAGEMENT

1. Align on **values**, but be prepared to shift **mindsets**.
2. Set **clear expectations** to enable implementation.
3. Build **buy-in and sponsorship across both senior leadership and grassroots** to sustain long-term support for implementation.
4. Develop **realistic timelines** for engagement to support partners.

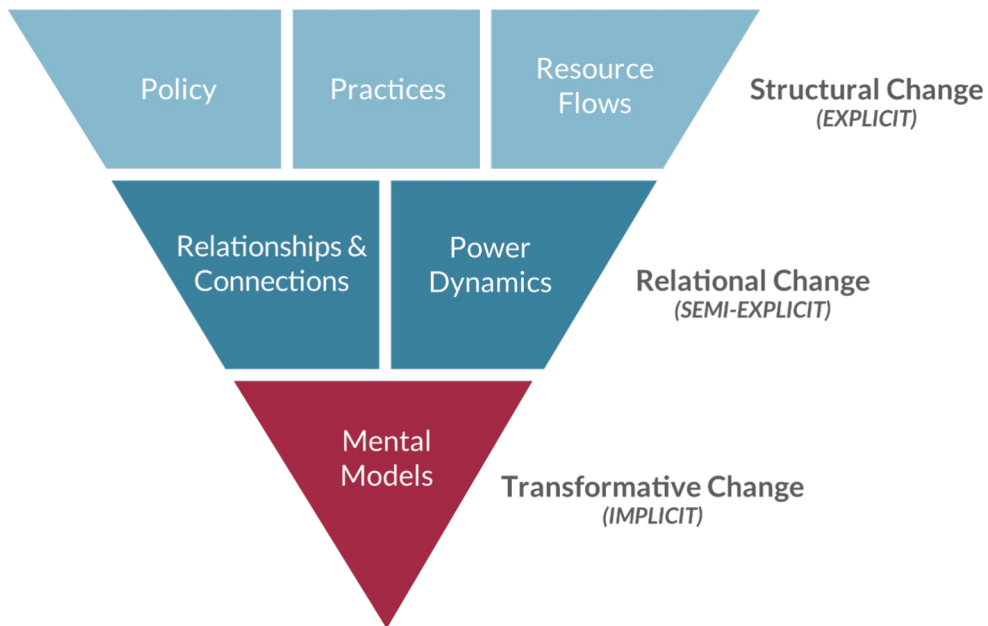
PROGRAM MODEL

1. Decide between a **“lightsaber”** (a tool/resource) and the **“Force”** (holistic program adoption) in prioritizing what partners implement first.
2. Define **non-negotiables** and then explicitly create **space for partners to customize and innovate** to meet the needs of their communities.
3. Provide **data systems** to help partners implement program model and to use measurement to manage and maximize performance.
4. Provide **technology tools** to help partners implement program model and amplify talent.
5. Continually **observe and ask for feedback** about where partner organizations are getting stuck on program model implementation.

Systemic Impact is about shifting mindsets, relationships, and power to shift policy, practice, and resource flows

We approach Systemic Impact leveraging FSG's framework*

Six Conditions of Systems Change



When designing Systemic Impact strategies, organizations should consider:

Meta question: What role and leadership do **communities** most impacted by education systems have in setting the agenda for changing those systems?

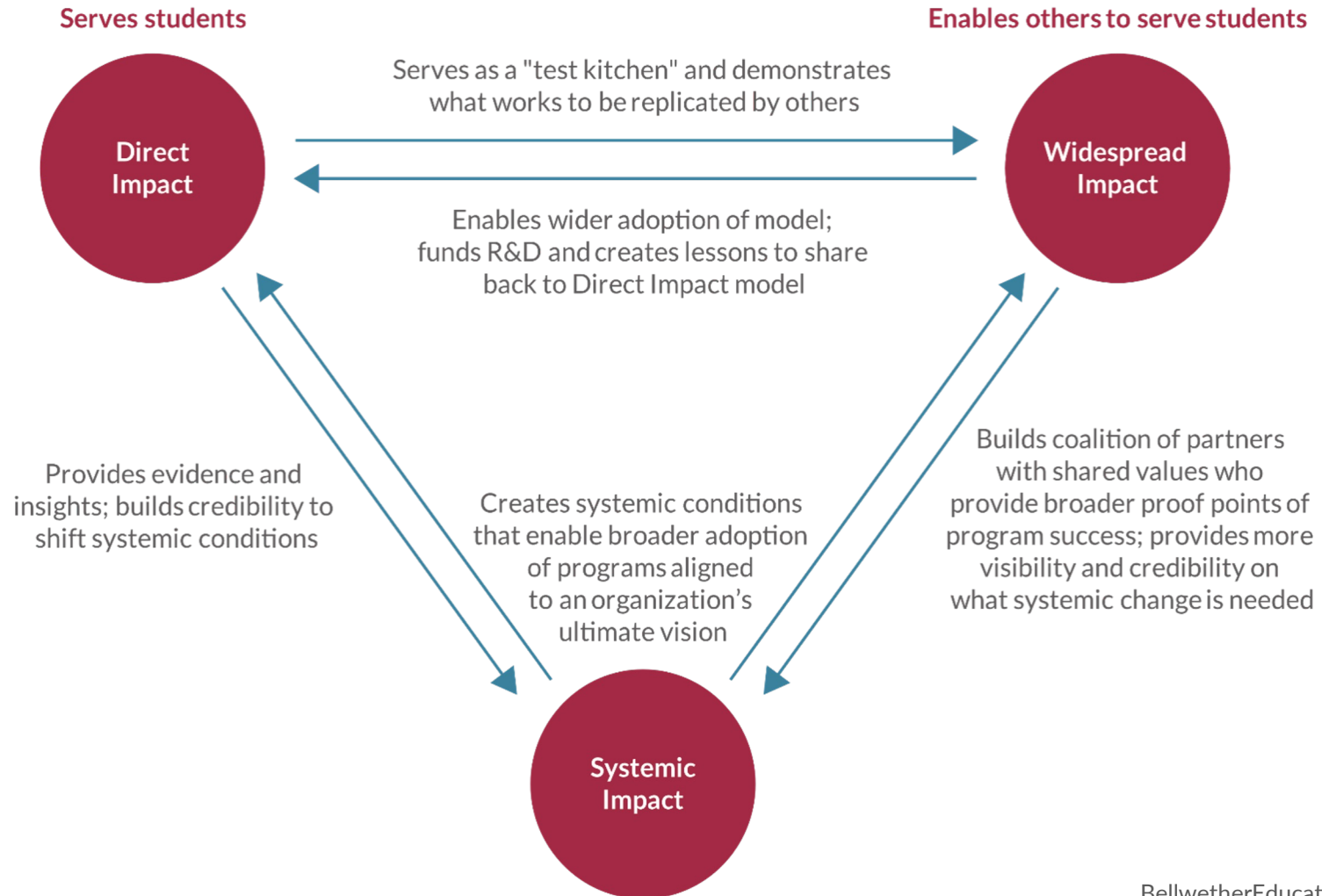
1. **Which systems** does an organization seek to influence?
2. **What changes** does an organization want to achieve for a given system? What is the agenda?
3. **How are those changes achieved**, and who has to be influenced to achieve them?
4. **Who else needs to be involved** and in what role for changes in a system to be created and sustained?

*Kania, Kramer, and Senge, "Water of Systems Change," https://www.fsg.org/resource/water_of_systems_change/.



How Impact Strategies Are Mutually Reinforcing and Can Be Balanced

Each impact strategy is individually powerful. Organizations have also found mutually reinforcing power when pursued in combination.



Organizations must balance time, energy, and resources across the three impact strategies

- As organizations look to move beyond Direct Impact into Widespread and Systemic Impact, they're suddenly faced with bigger questions around prioritizing time, energy, and resources between and across the three strategies.
- Organizations can consider three areas when deciding how to balance across all three impact strategies:

1

INTENDED IMPACT, THEORY OF ACTION, and THEORY OF CHANGE

2

ORGANIZATIONAL CAPABILITY

2

FINANCIAL SUSTAINABILITY

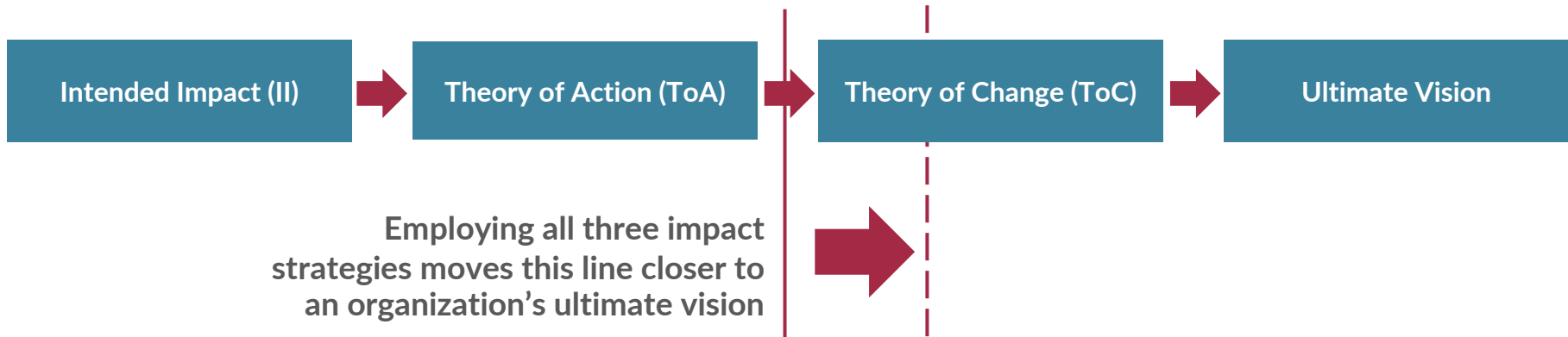
1

What do we mean by Intended Impact, Theory of Action, and Theory of Change?



1

Organizations employing all three impact strategies can expand their Theory of Action closer to their Theory of Change



- **Widespread Impact:** (a) builds a coalition of partners with shared values who provide broader proof points of program success, and (b) provides more visibility and credibility on what systemic change is needed.
- **Systemic Impact** explicitly takes on creating population-level conditions required to achieve vision through shifting mindsets, relationships, and power to influence policy, practice, and resource flows.

"We are a small technical service provider that has, like many others, an ambitious mission statement that's thinking about every child in America, especially those who are least served right now ... We've been thinking a lot about how our theory of action can be better scaled ... which is what led us to our Widespread Impact work." —Justin Wells, Envision Learning Partners

Organizations must consider implications to **organizational capability** in expanding to all three impact models

CULTURE

- Acknowledge that organizational **mindsets and capacity** to execute the three strategies can be very different.
- Provide team with a **common “why”** and **clarity on how to prioritize** within and across impact strategies.

“There’s a strong cultural and organizational transformation that needs to happen from focusing on direct work to capacity-building work.”

—Oscar Cruz, Citizen Schools

STRUCTURE/ CAPACITY

- Expanding into multiple strategies is **not a zero-sum game of resources**; capacity and learnings driven by one strategy often support the others.
- **Building out separate teams** is valuable, but it's important they **share DNA**.
- **Executive oversight** is critical to ensure each impact strategy is individually successful yet also collectively aligned.
- Organizations do not need to take everything on themselves — they can work in **partnerships and coalitions**.
- Organizations can pursue a **merger or acquisition** to bring new capabilities in-house.

“The added capacity that was brought in to build out our Widespread Impact allows us to raise the bar for our Direct Impact work in our schools. Learning happens in both directions.”

—Todd Dickson, Valor Collegiate

“Our Chief Impact Officer’s whole-scale responsibility is to oversee the interaction of our three impact models, how they build upon, learn from, and grow from each other.”

—Jaclyn Piñero, uAspire

Organizations must consider **financial sustainability** within and across impact strategies

DIRECT IMPACT

- May require making **trade-offs** to reach a **price point** stakeholders can fund without philanthropic support.
- May not ultimately be financially scalable, spurring expansion into Widespread and Systemic Impact.

"It was really clear to us after many, many years that our Direct Impact program was not a financially scalable model."

—Anonymous CEO

WIDESPREAD IMPACT

- Choice in model may depend on **funder willingness to support breadth versus depth**.
- Many models designed to **generate revenue from partners**.

"Widespread Impact can support Direct Impact with revenue, and Direct Impact can support Widespread with reputation."

—Alan Safran, Saga Education

SYSTEMIC IMPACT

- Necessary to ensure sector-wide **funding is sufficient and then effectively, efficiently, and equitably deployed**.

"Systemic Impact can be the ultimate business development."

—Anonymous CEO

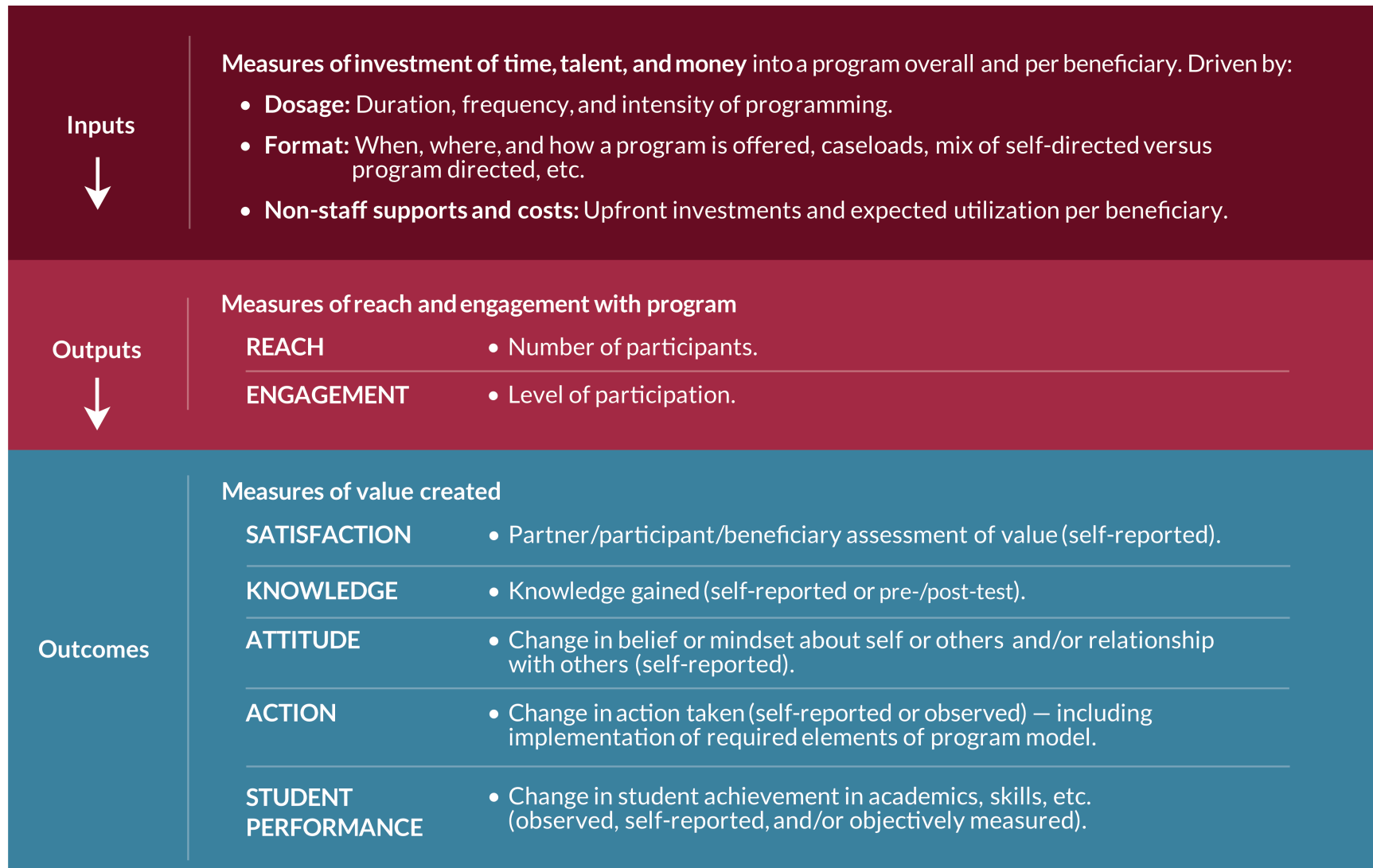


Measurement Overview for Widespread Impact

Measuring impact is important to different stakeholders for different reasons

Organizations Providing Widespread Impact	Widespread Impact Partners	Funders	Policymakers
<ul style="list-style-type: none">• Planning, setting priorities, and properly resourcing those priorities — in strategic planning and on an ongoing basis.• Managing and maximizing execution.• Learning.• Attracting allies, partners, and resources.	<ul style="list-style-type: none">• Managing expectations of commitment.• Managing and maximizing execution.• Learning.• Making the case for funding/prioritization internally and attracting external resources.	<ul style="list-style-type: none">• Understanding impact.• Learning alongside grantees.• Unlocking more funding.• Better structuring that funding (time-frame, level of restriction).	<ul style="list-style-type: none">• Understanding what impact is possible.• Understanding how that impact can be achieved/what program models should be supported.• Equipping them with what they need to make the case on policy.

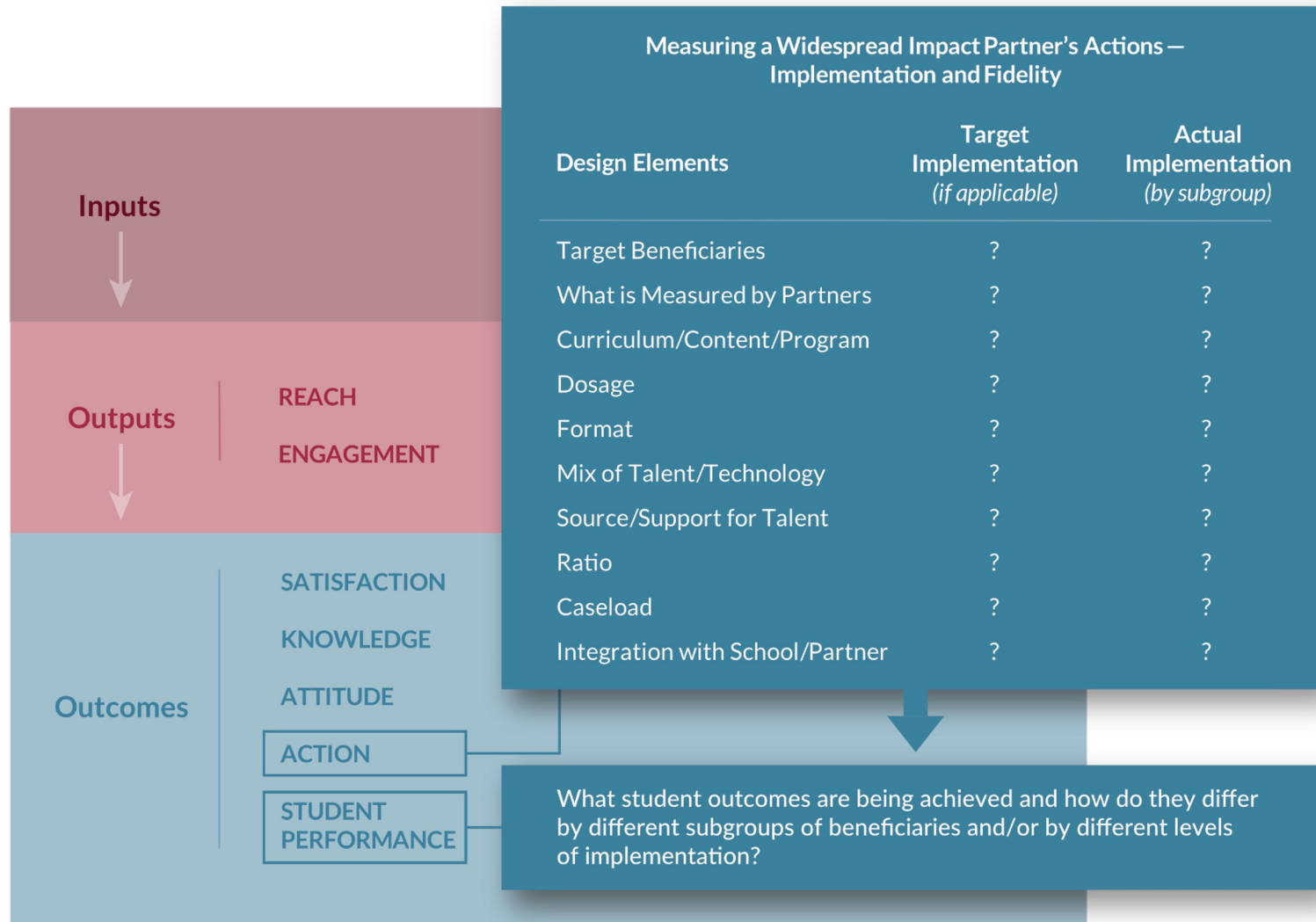
Organizations need to think about measurement at three levels



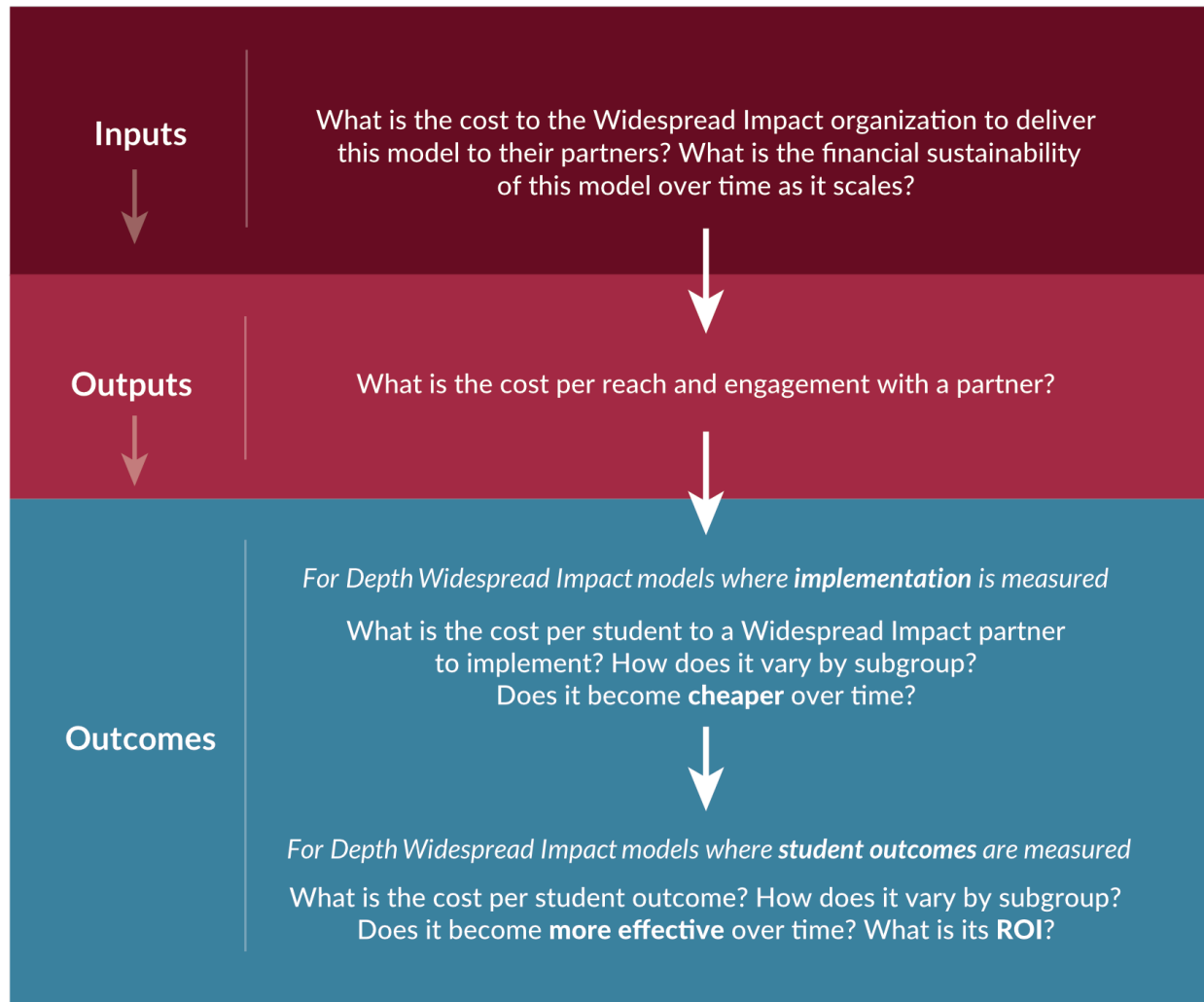
What usually can and cannot be reasonably measured by Widespread Impact model

	Free Resources (tools, resources, research)	Convenings	Fee-based Resources	Trainings	Consulting	Cohort Capacity-building
INPUTS	X	X	X	X	X	X
REACH	X	X	X	X	X	X
ENGAGEMENT	X	X	X	X	X	X
SATISFACTION	X	X	X	X	X	X
KNOWLEDGE				X	X	X
ATTITUDE				X	X	X
ACTION					X	X
STUDENT PERFORMANCE			If resource is a data platform with data-sharing agreement		If part of agreement	If part of agreement

Measuring Implementation and Fidelity



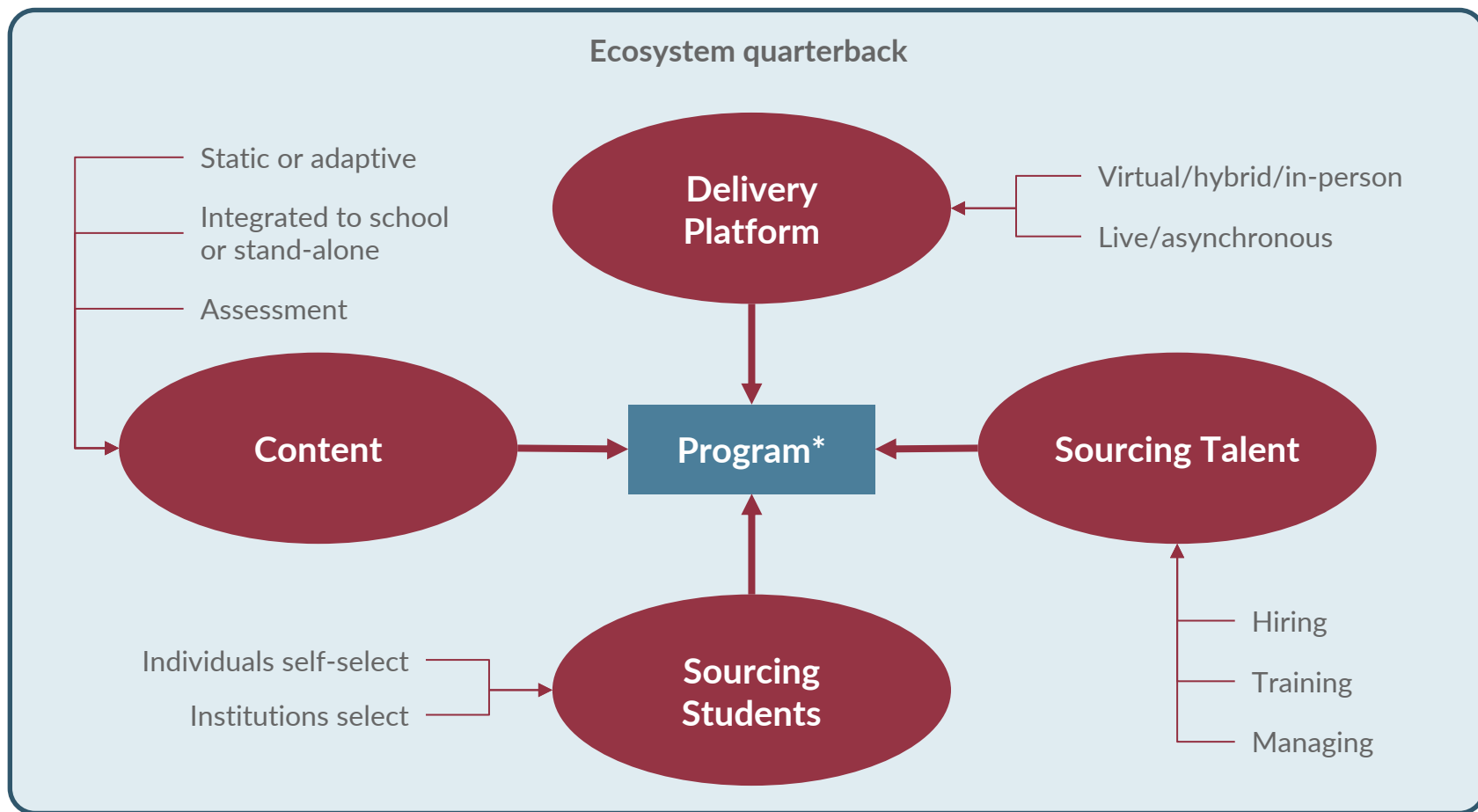
Organizations need to also think about measuring cost in relation to inputs, outputs, and outcomes for Widespread Impact



Place-Based Perspective

Instead of a single source, some schools will need to “assemble” a collection of specialist Widespread Impact partners to execute a program model

Example of Tutoring (but could be applied to other programs)





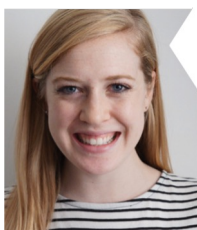
Thank You

About the Authors



Alex Cortez

Alex Cortez is a partner at Bellwether Education Partners in the Strategic Advising practice area. He can be reached at alex.cortez@bellwethereducation.org.



Christine Wade

Christine Wade is an associate partner at Bellwether Education Partners in the Strategic Advising practice area. She can be reached at christine.wade@bellwethereducation.org.

Acknowledgments

Thank you to New Profit and the Bill & Melinda Gates Foundation for their financial support of this project. We would also like to thank the many individuals who gave their time and shared their knowledge and feedback with us to inform our work on this project. Bellwether thanks Ruth Bauer White, Alexandra Bernadotte, Chris Chatmon, Bhavana Chilukuri, Melissa Connelly, Oscar Cruz, Patty Diaz-Andrade, Daren Dickson, Todd Dickson, Kai Drekmeier, David Flink, Janeira Forté, Andrew Frishman, Alejandro Gibes de Gac, AJ Gutierrez, Kim Jackson Nielsen, Emily McCann, Jaclyn Piñero, Craig Robinson, Seneca Rosenberg, Alan Safran, Shruti Sehra, Nadia K. Selby, Bill Tucker, Justin Wells, and Sarah Whitley. Thanks also to our Bellwether colleagues Hailly T.N. Korman for her input on the project, and Lindsay Kim and Amy White for their support on the project. Thank you to Lerner Communications, Alyssa Schwenk, Abby Marco, Zoe Campbell, Julie Nguyen, and Amber Walker for shepherding and disseminating this work, Super Copy Editors, and Five Line Creative for graphic design.

The contributions of these individuals significantly enhanced our work; any errors in fact or analysis are the responsibility of the authors alone. Findings and conclusions expressed here do not necessarily reflect positions or policies of the funders.

About Bellwether Education Partners

Bellwether Education Partners is a national nonprofit focused on dramatically changing education and life outcomes for underserved children. We do this by helping education organizations accelerate their impact and by working to improve policy and practice. Bellwether envisions a world in which race, ethnicity, and income no longer predict opportunities for students, and the American education system affords all individuals the ability to determine their own path and lead a productive and fulfilling life.



About New Profit

New Profit is a venture philanthropy organization that backs social entrepreneurs who are advancing equity and opportunity in America. New Profit exists to build a bridge between these leaders and a community of philanthropists who are committed to catalyzing their impact. New Profit provides unrestricted grants and strategic support to a portfolio of organizations led by visionary social entrepreneurs to increase their impact, scale, and sustainability. It also partners with social entrepreneurs and other cross-sector leaders to shift how government and philanthropy pursue social change to ensure that all people can thrive. Since its founding in 1998, New Profit has invested over \$350 million in 130+ organizations and, through the America Forward Coalition's collective advocacy efforts, has unlocked over \$1.7 billion in government funding for social innovation.



© 2022 Bellwether Education Partners and New Profit



This report carries a Creative Commons license, which permits noncommercial re-use of content when proper attribution is provided. This means you are free to copy, display and distribute this work, or include content from this report in derivative works, under the following conditions:



Attribution. You must clearly attribute the work to Bellwether Education Partners and New Profit, and provide a link back to the publication at <http://bellwethereducation.org/>.



Noncommercial. You may not use this work for commercial purposes without explicit prior permission from Bellwether Education Partners and New Profit.



Share Alike. If you alter, transform, or build upon this work, you may distribute the resulting work only under a license identical to this one.

For the full legal code of this Creative Commons license, please visit www.creativecommons.org. If you have any questions about citing or reusing Bellwether Education Partners or New Profit content, please contact us.