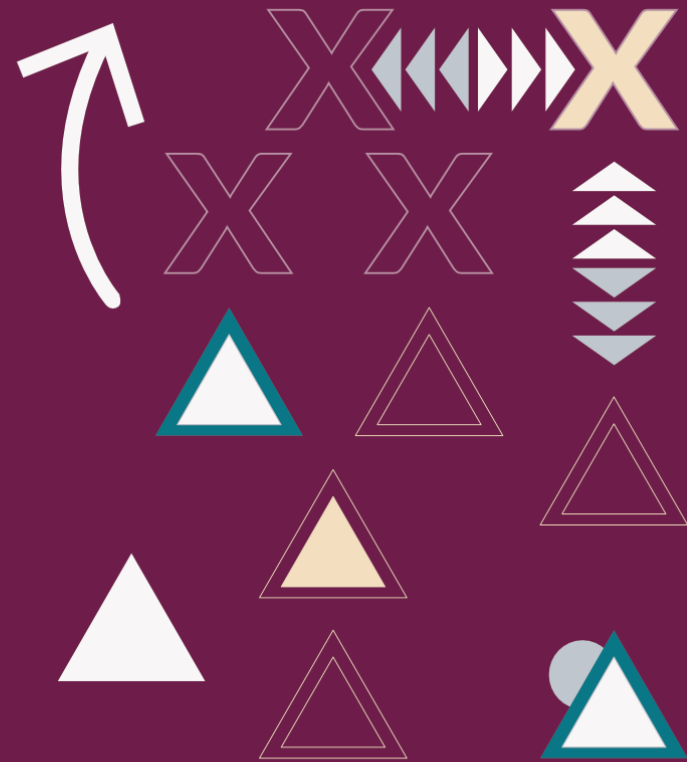


A Pragmatic Playbook for Impact

Direct, Widespread, and Systemic



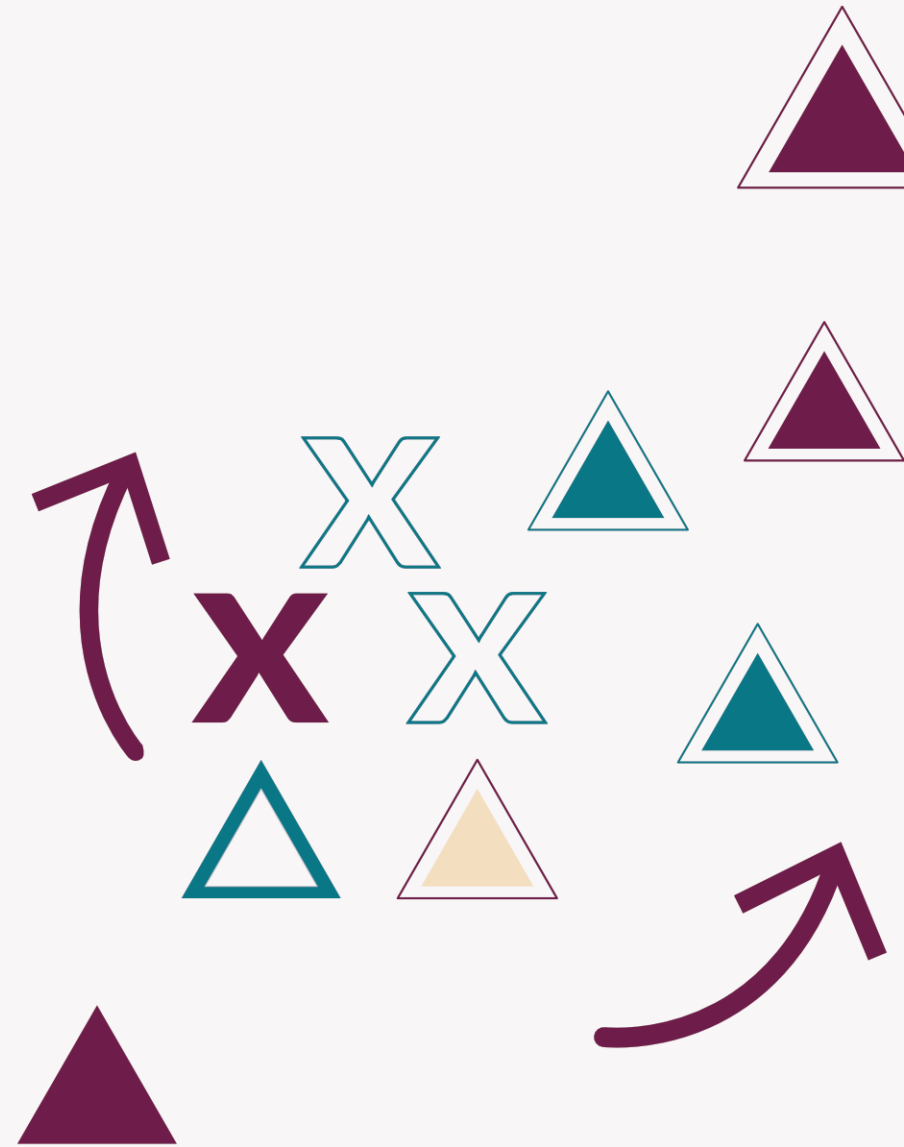
By Alex Cortez and Christine Wade

Revised as of March, 2024



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An introduction



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, COVID-19 has increased both the **urgency and opportunity**:



The **need** has never been greater.



Education systems are under **incredible strain**.



Funding is declining as systems spend down COVID funds and face declining enrollment

Nonprofit organizations can 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.**

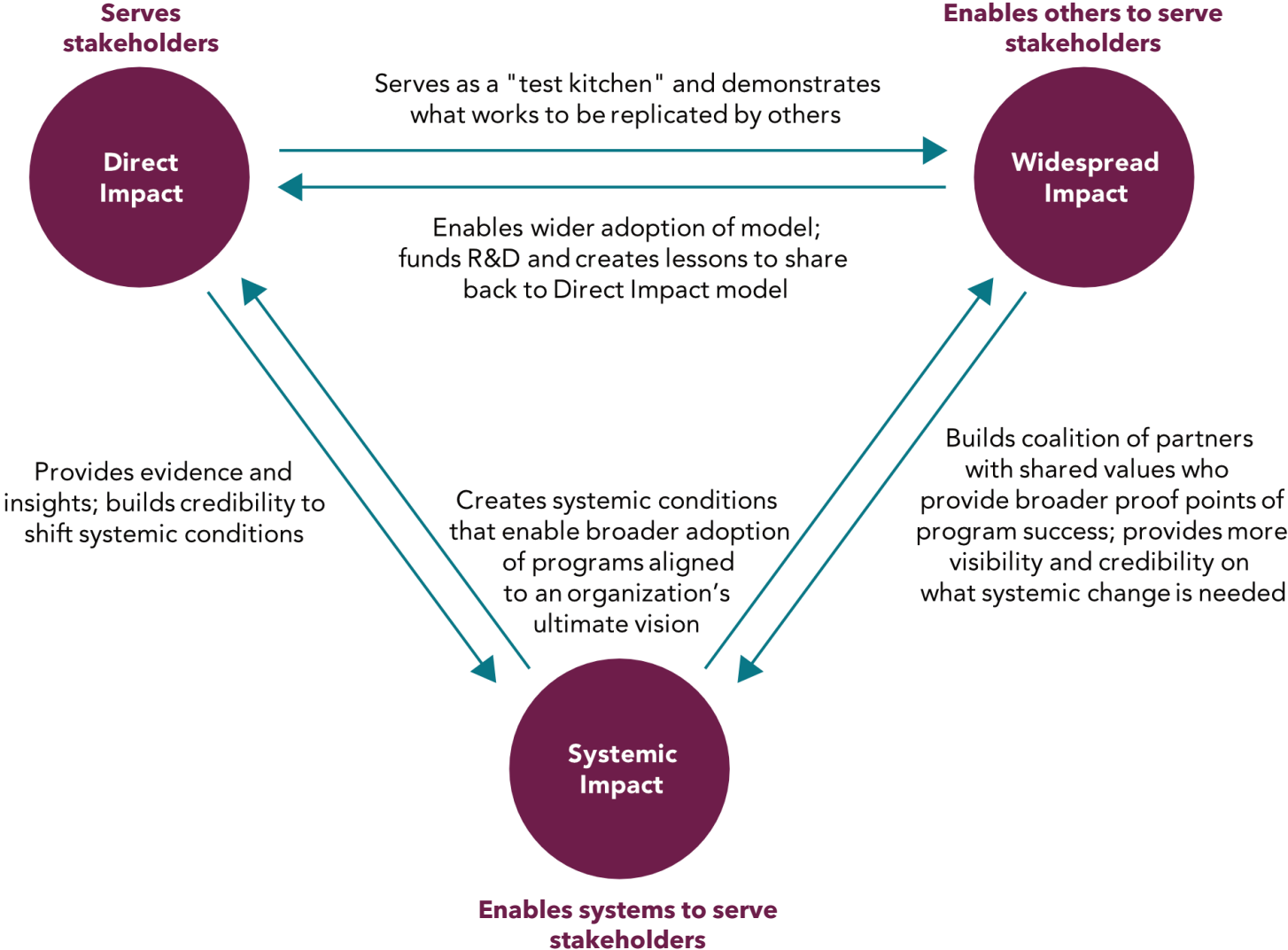
**WIDESPREAD
IMPACT**

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 conditions for systems-level adoption of an organization's program model.

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



Pursuing a mix of these impact strategies can also advance equity for communities and for diverse education leadership.

DIRECT IMPACT

- **Provides supports to a set of 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.

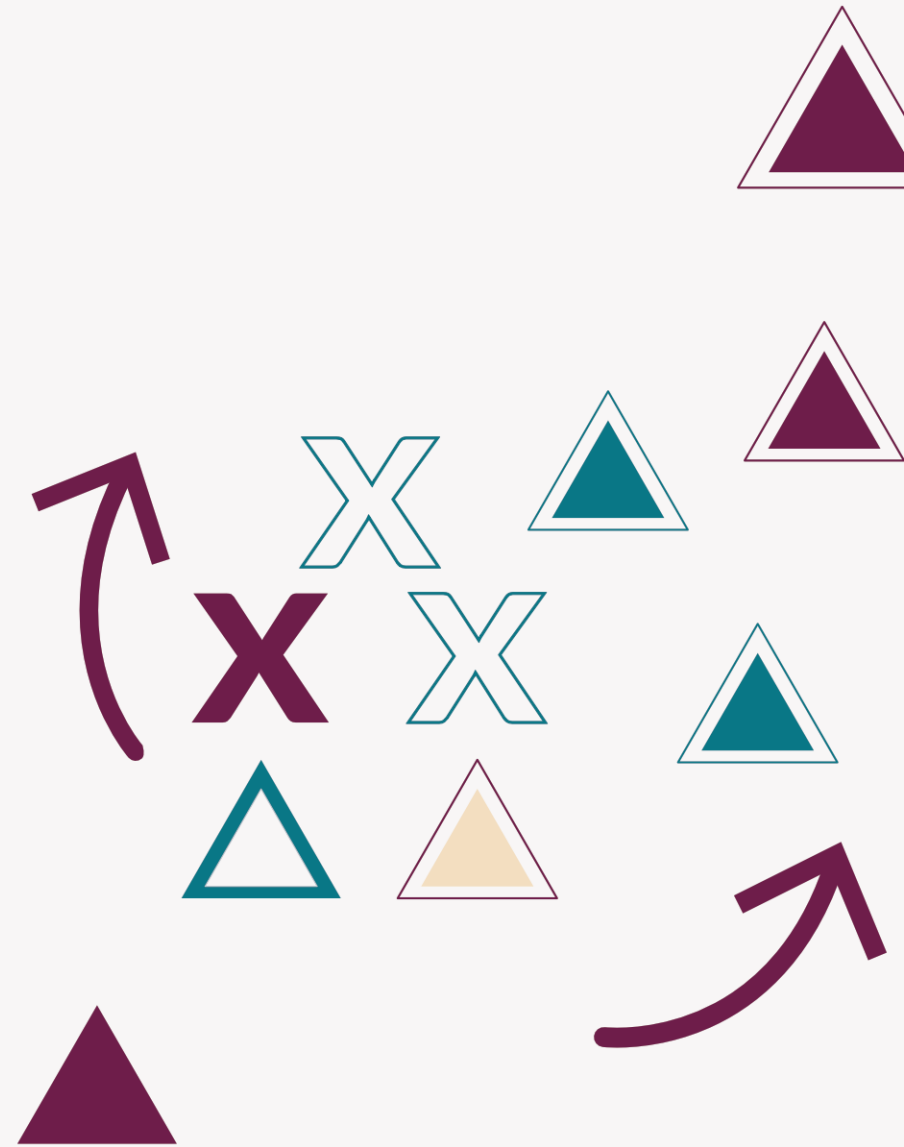
WIDESPREAD IMPACT

- **Radically expands spread of strong practices** to communities who want and need them.
- **Provides evidence-based resources to local organizations** who are often caught in a catch-22 of not receiving sufficient funding because they lack evidence and scale – but lack evidence and scale because they do not receive sufficient funding.
- **Supports local partners to innovate and customize programming to their local context by leveraging the assets of their communities.**
- **Shares local, community-led innovations** so those communities also amplify their impact by sharing with other communities who benefit.

SYSTEMIC IMPACT

- **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 ensures that funding is sufficient and then efficiently, effectively, and equitably distributed.

Direct Impact



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 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 decisions that organizations make in designing their program model.

Design decisions in developing program model		
Dosage of a Program	Duration - for how long is this program deployed - 1 year, 6 months, etc.?	Collectively, what is the expectation of how often beneficiaries engage with an org's programming?
	Frequency - how often are beneficiaries engaged during this duration - once a week, once a month, etc.?	
	Intensity - amount of time per engagement - 10 minutes, 60 minutes, etc.?	
Format of a Program	Where is a program held - at school, work, home, or hybrid?	
	When is a program held - specific time of day or anytime? Live, virtual or hybrid? Real-time, asynchronous, or hybrid?	
	Pace of a program - fixed-pace, self-paced (with guardrails), and/or fully competency/master based?	
	Components of a program - classroom format (live or asynchronous), experiential (project-based or internship/apprenticeship), or hybrid?	
	Ratio of beneficiaries to program session - 1:1, small group, large group?	
	Case Load representing total number of beneficiaries being supported per staff (usually by single staff, but could be a team)?	
	Costs/resources to enable program participation - food, transportation, parking, childcare, translation, tech, stipend, etc.?	
Talent / technology of program delivery	Who are the personnel providing program - what is their background/qualifications?	
	Sourcing/development of talent - how are they hired, trained and managed?	
	Compensation - how much are they paid? What is source of funding and what is its restrictions (such as AmeriCorps)?	
	Role of technology - when is program provided by a person, a platform, or a combination?	
	Systems - what systems are provided to support program execution (and to provide continual data/feedback)?	

Not every program will require these design elements. They are most applicable to programs like tutoring and postsecondary advising... though they can apply to even a whole school model (which is a bundle of programs).

Some programs are explicit about these designs; others are not.

There can also be high variability between program design and execution.

Organizations can also run variations on a program design based on different student profiles, funding, etc.

It is crucial that an organization has a clear articulation of their program design and tracks the actual execution against this design.

Explicitly articulating their program design and then tracking execution enables an organization to:

- **Understand their true resource requirements** - money, talent, time, systems and partnerships.
- **Make trade-offs and decisions on different growth options** over a specific period of time.
- **Right-size fundraising asks and/or contract pricing in the case of earned income** to meet true resource requirements.
- **Track actual execution against program design** to understand what is and is not working and why (be it because of lack of student interest, or the program design, or problems with executing the program as designed).
- **Experiment with program design variations** to understand trade-offs and ROI, and better respond to the needs of different markets in order to grow, including being responsive to the specific needs of different communities and subsegments of beneficiaries.
- **Regarding Widespread Impact or Systemic Impact:**
 - Widespread Impact: Decide what elements of a program model are non-negotiable and articulate those expectations to partners, as well as decide what design elements need to be at the discretion of partners to best meet their local context.
 - Systemic Impact: When thinking about more ambitious adoption by systems, organizations need to understand and be able to articulate what specific program design or designs to advocate for in seeking to change system-level policies, practices, and funding flows.

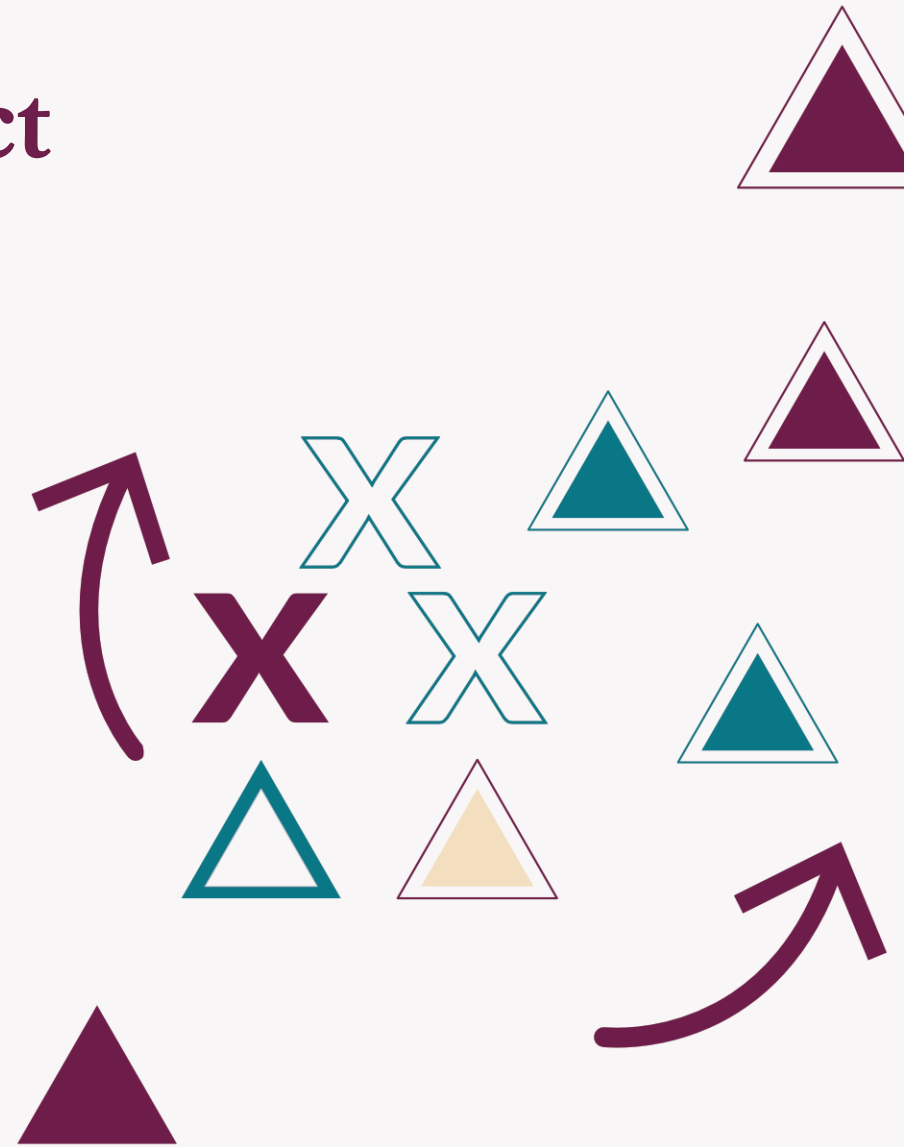
Some organizations experience limits in growing their Direct Impact.

- Some are facing **Direct Impact fatigue**, because growing via Direct Impact is hard in general and was 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."

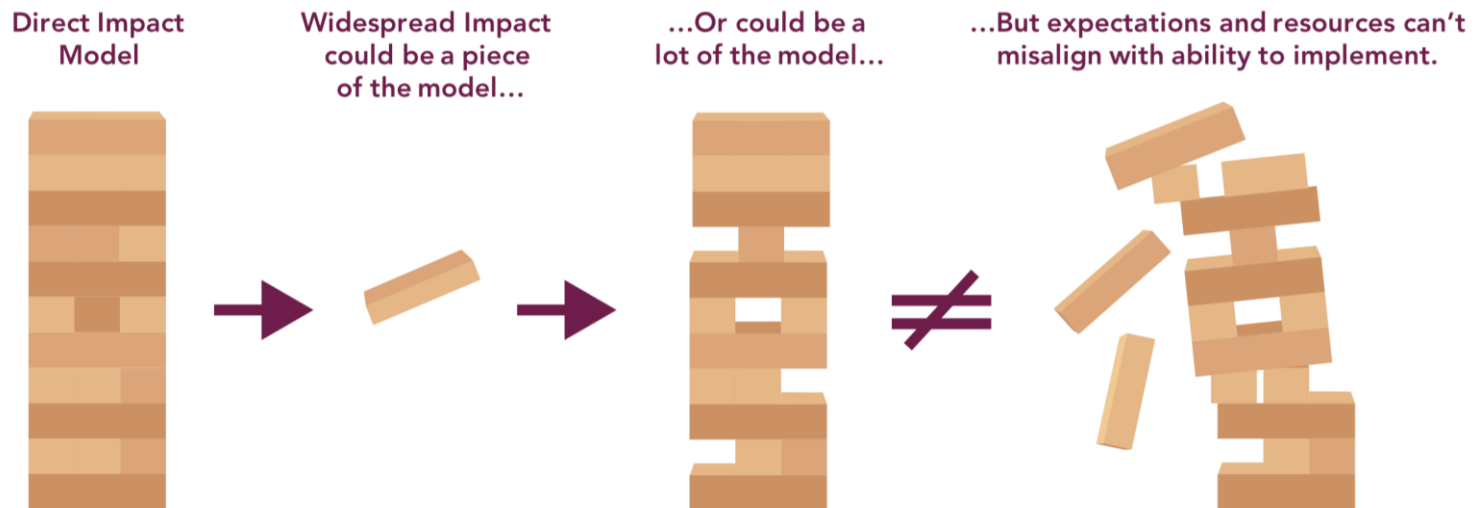
- Alan Safran, Co-Founder and CEO of Saga Education

Widespread Impact

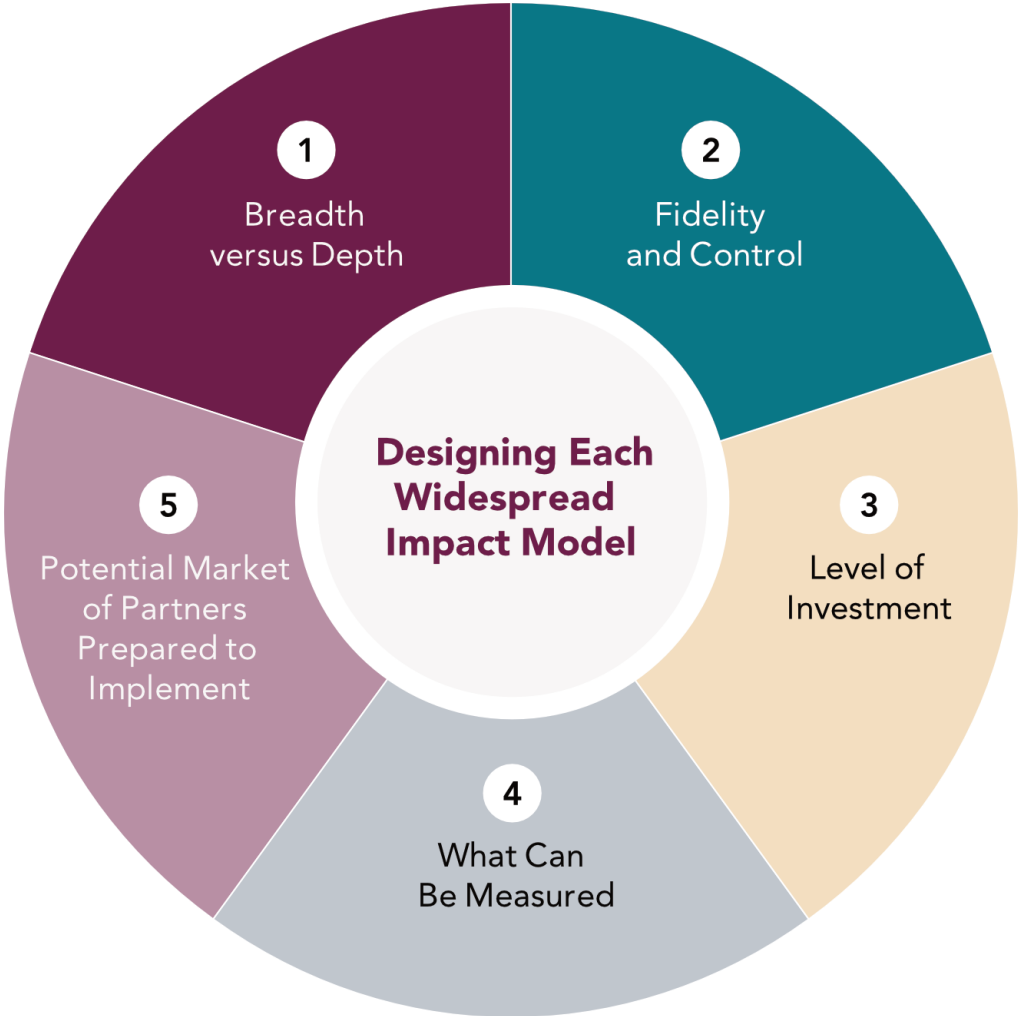


Widespread Impact requires organizations to think about a process of “High-Impact Jenga.®”

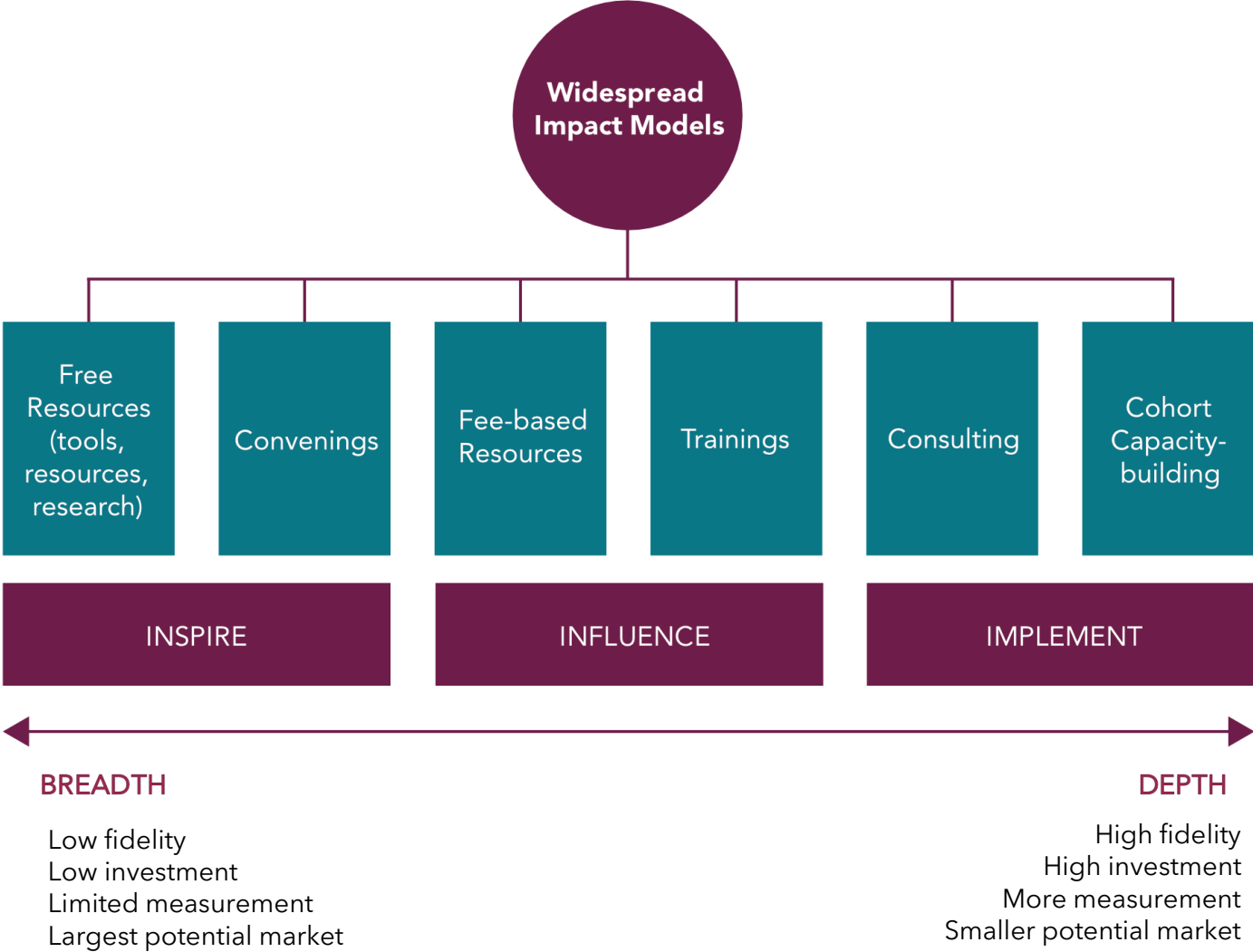
- Widespread Impact is a strategy for how an organization **builds the capacity of partners to implement** elements of its program model.
- This strategy requires organizations to **go through a process of “high-impact Jenga®”** to determine what elements of its Direct Impact model it wants its partners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



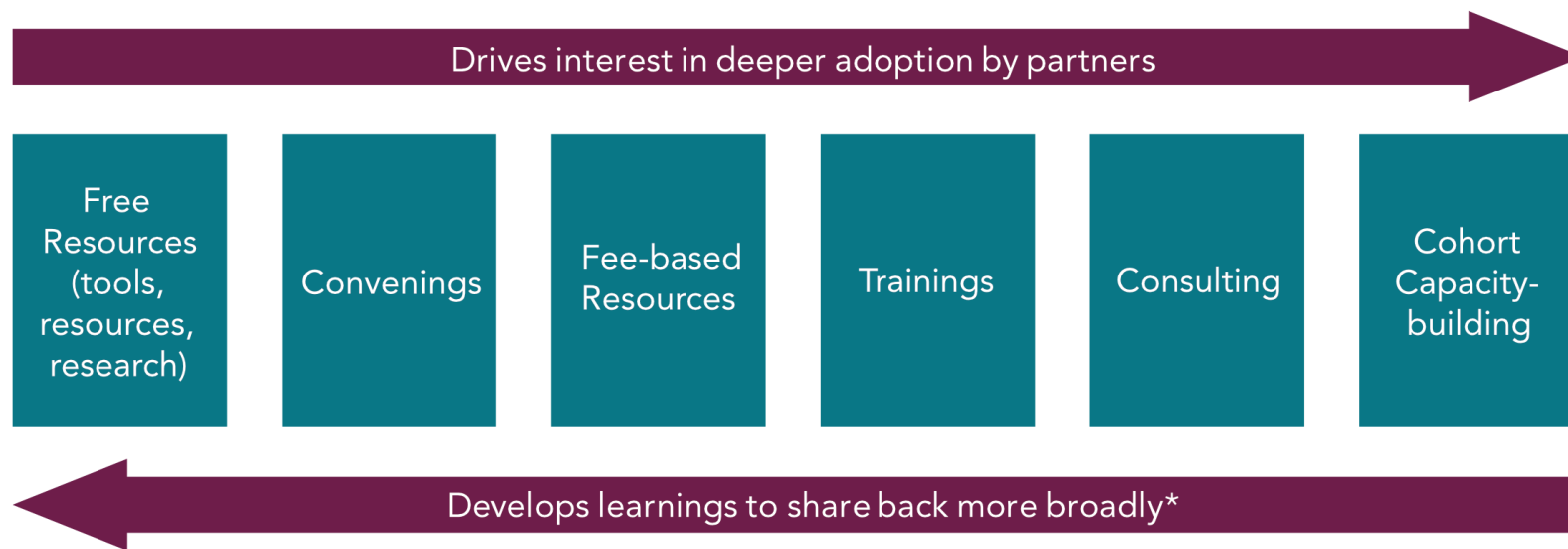
“High-Impact Jenga®” requires organizations to make and align decisions across the following trade-offs.



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 that are focused on deeper implementation.

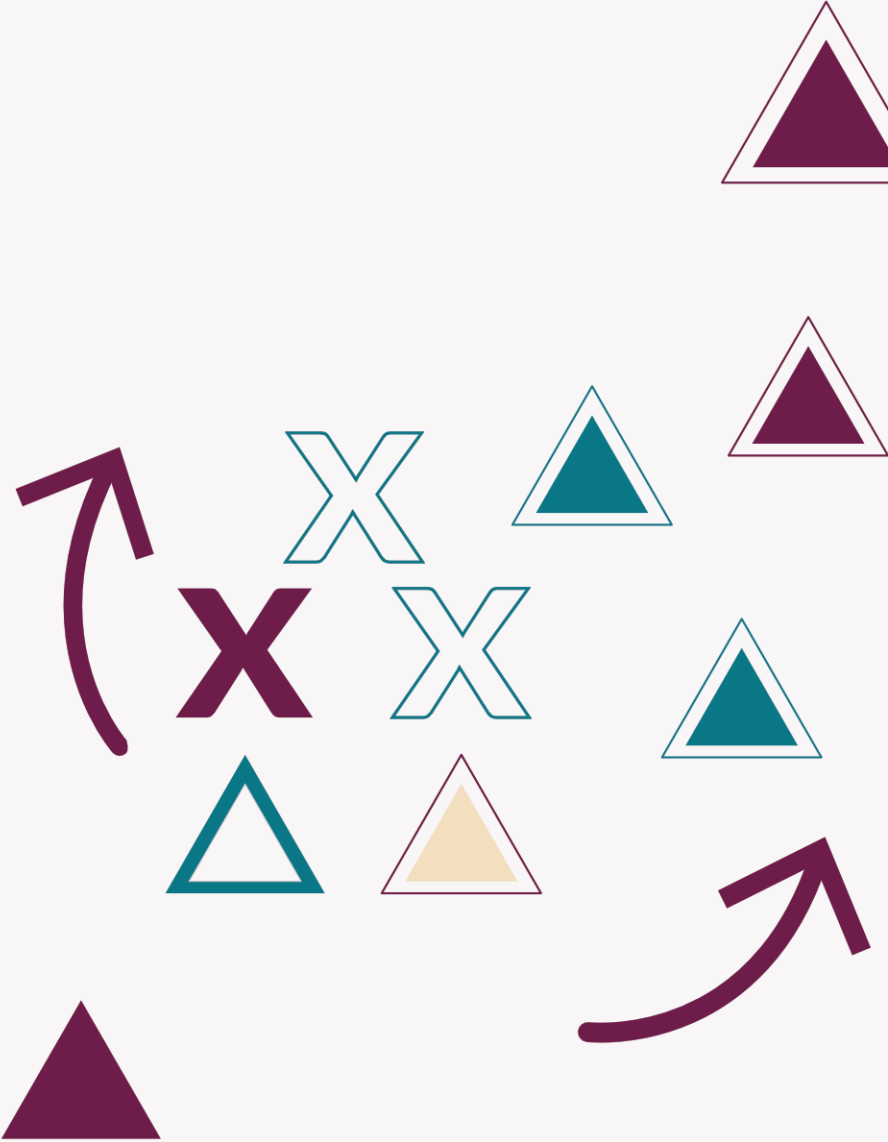
VALUES, RELATIONSHIPS, and CHANGE MANAGEMENT

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



Systemic Impact or Systems Change is... complicated.

Systems change:

- **Is unapologetically about power and who controls the agenda.**
- **Can be murky and mystifying**, and for some it is stigmatizing because it is **explicitly political**.
- **Has a long timeline** - it's not a sprint nor a marathon, but rather a commitment to walk 10,000 steps every day, and frequently around the same track, and sometimes walking backwards.
- **Can focus on partnering, persuasion, pressure... or any combination.**
- **The wheel is always turning.** Those with competing agendas will continue to compete.
- **Is necessary to access the vast majority of funding available** for addressing a social problem that is the responsibility of a social system. *"Systems change is the ultimate in business development."* - unattributed
- **Is not always understood and/or funded by philanthropy** (though this is changing... slowly).

"We are investing something like 98% of our national philanthropy in supply, and at best 2% in demand, and we're not seeing equity-focused systems change happen quickly enough."
- John King, Chancellor of SUNY

Many education efforts have a “Field of Dreams” as their Theory of Change that does not reflect the reality of systems and excludes communities.

Education reform and education philanthropy have often operated under a fundamentally flawed premise. Specifically, **much of education reform/philanthropy pursues a theory of change grounded in a Field of Dreams, paraphrasing the 1989 movie’s iconic line, “if you build it, they will come.”**

This theory presumes that if education reformers and philanthropists are righteous in their intent about addressing inequity and they are getting promising results, then that’s all it takes for others to broadly follow them into the field and transform systems.

Unfortunately, this theory keeps falling short of creating systems-level change because it has two flaws:

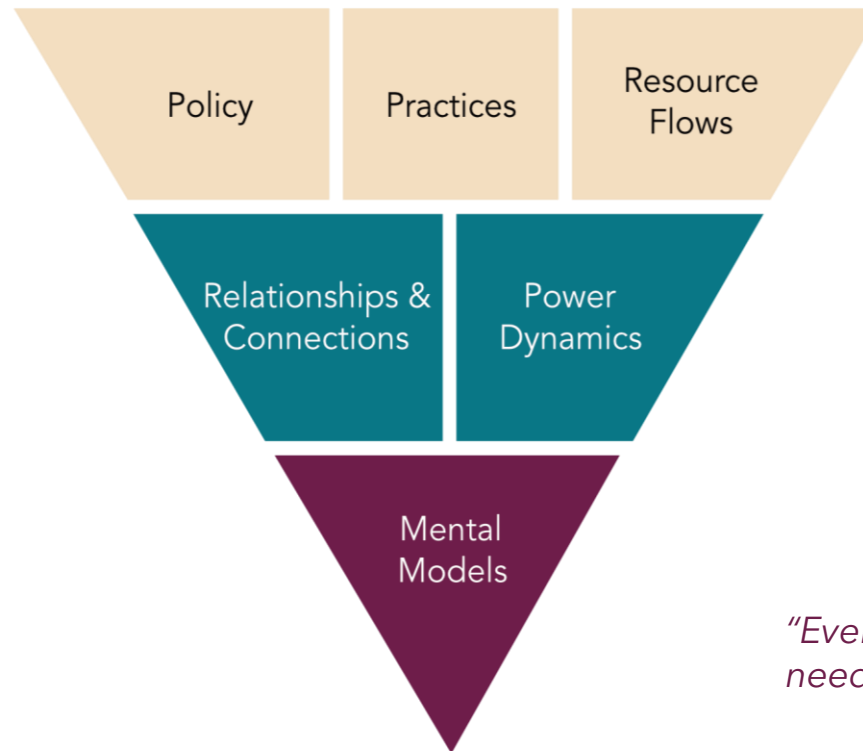
- 1. First, education systems are not rational systems; they are political systems.** Education systems are a complex web of money, power, interests, and values. If an education innovation requires disrupting the status quo of money, power, interests, and values to get to scale, it can expect the system to push back. Systems are very good at organizing to preserve their status quo.
- 2. Second, efforts to change education systems often neglect to be representative of and responsive to the parents and communities they are trying to serve.** The agendas for these efforts are often set by and reflect the value of people with privilege in positions of power. In contrast, these efforts often marginalize and alienate the very communities that these efforts are intended to benefit by imposing an agenda on them, essentially disenfranchising them in the same way that existing underperforming education systems often do.

*“Systems Change is Education Philanthropy’s Only Exit Strategy:
And Community Power is What Will Change Systems”*

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

Approaching Systemic Impact or Systems Change
by leveraging FSG's framework*

Six Conditions of Systems Change



*"Every supply-side organization
needs a demand-side strategy."*

- David Flink, Eye-to-Eye

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

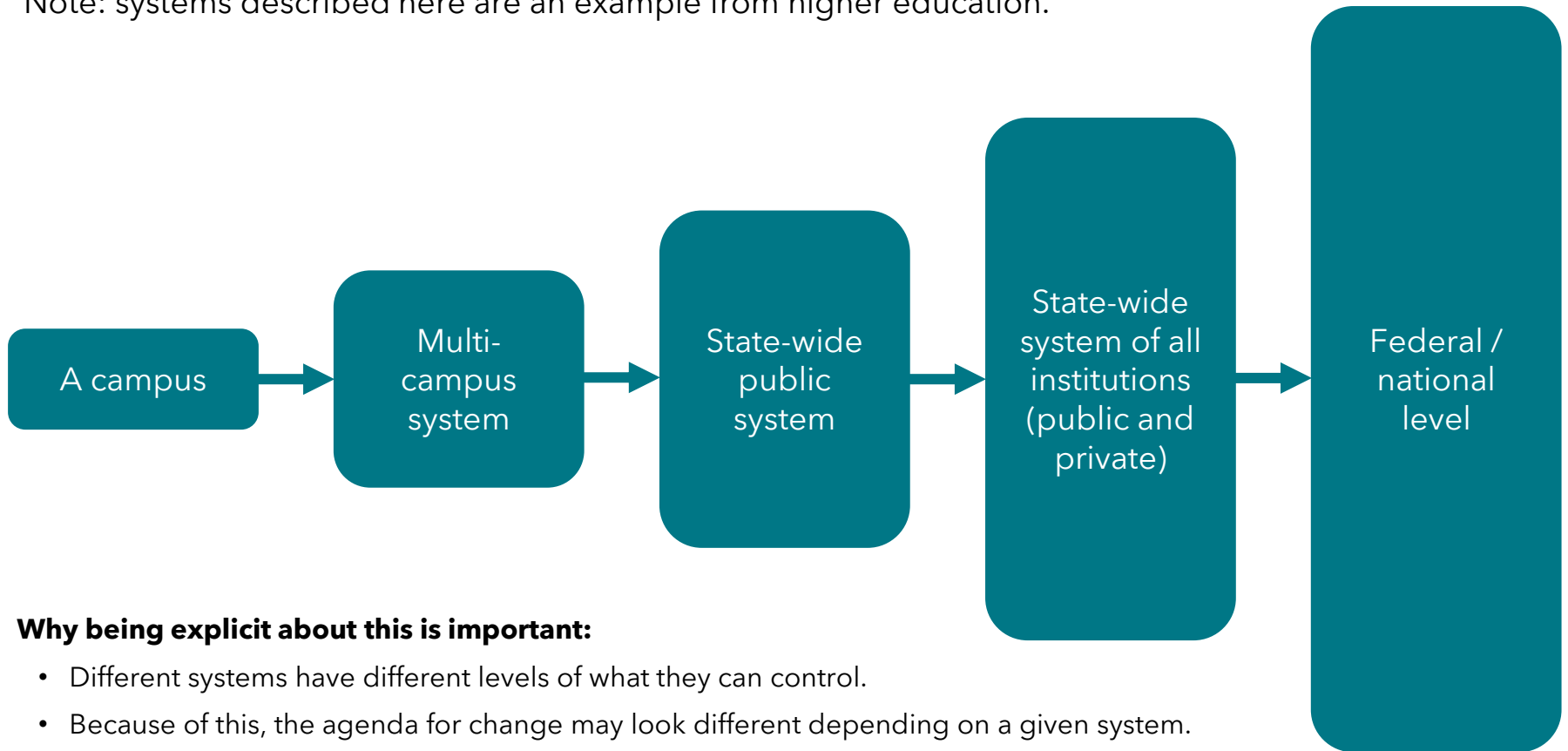
When designing Systemic Impact strategies, organizations should consider the following questions:

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 specific changes** does an organization want to achieve for a given system?
- 3. Who has to be influenced** to make those changes and **how are they influenced** to make those changes?
- 4. Who else needs to be involved and in what role** for changes in a system to be created and sustained?

1. Which system or systems are you trying to change?

Note: systems described here are an example from higher education.



Why being explicit about this is important:

- Different systems have different levels of what they can control.
- Because of this, the agenda for change may look different depending on a given system.
- Who has the authority to make a change can vary by system.
- What levers will influence those with authority can vary by system.
- Who else needs to be involved may look different.

2. What specific changes does an organization want to achieve for a given system?

"Power concedes nothing without a demand."

–Frederick Douglass

Strong campaigns have a clear objective; without that, power and organization tends to dissipate because there is not consensus and a sustaining purpose.

Examples of campaign objectives

Raising a charter school cap or approving a school opening

Changing instructional content / pedagogy

Mandating college advising

Funding college advising

Investing in open education resources

Standardizing financial aid award letters

3. Who has to be influenced to make those changes and how are they influenced to make those changes (1 of 2)?

Power: *“the ability to decide an agenda and make action happen to advance that agenda.”*

Who has the authority to make the change an organization desires?

Who has the power (and underlying relationships) to influence them - be it partnership, persuasion, pressure, or a combination? What are ways to build relationships with those who can exercise that power?

3. Who has to be influenced to make those changes and how are they influenced to make those changes (2 of 2)?

Who has the authority to make the change an organization desires?

Who has the power (and underlying relationships) to influence them – be it partnership, persuasion, pressure, or a combination? What are ways to build relationships with those who can exercise that power?

- **Research and publishing** to raise awareness and shift mindsets (i.e. mental models). This may also leverage resources created as part of some Widespread Impact models.
- **Social media and online communities** to also raise awareness and shift mindsets, and then also to guide individual or collective action by key stakeholders.
- **Active engagement with policymakers**, which can include briefing, testifying, and sharing an organization's experience and expertise in policy formulation. Organizations that have strong evidence from their Direct Impact and/or Widespread Impact models bring credibility to the table for policymakers who value evidence-based practices to shape public policy.
- **Movement-building that supports local parents, students, and/or educators** to organize and build their innate collective power to drive change (and to be the ones defining the agenda for the change being pursued).
- **Lead or participate in a coalition of like-minded organizations** to build an infrastructure of collective power and execute an electoral or issue campaign
- **Build a 501(c)(4) arm** to engage in explicit legislative lobbying and/or electoral activism.

"Grass tops" direct engagement with those in authority and those close to them

"Grass tops" and "Grass roots" strategies are not mutually exclusive

"Grass roots" developing community power to influence those in authority

4. Who else needs to be involved?

"There are no permanent allies and no permanent adversaries, only permanent interests."

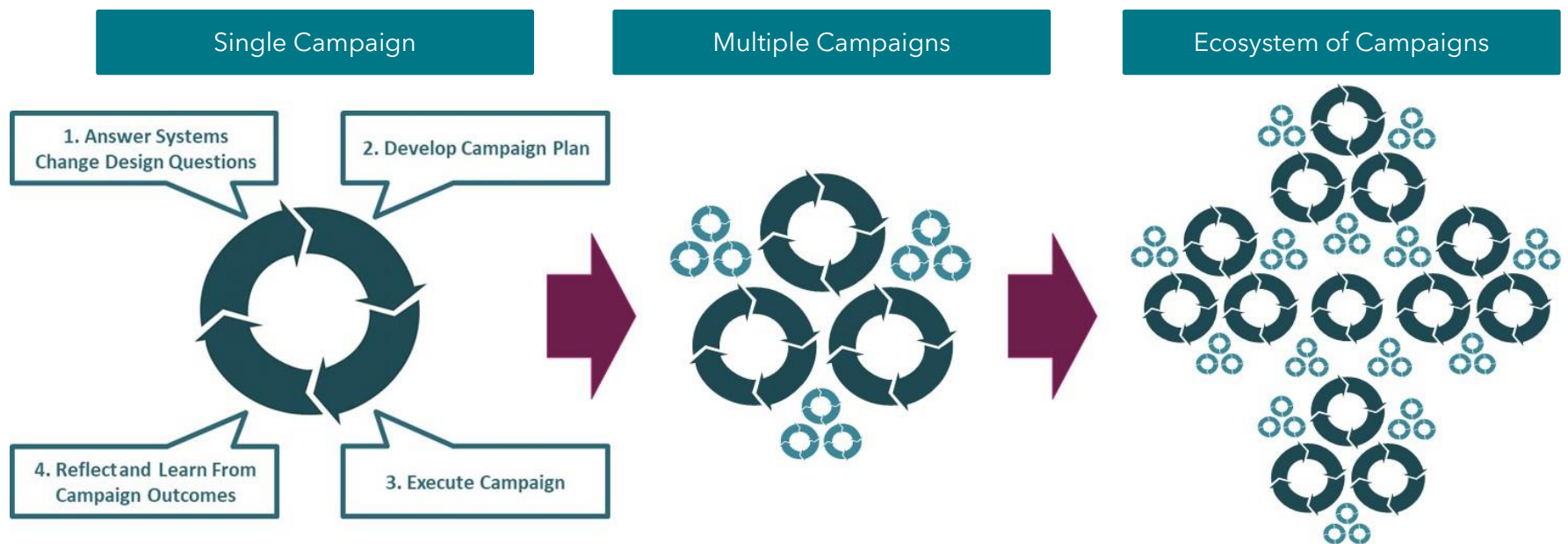
–Open to debate about who said it first



Who has a role in exercising their power to influence those with the authority to make a change? How does an organization or community build relationships with them to influence how they wield that power?

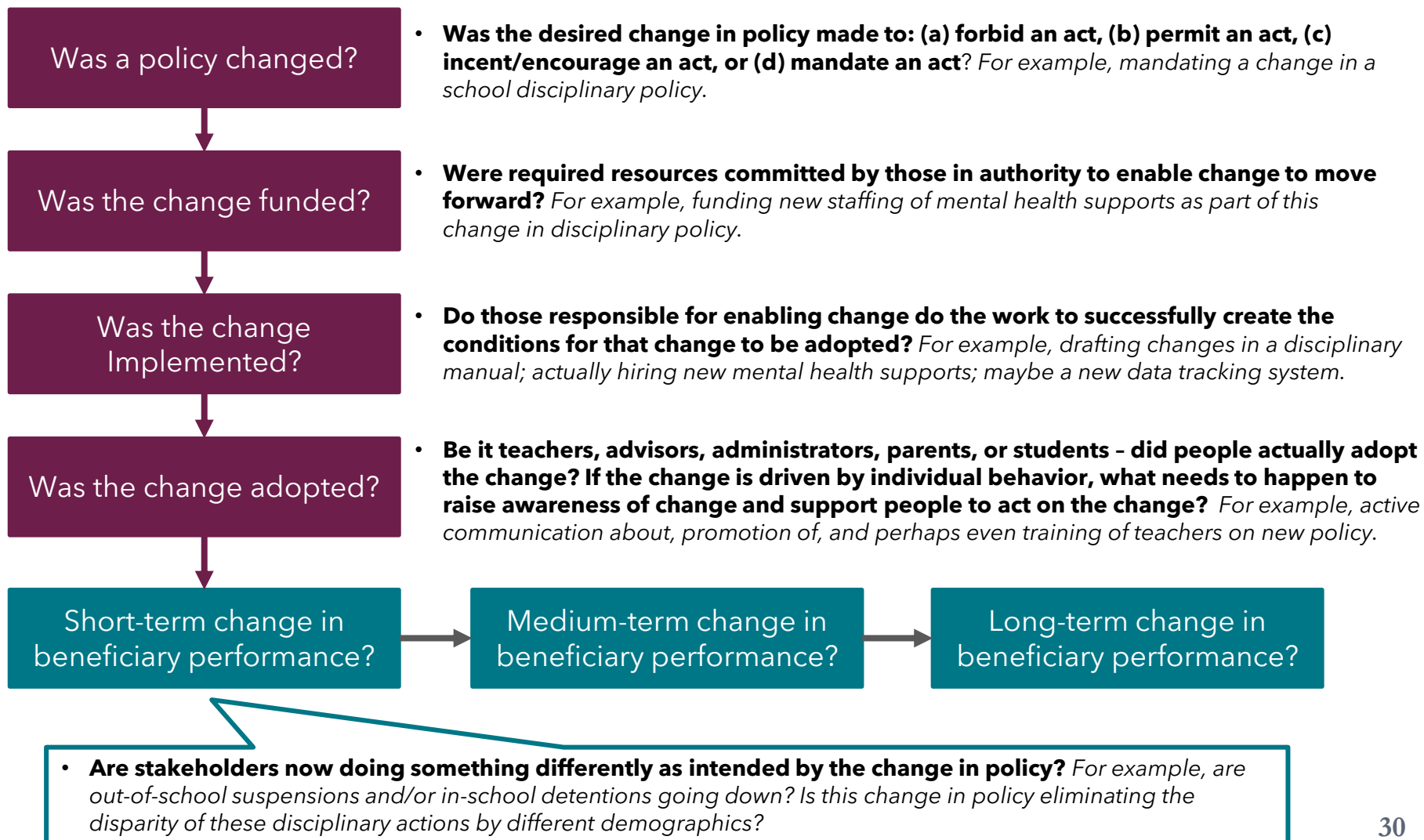
There is seldom one campaign to achieve success. Change – creating it AND sustaining it – often requires an ongoing cycle of campaigns.

- Campaigns **may not initially win and can require multiple campaign 'cycles'** to achieve success.
- Campaigns **may need to win at multiple levels** (local, district, state) to fully realize an impact agenda.
- **Change in conditions** (such as change in leadership or change in financial situation) can require new campaigns to advance new opportunities and/or sustain/protect existing progress.
- **Campaigns by those with a competing agenda** can undo campaign progress you have made - the wheel is always turning.
- **Success in one campaign can reveal the need for another campaign.**



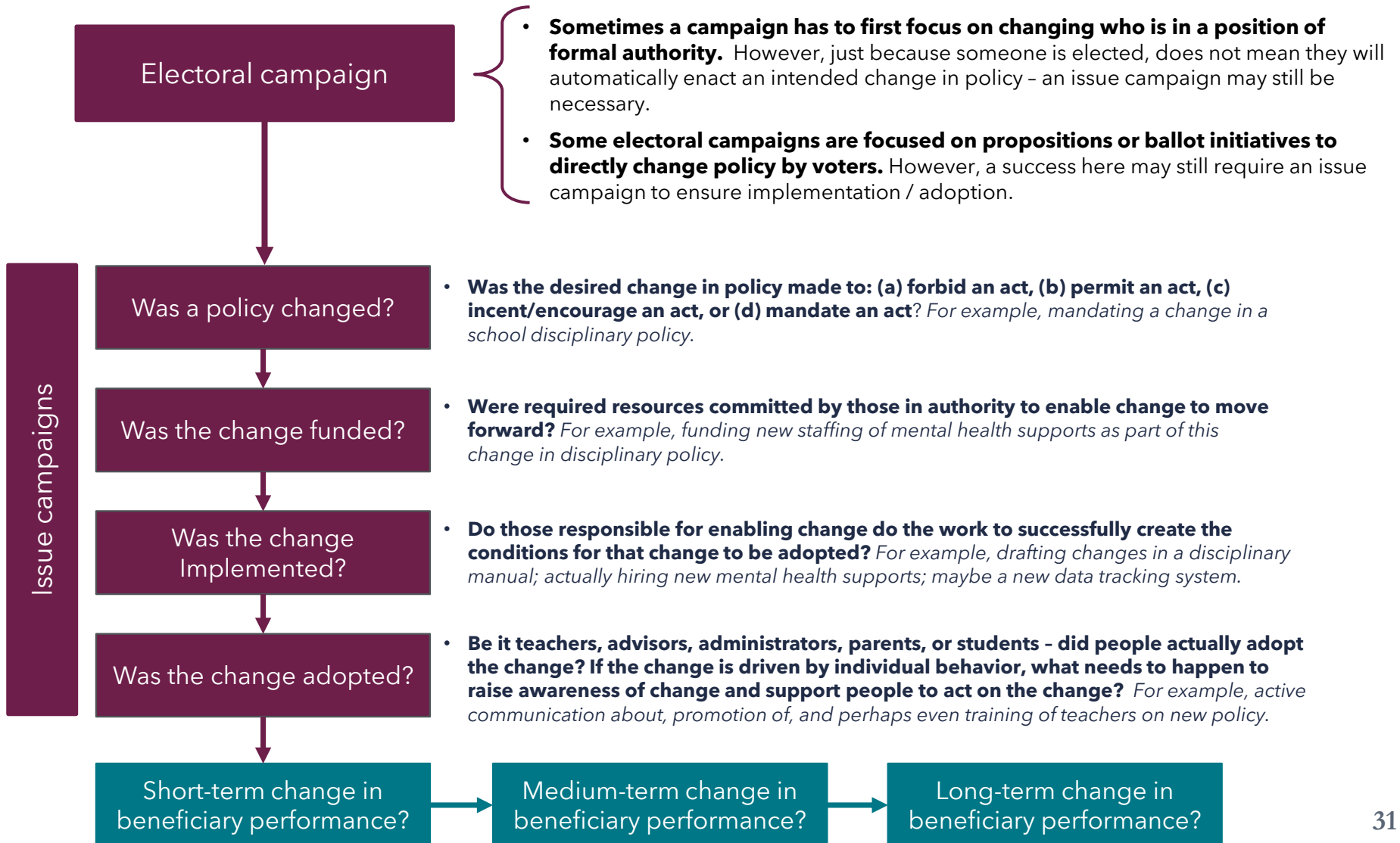
Double-click: Even success in an initial campaign to change policy may require additional campaigns for actual change to happen.

= Potential campaigns

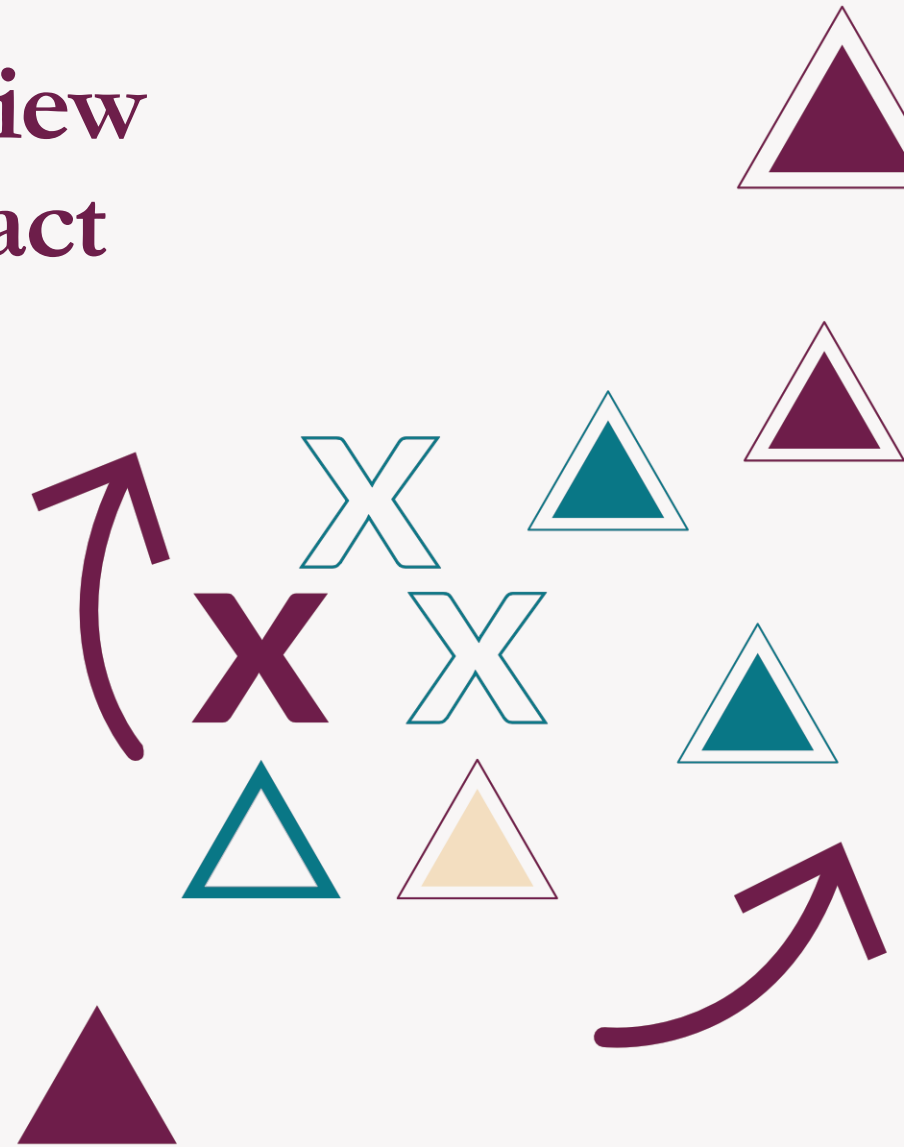


Sometimes an electoral campaign is required before even considering an issue campaign.

= Potential campaigns



Measurement Overview for Widespread Impact



Measuring impact is important to different stakeholders.

Organizations

- Planning, setting priorities, and properly resourcing those priorities - in strategic planning AND on an ongoing basis.
- Managing and maximizing execution.
- Learning.
- Attracting partners, allies, funders.
- Shifting mindsets and ultimately the actions of others.

Partners

- Managing expectations and commitments in the partnership (in both directions).
- Managing and maximizing execution.
- Learning.
- Attracting partners, allies, funders.
- Shifting mindsets and ultimately the actions of others, including within their own organizations or systems.

Funders

- Understanding the impact of their funding.
- Learning alongside grantees.
- Building the case internally to unlock more funding, and to better structure that funding (time-frame, level of restriction).
- Influencing their own long-term strategies.

Policymakers

- Shifting mindsets to understand what is possible.
- Understanding what programs have evidence of impact, for whom, and the conditions required for those programs to succeed (including funding).
- Equipping them with what they need to make the case for changing policies.

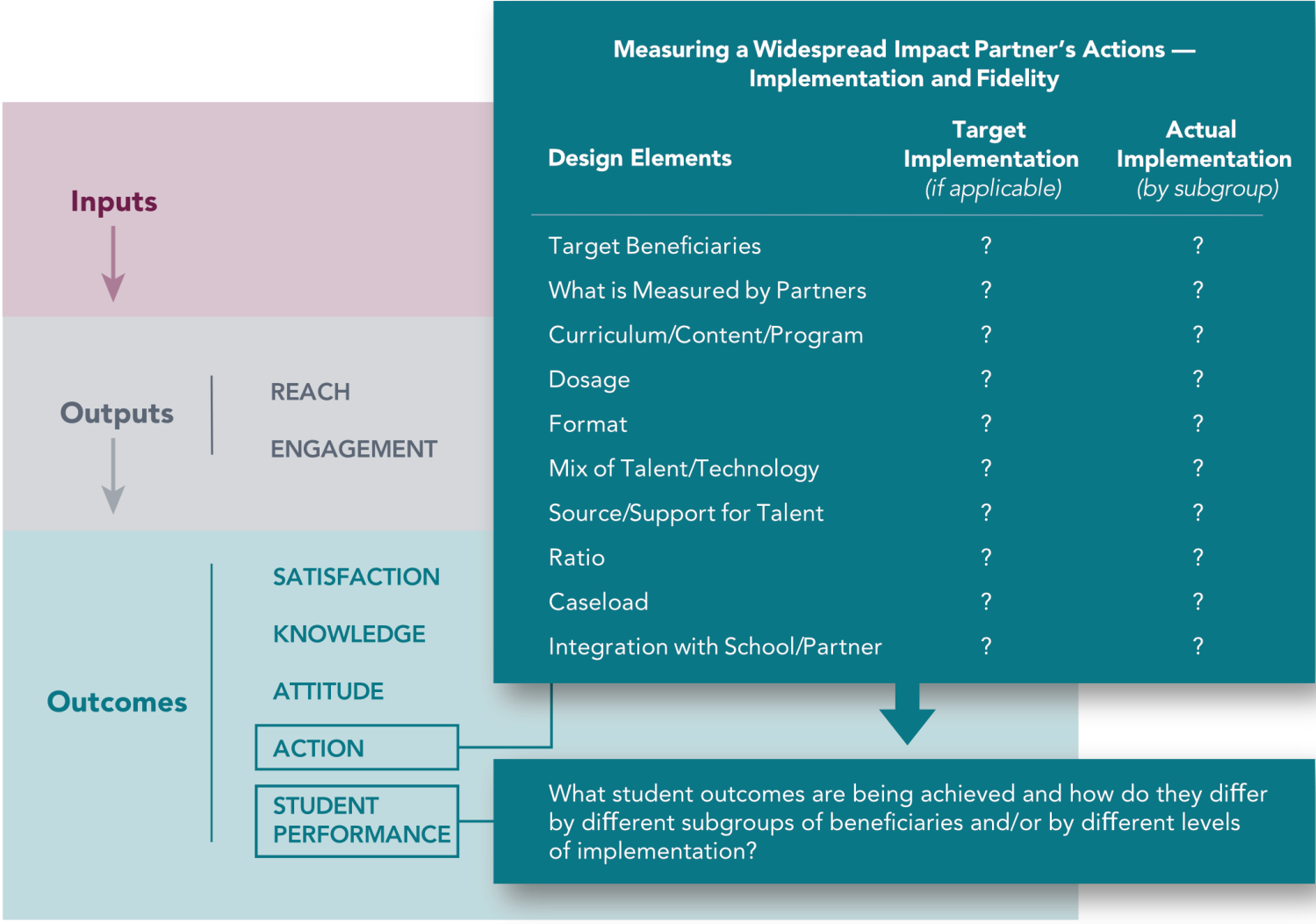
Organizations need to think about measurement at three levels.



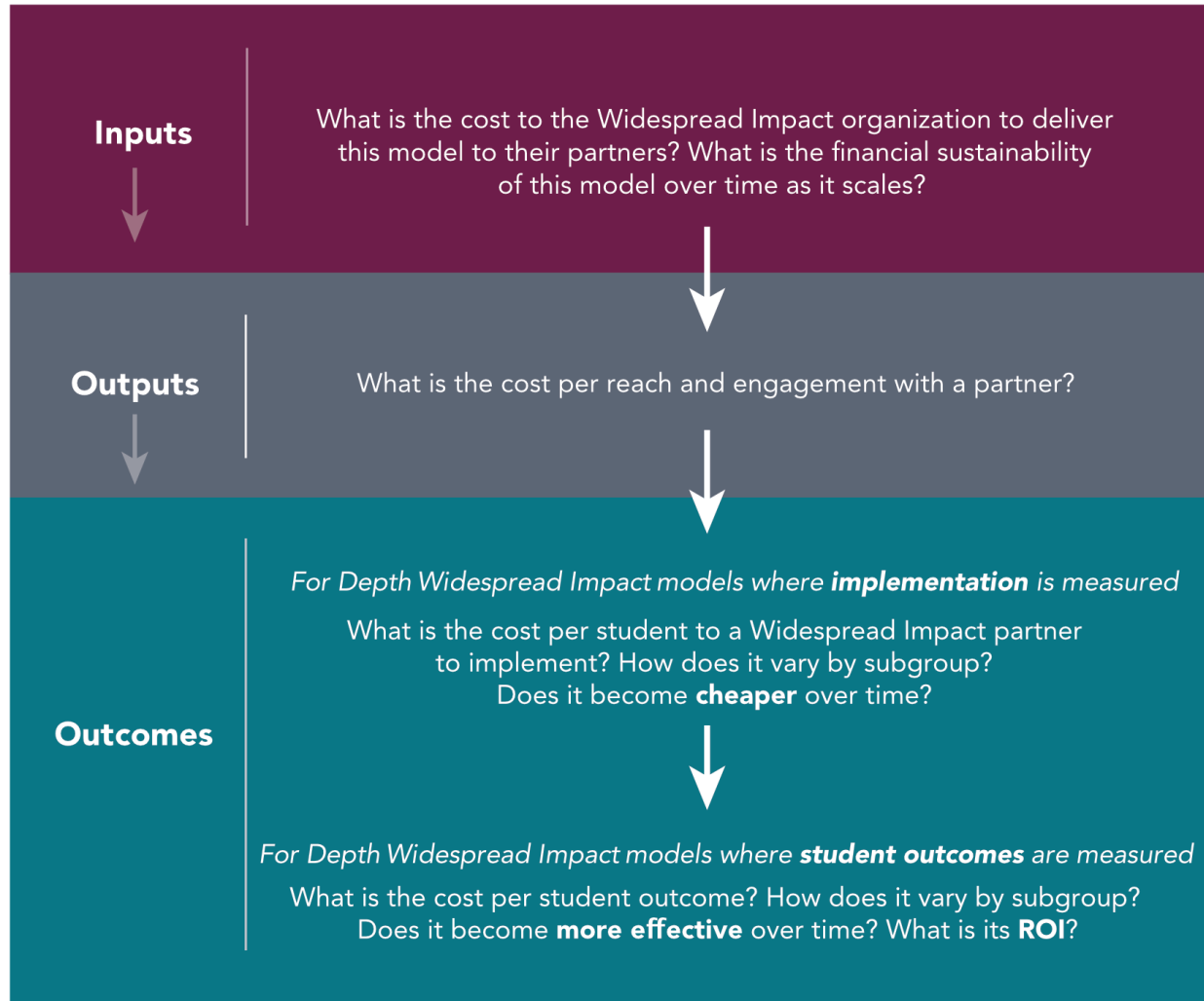
What usually can and cannot be reasonably measured by each Widespread Impact model.

	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 partner implementation of and fidelity to an organization's Widespread Impact program design.



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



Organization Growth and Funding



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.

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.

“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

“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

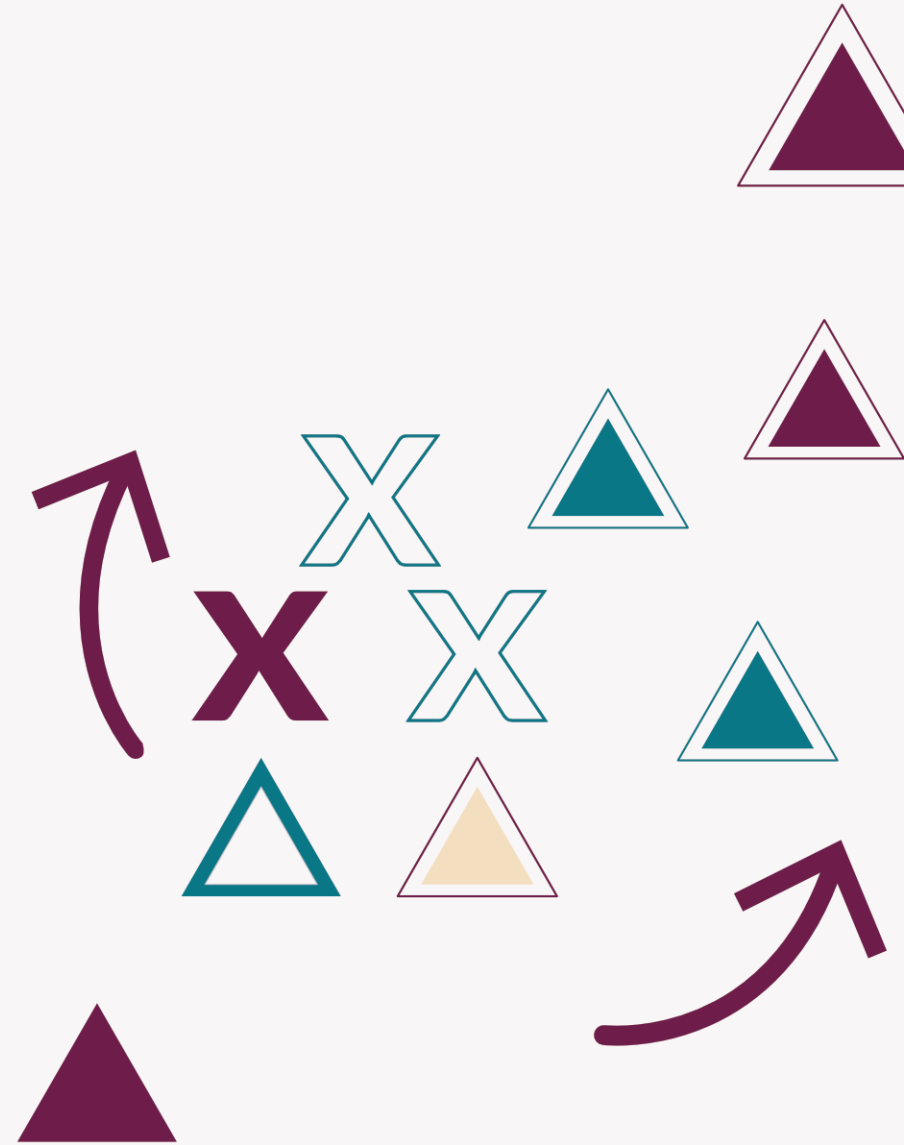
- Necessary to ensure sector-wide **funding is sufficient and then effectively, efficiently, and equitably deployed.**

"Systemic Impact can be the ultimate business development."

–ANONYMOUS CEO

Thank You

For the full essay and set of case studies, please go to:



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Bellwether is a national nonprofit that exists to transform education to ensure systemically marginalized young people achieve outcomes that lead to fulfilling lives and flourishing communities. Founded in 2010, we work hand in hand with education leaders and organizations to accelerate their impact, inform and influence policy and program design, and share what we learn along the way. For more, visit bellwether.org.





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.

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