Building the Capacity to Innovate

A guide for nonprofits

The Bridgespan Group

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Introduction

ABOUT THIS GUIDE

This guide was completed in July 2017 by Laura Lanzerotti, Daniel Pike, and Nidhi Sahni at The Bridgespan Group, with input and guidance from Amira Bliss and her colleagues at The Rockefeller Foundation.

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The ROCKEFELLER FOUNDATION

For more than 100 years, The Rockefeller Foundation's mission has been to promote the well-being of humanity throughout the world. Today, The Rockefeller Foundation pursues this mission through dual goals: advancing inclusive economies that expand opportunities for more broadly shared prosperity, and building resilience by helping people, communities and institutions prepare for, withstand, and emerge stronger from acute shocks and chronic stresses. To achieve these goals, The Rockefeller Foundation works at the intersection of four focus areas—advance health, revalue ecosystems, secure livelihoods, and transform cities—to address the root causes of emerging challenges and create systemic change. Together with partners and grantees, The Rockefeller Foundation strives to catalyze and scale transformative innovations, create unlikely partnerships that span sectors, and take risks others cannot—or will not. To learn more, please visit www.rockefellerfoundation.org.

The Bridgespan Group

The Bridgespan Group is a global nonprofit organization that collaborates with mission-driven leaders, organizations, and philanthropists to break cycles of poverty and dramatically improve the quality of life for those in need.

Our services include consulting to nonprofits and philanthropists, leadership development support, and developing and sharing insights—all with the goal of scaling social impact.

OVERVIEW

Purpose of this guide

In 2017 we surveyed the leaders of 145 nonprofit organizations. Nearly 80 percent reported that their organizations aspire to innovate. And the majority reported that innovation is critical for their organizations, for a variety of reasons. Almost 60 percent need to identify new funding streams. Almost 40 percent need to adapt to changing political or regulatory environments. And more than half believe that without effective innovation, they simply won't be able to achieve the impact they seek.

Unfortunately, only 40 percent of our survey respondents believe that their organizations have met their aspirations for innovation, or that their organizations are set up to innovate successfully.

The purpose of this guide is to help nonprofits close the gap between their aspirations and their current capacity to innovate. It is meant to help nonprofits build the mind-set and the muscles needed to identify breakthrough ideas, opportunities, and ways of working—and put them into practice.

Who should use this guide?

This guide is for anyone who wants to learn more about what it takes to build an innovative organization. It is for restless leaders and staff at all levels of social sector organizations who want to help achieve breakthroughs, and who are frustrated with the lack of new ideas or the inability to move new ideas forward from concept to implementation. It is for those who recognize the value of building an innovative organization and who want to move from aspiration to action.

This guide is also for funders and board members, including those who believe in the power of innovation already and those who might be more skeptical.

Our hope is that this guide makes abstract concepts more concrete and actionable, and that it provides social sector professionals greater clarity about the steps they can take to help build more innovative organizations.

What's in this guide?

In this guide you will find:

				
Definitions	**An overarching framework**	**Learning modules**	**A diagnostic survey**	**Planning exercises and worksheets**
For key terms, like innovation and innovation capacity	Of the key elements of innovation capacity	For building capacity in different areas	For assessing the strengths and development needs of your organization	For setting plans and priorities that fit the needs of your organization

KEY TERMS

What is innovation?

Definitions of innovation—especially in the social sector—vary. We define innovation in the social sector as:

A break from previous practice—either small or large—that has a significant positive impact.

There are many types of innovation, including (but not limited to) innovation in:

- **Offerings:** Developing new products, programs, or services
- **Processes:** Transforming internal work processes, cost structures, production systems, or delivery systems
- **Funding:** Generating revenue in new ways
- **Organization:** Adopting new ways to recruit, develop, manage, or organize people
- **Markets and systems:** Changing the way a field, market, or system operates

How does innovation differ from continuous improvement?

We see innovation as distinct from—and more ambitious and uncertain than—continuous improvement, which involves **learning, adjusting, and making incremental improvements on an ongoing basis.**

Continuous improvement is necessary for innovation, but not always sufficient.

Other key terms

- **Funder:** An individual or organization that funds nonprofits or social enterprises
- **Nonprofit:** Entities that are not funders, have a social mission, and **do not** earn profits for their owners
- **Social enterprise:** Entities that are not funders, have a social mission, and **do** earn profits for their owners
- **Social sector:** The entire ecosystem of funders, nonprofits, social enterprises, and intermediaries, within a region

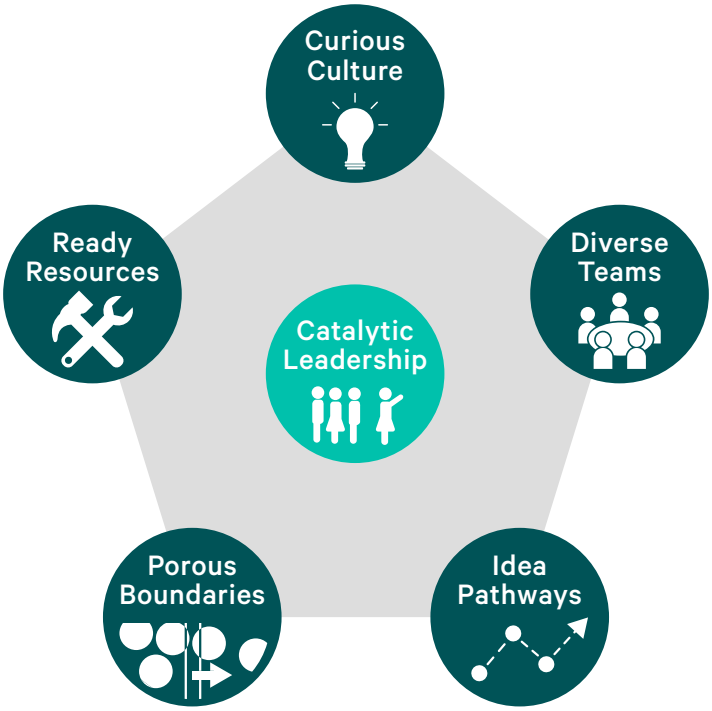
WHAT IS INNOVATION CAPACITY?

How we define innovation capacity

We define innovation capacity as:

An organization's ability to generate innovation (as defined previously) repeatedly, over time.

Our research identified six elements that play an especially important role in building innovation capacity. Consider them useful signposts as you chart your own unique course to building innovation capacity in your organization.



Catalytic Leadership
Leaders throughout the organization demonstrate commitment to innovation, articulate a clear vision and set of priorities for it, and give others the inspiration, freedom, and support they need to innovate.

Diverse Teams
Teams are staffed and supported in ways that harness the power of diverse backgrounds, perspectives, and skills.

Idea Pathways
Criteria, processes, and pathways are in place to generate, prototype, test, develop, and scale new ideas; innovation projects are clear, consistently applied, and effective.

Porous Boundaries
There is a fluid, efficient, and vibrant exchange of ideas and information between the organization and those it serves, between the organization and outside voices, and within the organization itself.

Ready Resources
Staff have access to the resources needed for innovation, including flexible funding, dedicated staff and staff time, and innovation tools and techniques.

Curious Culture
Staff are empowered to act autonomously, and the organization values and supports the questioning of assumptions, experimentation, smart risk-taking, and transparency.

CONTENTS

Learning modules: understanding the elements of innovation capacity

Learning modules contain key concepts, ideas for action, case studies, worksheets, and additional resources.

Appendix

Catalytic Leadership

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Catalytic Leadership

"Let him who would move the world first move himself."
SOCRATES

Innovation requires a certain kind of leadership across all levels of an organization. Specifically, it requires executives, managers, and individual contributors to explore the limits of what might be possible and of what they themselves are capable of to take risks, to tolerate uncertainty, and to learn from both successes and failures.[1]

Without an inspiring vision and steadfast support from leaders who are truly committed, most people will shy away from the challenges that innovation work presents. Yet leaders also need to give others enough freedom, ownership, and space to do the exploration, experimentation, and risk-taking that eventually lead to innovation.

FOR INNOVATION, ORGANIZATIONS REQUIRE CATALYTIC LEADERSHIP AT ALL LEVELS

Eliciting innovation breakthroughs requires leaders at all levels to be **catalytic rather than directive**, and to give those they are leading just the right amount of information and guidance.

Leaders at different levels also have distinct roles to play in supporting innovation, including:

The next few pages provide a set of tools designed to help you and leaders at all levels of your organizations learn, reflect, and improve, so they can better catalyze innovation. The section concludes with a study of catalytic leadership in action at One Acre Fund.

1 Rick Lash, "Best Practices for Leading via Innovation," *Harvard Business Review*, August 6, 2012.

WORKSHEET 1: Innovation visioning tool for executives

Senior leaders who want to support innovation have the unique privilege and responsibility of articulating a compelling vision and set of innovation priorities for the organization to inspire people to solve difficult problems in areas that matter. The questions below provide a blueprint for developing that vision and set of priorities.

Directions: Work through the questions with your executive team or a larger group of colleagues. Ideally, your answers will be informed by many perspectives, have buy-in from key stakeholders, and fit with your organization's wider mission and overall strategy. **Once you've answered these questions, you should have a one-page template of your innovation strategy.**

As an organization, we are committed to achieving the following impact goals in the next five years:

(These might be drawn from your organization's strategic plan, e.g., scaling our reach to serve 10X as many people by 2025.)

1. _____

2. _____

3. _____

We can achieve these objectives by focusing on the following priorities and levers for change:

(These might be drawn from your organization's strategic plan, business plan, theory of change, or logic model, e.g., reducing the cost of serving an additional person by 10% each year for five years.)

1. _____

2. _____

3. _____

To deliver on these priorities, we will need to innovate effectively in the following areas:

(These should reflect your judgment on the kinds of innovation that are needed, given your answers above, e.g., developing new lower-cost program variants, experimenting with technology to improve distribution.)

1. _____

2. _____

3. _____

Next: List three internal or external stakeholders to whom you will communicate the above priorities:

1. _____

2. _____

3. _____

WORKSHEET 2: Self-reflection questions for executives

Directions: Leaders can use these questions once a quarter to reflect on their effectiveness at supporting innovation. Reflect on your own, or with an executive coach, board members, or your senior leadership team. **Once you have reflected, try to identify daily actions you can take to strengthen your leadership in key areas.**

Articulating a vision and strategy for innovation

1. Has our executive team identified and communicated a vision and set of priorities for innovation to the wider organization? Is it time to revise those priorities??

Demonstrating personal commitment and behaviors to emulate

2. Do the individuals accountable for innovation in my organization believe they have the support of the executive team?

3. Am I directly mentoring and supporting high-potential innovation projects in my organization?

4. Am I effectively modeling behaviors conducive to support innovation (e.g., acknowledging failure, fostering collaboration, encouraging constructive debate, taking smart risks)?

5. Do I "get out of the building" to interact and learn from our beneficiaries and others outside our organization? Do my staff?

Investing organizational resources in innovation

6. Are we investing enough in innovation efforts versus business-as-usual and other priorities?

7. Do my employees have the resources—flexible funding, dedicated time, and training—they need to innovate?

Creating structures, systems, and norms that support innovation

8. Can I name the roadblocks to innovation within my organization? What could I do to remove them?

9. Do I "get out of the way" and give people enough autonomy and ownership to find their own solutions to problems?

10. Is our organization getting better at hiring, retaining, and giving voice to staff with diverse skill sets, experiences, and backgrounds?

Next: List three things you will do in the next month to support your organization's innovation efforts:

1. _____

2. _____

3. _____

WORKSHEET 3: Self-reflection questions for others (e.g., for managers and individual contributors across the organization)

Directions: The questions below could be used by anyone in an organization for self-reflection. They could also be used in a group or team setting. **Once you or a larger group have reflected, try to identify actions you will take to advance innovation efforts in your organization.**

Leading projects and setting priorities

1. Do I effectively focus efforts and resources (mine and others) on the ideas that have the most relevance and potential, given our organization's innovation priorities?

2. How could I and my team make more time to think about the future as well as the present?

3. What are the main roadblocks to innovation that I and my team face? How could we remove them?

Coaching, mentoring, and supporting others

4. Do I give and receive effective coaching as it relates to nurturing and advancing promising new ideas?

5. How could I help my team get the resources it needs—funding, people, training, etc.—to pursue promising ideas?

Managing teams to harness diversity and unlock new thinking

6. When appropriate, do I adopt an innovation mind-set instead of a business-as-usual mind-set? (See the next page for an overview of those mind-sets.)

7. What are some assumptions or default ways of working that I or my team should be questioning more actively?

8. How could I triple the number of ideas that I or my team are generating?

Ensuring ongoing learning

9. Are there people outside my team or organization we should spend more time learning from and collaborating with?

10. Do I and my team celebrate and share innovation success stories? Do we acknowledge when things go wrong and learn from that?

Next: List three things you will do in the next month to support your colleagues' innovation efforts:

1. _____

2. _____

3. _____

REFERENCE: The distinction between a business-as-usual mind-set and an innovation mind-set

Directions: Consider each of the two mind-sets below. Each has its merits. There are times when it might be better to adopt a business-as-usual mind-set, and times when it might be better to switch to an innovation mind-set.

For example, you want to use a business-as-usual mind-set for the core program model you are delivering and selectively adopt an innovation mind-set in other contexts when needed. Which of the mind-sets below tends to be your default? Are there specific decision points or situations when you might want to actively switch from one mind-set to the other?

Business-as-usual mind-set	Innovation mind-set
Emphasizes logic	Emphasizes intuition
Asks: "What proof do we have?"	Asks "What if"
Moves quickly to decisions	Considers multiple options and reserves judgment
Asserts "right" or "wrong"	Asserts "there is a better way"
Shies away from ambiguity	Embraces ambiguity
Seeks to clarify the immediate decision-making context	Seeks to understand the full system
Expects linear cause and effect	Anticipates nonlinear interactions and unintended consequences
Set it and forget it	Ongoing, iterative planning
Learn then execute	Continuous learning and refinement of ideas
Seeks standardization and uniform results	Looks for opportunities to experiment and understand variability in outcomes

Source: Adapted from *Improved Innovation Decision Making: An Abridged Toolset and Guide for Decision Makers* (The Global Knowledge Initiative, May 2017). Its table was itself modified from David Magellan Horth and Jonathan Vehar, *Becoming a Leader Who Fosters Innovation* (The Center for Creative Leadership, 2014), as well as *Systems Grantmaking Resource Guide* (Grantmakers for Effective Organizations, February 17, 2016).

CASE STUDY:
Leading innovation with intentionality at One Acre Fund

Founded in 2006, One Acre Fund is a nonprofit that supplies over 500,000 smallholder farmers in Kenya, Malawi, Rwanda, Uganda, Tanzania, and Burundi with services designed to increase their income and reduce hunger and poverty. Its services include financing, distribution of seed and fertilizer, training on agricultural techniques, and market facilitation to maximize profits from harvest sales. One Acre Fund has helped these farmers to increase their income on the products and services that it supports by an average of 55 percent.

When it comes to innovation, the organization demonstrates the importance of having leaders who have a clear vision for innovation, who provide committed and visible support to innovation on an ongoing basis, who set up effective systems to support innovation, and who acknowledge their own failures and learn from them.

From the outset, One Acre Fund's leadership acknowledged that innovation was important for achieving its long-term mission: maximizing income for farmers. As the organization grew, its leaders encouraged staff to search for new products, services, and approaches that could help farmers. Often, these ideas came from farmers themselves; sometimes, they came from partner organizations or research experts. And, even in the early years when resources were especially scarce, its leadership committed resources to assess which innovations to roll out, by predicting the return on investment for farmers and testing new products in a nursery setting.

Over time, its leaders learned some lessons that led them to shift their approach and deepen their investment in innovation. In 2008, the organization introduced a new crop to its network of farmers in Kenya: passion fruit. Based on its own lab results and economic modelling, passion fruit looked set to grow well in Kenyan soil and sell well in the marketplace. However, when One Acre Fund tried to roll out this new crop, it found that farmers were reluctant to adopt it and that it was difficult to get the fruit to local and export markets.

This failure shook the organization. Founder Andrew Youn worried that more mistakes could erode its credibility with its farmers. He decided that "our farmers deserve the same rigor and professionalism in product testing as the customers of Fortune 500 companies." This led Youn and his leadership team to research the practices of such companies and—based on what they learned—introduce a rigorous, multistage process for testing and developing new innovations. Reaffirming their commitment to innovation as a critical part of the organization's mission, they then raised and committed significant funds to support a dedicated innovation team, and put some of their strongest and most respected leaders in charge of it.[2]

Today, One Acre Fund's leaders maintain a strong commitment to innovation. In addition to supporting dedicated teams for product innovation, scale innovation, and radical innovation, the full leadership team dedicates a half day of its twice-yearly meetings to reviewing and planning innovation work. Youn coordinates monthly Town Hall meetings with One Acre Fund's staff, which he uses to reinforce One Acre Fund's culture of experimentation, learning, and "good failure." Youn also takes time to highlight his personal responsibility for any recent failures. Overall, One Acre Fund's senior management devotes about 10 percent of its time to innovation.[3]

As a result of the vision, culture, systems, and resource commitments that its leaders have put in place, One Acre Fund has been able to introduce new products and services that boost farmers' incomes, while increasing the number of farmers the organization serves. Because its innovations are designed to generate returns for farmers, many of the innovations end up paying for themselves. One Acre Fund can then demonstrate impact and sustainability to funders, and ask them to reinvest in new innovations. This virtuous cycle has enabled it to move towards scale and financial sustainability, while retaining many of its early funders and attracting new ones.

2 Jamie Jones and Grace Augustine, "Innovation at One Acre Fund: Seeing the Forest for the Trees" (Kellogg School of Management, 2014).

3 Interview with Matt Forti, Managing Director of One Acre Fund USA.

Diverse Teams

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Diverse Teams

> **"The worst kind of group for an organization that wants to be innovative and creative is one in which everyone is alike."**
>
> **PROF. MARGARET A. NEALE, Stanford Graduate School of Business**

Sameness is the enemy of creativity and innovation. A critical ingredient in innovative organizations is diversity and inclusion, not just in terms of age, gender, ethnicity, or race, but also life and professional experiences, talents, skills, and work styles.

Why are diverse teams more effective at innovation? In addition to bringing more ideas to the table, they suffer less from "group think" and therefore are more likely to challenge the status quo and generate a wider range of new ideas.[4] Different dimensions of diversity contribute to innovation in different ways:

- **Gender, age, and ethnic diversity:** Diversity along these dimensions broadens the range of ideas a group might create. Studies also suggest that when people are in groups with people who look different, they tend to expect that there will be disagreement and different opinions. This encourages people to be more open to new ideas, work harder, and be more creative than they would be otherwise.[5]
- **Representing the people you serve:** Including team members whose experiences reflect those of the population an organization serves can help ensure that products and programs are better designed.[6]
- **Critical and complementary skill sets:** For an innovation to progress from idea to implementation, and eventually achieve impact, teams must include staff who have both "creative" and "commercial" competencies. Bain & Company, a global management consulting firm, refers to this as BothBrain® diversity.[7] In different contexts, having the right mix of other specialist skill sets may also be important.

Hiring a more diverse group of people is necessary but not sufficient for success. Without the active engagement and inclusion of diverse voices, "representative" diversity does not stick. It takes work to design teams and train leaders to help people with different skills and perspectives collaborate productively. But if this is done well, existing research suggests that the results—for creativity, for innovation, and for staff engagement and retention—can be profound.[8]

Organizations that seek to harness the power of diverse teams to support innovation should focus on three main areas:

1. Build a more diverse workforce → **2. Design teams to better harness diversity** → **3. Prepare people to lead and contribute to teams that are diverse and inclusive**

4 Sylvia Ann Hewlett, Melinda Marshall, and Laura Sherbin, "How Diversity Can Drive Innovation," *Harvard Business Review*, December 2013.

5 Katherine W. Phillips, "How Diversity Makes Us Smarter," *Scientific American*, October 1, 2014.

6 *Global Diversity and Inclusion: Fostering Innovation Through a Diverse Workforce*, *Forbes Insights*, July 2011.

7 "BothBrain® Innovation," Bain & Company.

8 Laura Sherbin and Ripa Rashid, "Diversity Doesn't Stick Without Inclusion," *Harvard Business Review*, February 1 2017.

IDEAS FOR ACTION

1A Systematically recruit a diverse workforce

People tend to hire people who look or act like them.[9] Any efforts to diversify hiring or address skills gaps should take into account this natural bias.

Steps you can take

To begin, use the simple table on the right to assess the current mix of skills, backgrounds, experiences, and perspectives within your organization, and consider where you might be underrepresented in areas that are important to your innovation priorities.

Then, adapt your recruiting efforts to fill those gaps.

Recruiting tools you can use include changing the mix of channels you use to attract candidates, restructuring the criteria and process for evaluating candidates, and changing who in the organization should play a role in hiring decisions.

Is your organization diverse and inclusive along relevent dimensions?

Select "yes" or "no" to identify potential gaps

Gender	Yes/No
Age	Yes/No
Ethnicity	Yes/No
Beneficiary perspectives	Yes/No
Technical skills	Yes/No
Creative skills	Yes/No
Other (e.g., issue area, sector)	Yes/No

For example, you might target schools that produce the type of graduates you aim to hire, reduce the role of hiring criteria that can give people latitude to justify hiring people like themselves (such as "cultural fit"), or work to ensure that interviewees are assessed by a more diverse group of interviewers.

You also could consider recruiting people who are part of the population you serve. For example, Prerna Girls School, a nonprofit school for underprivileged girls in India, sees its alumni as a valuable pool from which to recruit. Once the girls graduate and complete higher education, they come back to Prerna in various roles. Their unique perspectives on the program and the girls it serves have allowed the organization to develop new and innovative solutions to various issues, such as restructuring the program to accommodate childcare requirements and the lack of electricity at home. This has resulted in a significant reduction in dropouts. Similarly, the Self Employed Women's Association (SEWA), a trade union of over 1.5 million women workers in India, has dug even deeper to find people. It recruits staff from amongst the large pool of women who are excluded from the formal economy in India, relying on innovative assessments of people's character, values, and potential, in lieu of formal credentials. (See more on SEWA and other Indian nonprofits' innovative hiring approaches in *Stanford Social Innovation Review's* "Why Indian Nonprofits Are Experts at Scaling Up.")

Resources required

9 Lauren A. Rivera, "Hiring as Cultural Matching: The Case of Elite Professional Service Firms," *American Sociological Review* 77 (December 1, 2012): 999-1022.

IDEAS FOR ACTION

1B Create fellowship, internship, and volunteer programs

Fellowships, internships, and volunteer programs can help inject new perspectives into nonprofits. With the right planning and support, these programs can provide meaningful experiences for participants and diversify your organization in ways that boost innovation and creativity. Consider the seniority and backgrounds of the people you want to bring in to your organization, and then consider which of these programs will help you attract people with those profiles.

Steps you can take

Fellowships are especially useful for bringing in expert and senior practitioners, or for attracting people who are considering a switch across industries or professions. Kiva's long-running Fellows program brings people from a wide range of backgrounds, places, and professions in to Kiva. Fellows work in different countries for six months. (See Kiva's website for more on its Fellows program.) Fellows' roles vary but often involve interaction with Kiva's partners and borrowers and responsibility for recruiting new borrowers, partner institutions, and funders. Fellows also are provided with training and professional development support. In addition to supporting Kiva's day-to-day work, Fellows have introduced new ideas that have transformed the organization. For example, Kiva Zip, a major innovation that enables Kiva to channel funds from online lenders directly to individual borrowers through mobile money mechanisms, was developed and is led today by Jonny Price, who originally joined Kiva as a Fellow.

Internships can be a good fit for people who are beginning their careers. Internships can lead to full-time hires and can be designed to achieve diversity objectives, as described in The Muse's "5 Strategies for Creating a More Diverse Internship Program."

Volunteering can suit people with specific expertise who are interested in contributing a few hours a week, rather than building a career in the field. For a technical guide on how to design a volunteer program, see Idealist's Volunteer Resources. For ideas on how to keep volunteers engaged, see the guide Strategic Volunteer Engagement: A Guide for Nonprofit and Public Sector Leaders, published by the RGK Center for Philanthropy and Community Service and the LBJ School of Public Affairs at the University of Texas at Austin.

To be more than a box-checking or resume-building exercise, fellows, interns, and volunteers need to be given meaningful projects, supervision, and support. And staff need to listen closely for valuable new ideas and perspectives that these fellows, interns, and volunteers are bringing into the organization.

Resources required

IDEAS FOR ACTION

2 Design innovation teams to be diverse along key dimensions

In general, if a team or conversation includes more varied perspectives, it is more likely to generate a wide range of ideas and solutions. In innovation work, problems can be complex and solutions may vary widely. As a result, such work often requires assembling different perspectives to solve different problems at different times.

Steps you can take

Focus on ensuring that the teams driving innovation projects are diverse along important dimensions. Consider which perspectives would be most likely to generate the best solutions. As projects progress, the most useful mix of skills and perspectives will likely need to evolve. The experience of the International Rescue Committee (IRC) (see next page) suggests that a wide range of different perspectives can be useful, and they can be most useful at surprising points in the process. For example, IRC built a team that from the outset was comprised of researchers, designers, programmatic experts, and people with business and economic modeling expertise. Having people focused on costs and economics from the outset pushed the designers and researchers to solve for that constraint and generate more low-cost ideas. Similarly, you might experiment with other counterintuitive arrangements, such as integrating people with design thinking expertise into the later stages of a product rollout.

Digital Study Hall (DSH) seeks to improve education for poor children in slum and rural schools in India. It uses hybrid engagement (i.e., a blend of technology, print, and face-to-face mediums) to make high-quality education accessible to students in remote and poor communities. The core team for DSH is comprised of experts in education, gender dynamics, IT, business, and communications. Their diverse perspectives enable DSH to develop novel curriculum and engagement solutions that reach and resonate with its target audience. Educational results in the urban slums it serves have improved three times as a result of DSH's programs.

To ensure teams have a mix of people with different perspectives and work styles, ask prospective members to complete a survey that assesses people's cognitive and psychological styles and tendencies as it relates to work, such as the Myers-Briggs Type Indicator®.

A different way of distinguishing people—right-brain (creative) and left-brain (commercial) thinkers—is especially relevant for innovation. See Bain & Company's "BothBrain® Innovation" portal for an overview and articles explaining the importance of creating teams with left-brain and right-brain thinkers.

Rotational (or "mobility") programs are another potential solution; they identify people with the willingness and ability to learn and work across functional areas, and place them into different teams and roles. Done right, these rotation programs help employees gain new skills and experiences, and develop new relationships, while the teams themselves gain from new energy and perspectives. Academic evidence suggests that rotating people across work groups can facilitate knowledge transfer across organizations[10]—though rotating them too rapidly can make it tough for teams to gel and become truly productive. This transfer of knowledge and diversification of existing teams should, all else equal, create a climate that is more conducive for the emergence and application of new ideas. (See *Harvard Business Review's* "Making Mobility Matter" for suggestions on the kinds of rotational or mobility-based programs that could work for your organization.)

Resources required

10 Hoon-Seok Choi and Leigh L. Thompson, "Membership Change in Groups: Implications for Group Creativity," *Creativity and Innovation in Organizational Teams* (2006): 87-108.

IDEAS FOR ACTION

3 Train and support managers and staff to value diversity and inclusion

Diverse teams and organizations can produce better outcomes, if they are effectively managed and led. But even organizations that hire for diversity tend to onboard for assimilation, rather than inclusion. And differences among people can create tensions—potentially causing people to be cautious about talking openly and slowing down the work of the group. Without inclusion and thoughtful management, diversity doesn't always lead to good outcomes.

The key is to have leaders who are committed to inclusion and managers who understand how diversity affects group dynamics and are able to manage them.[11]

Steps you can take

To help managers and staff improve in this area, consider providing employees with learning materials and training, using approaches similar to those used in CARE.org's gender and diversity training modules.

The Nature Conservancy (TNC) provides similar training on topics like "Engaging Across Difference" and unconscious bias. In the fall of 2015, TNC hired its first chief diversity and inclusion officer, who sits on TNC's executive team. TNC has established resource groups for employees who have a range of different backgrounds and perspectives. It has a Diversity and Inclusion Steering Committee of senior leaders across the organization. They rotate through the committee every two years to ensure TNC's wider leadership team is learning and growing. (See TNC's website for more on its commitment to diversity.)

Digital Study Hall deliberately sought and found a director who is able to effectively engage and manage the organization's diverse team. Dr. Urvashi Sahni, the CEO and founder of the organization, credits the director's effectiveness to the fact that he has grown with the organization and played various roles within it. Additionally, he prioritizes giving team members both freedom and support, dedicating time for the team to socialize and for him getting to know them as individuals.

Resources required

11 Edmund Andrews, "Sangick Jeon: How Do You Manage Diversity?," *Insights by Stanford Graduate School of Business*, June 15, 2015; Vivian Giang, "What It Takes To Manage Diverse Groups," *Fast Company*, October 22, 2014.

CASE STUDY:

Harnessing the power of diversity at Airbel, the International Rescue Committee's R&D Lab

Since the 1930s, the International Rescue Committee (IRC) has been coming up with resourceful ways to respond to the complex humanitarian challenges faced by refugees and displaced peoples. Today, the IRC's 12,000 staff members deliver a broad range of support services across more than 40 countries and in 29 US cities.[12]

Like other humanitarian organizations, however, the IRC has struggled to sustain deeper, more systematic innovation over time. According to Ravi Gurumurthy, chief innovation officer at the IRC, one of the big barriers it faces is that "innovation often requires a diverse mix of skills that can be challenging to fund and organize."[13]

To address this and other challenges, the IRC recently established The Airbel Center, its research and development lab. Airbel brings together IRC's technical and research specialists with people who have expertise in human-centered design, behavioral science, strategic planning, and technology, as well as fundraising and business development. This group is connected to the wider organization but is designed to be semi-autonomous and nimble. Generalist "product managers" orchestrate these diverse teams, managing the skills and tensions that emerge from different perspectives.

Austin Riggs, Airbel's director, described how one such team is working today to design a scalable parenting program for refugees in Syria. Most parenting programs used in the United States and Europe are in-person—like home-visiting models or group-based classes. But such programs would be too expensive to scale in the Syrian context. Airbel's team wanted to think beyond such solutions and identify lower-cost, more scalable alternatives. Riggs, with a strategy background, integrated diverse skill sets into the project. He built a team that included people with expertise in parenting interventions and implementation, but also others who brought perspectives not commonly included in program design discussions at IRC: a human-centered designer, a behavioral scientist, media specialists, and a quantitative analyst proficient in economic and cost modeling.

Having a team comprised of individuals with such different backgrounds and approaches allowed it to engage seriously with very different options—for example, should the team design the best home-visiting model and try to reduce the cost of that somewhat? Or circumvent expensive human capital entirely and invest in lower-cost mobile technology models? Introducing cost as a parameter early in the project was helpful and thought-provoking for the designers and technical experts on the team, and spurred them to imagine new possibilities. By bringing these diverse perspectives together on one team that co-owned the project, Riggs' team has been able to generate many novel and promising ideas it wouldn't have uncovered otherwise.

(Note: At the time of writing, the Airbel project profiled here was still in progress.)

12 "Where we work," IRC.

13 Ravi Gurumurthy, "Innovation at the International Rescue Committee," *Medium*, August 9, 2016.

Additional resources

CARE'S Gender and Diversity Expertise: The Best of the Best

CARE.org (July 17, 2014)

CARE.org provides trainings for its staff in gender equity and diversity that are recognized as an industry standard. Selected modules are available for free on its website.

Diverse Backgrounds and Personalities Can Strengthen Groups

By Marguerite Rigoglioso, Insights by Stanford Business (August 1, 2006)

Summarizes academic evidence around how diversity affects team dynamics.

Diversity Doesn't Stick Without Inclusion

By Laura Sherbin and Ripa Rashid, *Harvard Business Review* (February 1, 2017)

Clarifies the distinction between diversity and inclusion, as well as the key drivers of effective inclusion within organizations.

Global Diversity and Inclusion: Fostering Innovation Through a Diverse Workforce

***Forbes Insights* (July 2011)**

Report shares key findings and insights from a survey and one-on-one interviews with company executives on the need for diversity in innovation. Case studies also included.

Global Talent Innovation: Strategies for Breakthrough Performance

By DeAnne Aguirre, Sylvia Ann Hewlett, and Laird Post, Booz & Company (2009)

Report includes key insights and success stories on how to manage talent in an increasingly globalized world.

Let Your Workers Rebel

By Francesca Gino, *Harvard Business Review* (December 21, 2016)

Article advocates individuality and nonconformity to increase employee engagement; outlines key tactics to highlight employees' strengths.

Human Resources Management for Public and Nonprofit Organizations: A Strategic Approach, 4th Edition

By Joan E. Pynes (Jossey Bass, August 2013)

This 528-page textbook provides a comprehensive survey of current terminology, practices, and issues relevant to human resources professionals, including a chapter on recruiting and managing a diverse workforce.

Idea Pathways

The Bridgespan Group

Supported by
The ROCKEFELLER FOUNDATION

Idea Pathways

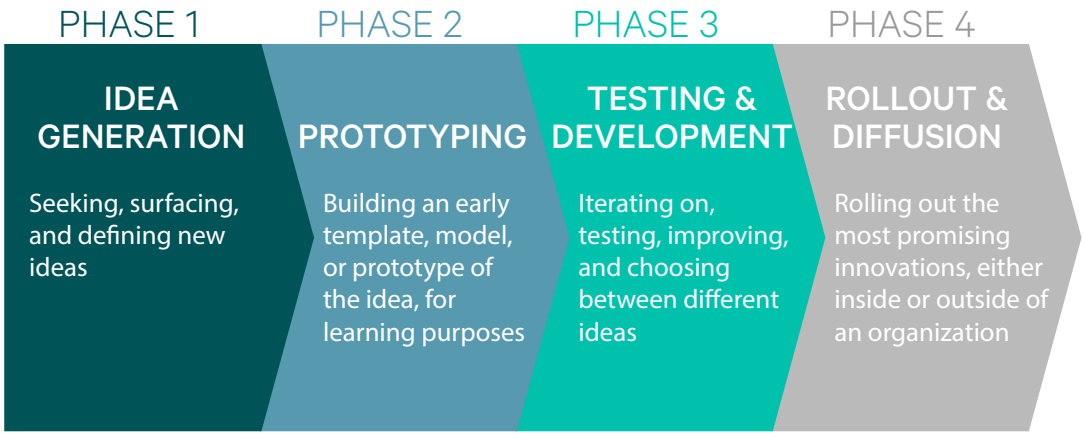
> **"Innovation is a bottoms-up, decentralized, and unpredictable thing. But that doesn't mean it cannot be managed."**
>
> **ERIC RIES, *The Lean Startup***

Bureaucracy and rigidity can stymie creativity and innovation. But our research has found that, to generate impactful innovation over the long run, organizations need to introduce just enough process and structure to provide clear pathways for developing new ideas and ensure that resources are put to the best use.

As Harvard Business School's Professor Linda A. Hill found in her research, "Innovation leaders viewed structure in all its forms as a tool for facilitating the process of collaboration and discovery-driven learning. They used it sparingly. How much did they use? Just enough."[14]

Idea pathways represent the structures, criteria, and processes that organizations agree to use to cultivate, assess, and develop new ideas. If well-designed and carefully managed, the architecture these pathways provide can enhance the quality, relevance, and eventual impact of an organization's innovation efforts.

These pathways are best organized around the phases associated with converting initial ideas into fully-fledged solutions. These phases vary across organizations and contexts,[15] but typically include:



The next few pages provide worksheets for setting up idea pathways that fit your organization's goals and context. They also illustrate how One Acre Fund has successfully used idea pathways to enhance the rigor and impact of its investments in innovation.

14 Linda A. Hill, Greg Brandeau, Emily Truelove, and Kent Lineback, *Collective Genius: The Art and Practice of Leading Innovation*, (Harvard Business Review Press, 2014).

15 Chris Eveleens, "Innovation Management; a literature review of innovation process models and their implications," Research Gate, April 2010.

WORKSHEET 1A: Key questions to consider

Designing idea pathways is an art, not a science. The criteria, processes, and structures you set up are likely to evolve over time. But it's important that your initial plan makes sense to the people who'll be participating in the process.

Directions: Assemble the people who will play a critical role in your idea pathway and work together to develop answers to the questions below. This should give you the key building blocks for your idea pathway.

- **What kinds of innovation are we seeking to generate** (e.g., product, process, funding, etc.)?
- For each of these kinds of innovation, what **approaches and activities might we use** to:
  - Generate new ideas?
  - Test our ideas rapidly?
  - Assemble projects and teams to develop ideas?
  - Roll out our ideas at scale?
- Given the above, **are there distinct phases of development an idea should be taken through**? What are they (e.g., idea generation, prototyping, testing and development, rollout and diffusion)?
- **What will the decision-making process be** for moving ideas from phase to phase?
  - Establishing the right **criteria** is the foundation of a strong overall process.[16] What criteria will we use to identify the highest-potential innovations (e.g., do you need to generate innovations that are affordable? Easily adoptable)?
  - What **indicators** will we use to assess how innovations perform against those criteria?
  - **Who will decide** which ideas progress and which do not? How often? By what mechanisms?
  - How will we **balance speed and rigor**? Under what circumstances would we skip parts of the process?
- What **human and financial resources** will we need to manage and support this process (e.g., who will manage the process overall? Will they have a budget? Do we need to build new expertise)?
- How will we **monitor** how well the process is working overall (e.g., how will we track ROI across the portfolio)?

Useful resources for answering these questions

On measurement and learning:

This FSG blog defines developmental evaluation as a form of measurement and evaluation developed specifically for innovation in a social sector setting.

On generating new ideas:

See Section 3 in Porous Boundaries for guidance on how to hold convenings, bring new voices into your organization, and conduct open calls and competitions for ideas.

On testing and iteration:

Formal or informal methods you should consider using include:

- Lean data
- Lean start-up
- Open testing
- Prototyping techniques
- Value proposition design

On monitoring the process:

See Whirlpool CIO Nancy Tennant's *Harvard Business Review* article on how to monitor and manage an innovation process.

16 Bansi Nagji and Geoff Tuff, "Managing Your Innovation Portfolio," *Harvard Business Review*, May 2012.

Worksheet 1B: Mapping out your idea pathway

Directions: Once you've worked through the questions above, you should be well-positioned to map out the key elements of an idea pathway by filling in the diagram below. (The examples in italics are designed to guide your thoughts on what criteria, method, and resource needs might make sense for you.)

	PHASE 1 IDEA GENERATION	PHASE 2 PROTOTYPING	PHASE 3 TESTING & DEVELOPMENT	PHASE 4 ROLLOUT & DIFFUSION
Goals & learning priorities	• *E.g., surface as many current practices and new ideas as possible*	• *E.g., develop specific concepts to trial*	• *E.g., test relevance and adoptability*	• *E.g., deliver a high-fidelity programs*
Methods to use	• *E.g., benchmarking research; crowdsourcing, competitions, ideation*	• *E.g., visualization, pen and paper mockups, beta websites, and app*	• *E.g., rapid testing with target users*	• *E.g., project and program management tools, e.g., standard operating procedures*
Resource needs	• *E.g., time for research*	• *E.g., design software and other design tools*	• *E.g., research funding, lean start-up expertise*	• *E.g, project management tools and software*

CASE STUDY:

Testing new innovation ideas with rigor at One Acre Fund

"We believe our farmers deserve the same rigor and professionalism in product testing as the customers of Fortune 500 companies." [17]

Andrew Youn, Co-Founder and Executive Director, One Acre Fund

One Acre Fund is a nonprofit, founded in 2006, that supplies over 500,000 smallholder farmers in Kenya, Malawi, Rwanda, Uganda, Tanzania, and Burundi with services designed to increase their income and reduce hunger and poverty. Its services include financing, distribution of seed and fertilizer, training on agricultural techniques, and market facilitation to maximize profits from harvest sales. One Acre Fund has helped the farmers it serves to increase incomes on the products and services that One Acre Fund supports by 55 percent, on average.

The organization's two main innovation goals are: 1) to introduce new products, services, or techniques that increase farmer income (or achieve other impact goals, such as improved soil health and diet diversity), and 2) to introduce program model changes that increase its reach and/or decrease the cost of serving each farmer.

To achieve its first goal, One Acre Fund has set up a dedicated pathway and process around **product innovations**. The pathway is designed to test the criteria laid out in Reference 1A below across five phases, moving from small-scale product testing in its research nursery to market tests with thousands of farmers. (See Reference 1B below for an overview of the process.)

In late 2011 the organization decided to use this product innovation process to evaluate whether to introduce tree species into the bundle of products it offers farmers. One Acre Fund began Phase 1 (idea generation) by surveying its network of farmers and meeting with Kenyan researchers to build a list of species to consider. Then, to begin assessing its first criteria (impact), One Acre Fund modeled the potential economic returns of these different species. Of these, the Grevillea tree seemed most promising. The organization advanced Grevillea into Phase 2 (prototyping), further testing its potential impact via experiments in a nursery setting. At this stage One Acre Fund uncovered technical challenges, such as how best to plant and cultivate the tree in different soils, and commercial challenges, such as finding a reliable, high-quality supplier for the seeds. Only after the organization felt confident it could address these challenges did it advance Grevillea to Phase 3: live testing in farmers' subplots. Grevillea proved valuable for these farmers, and relatively simple for them to implement. Grevillea thus advanced to Phase 4: rigorous trial at scale. At this stage, One Acre Fund confirmed that Grevillea would be widely adopted by farmers, and feasible to distribute and roll out at scale. Having proven its suitability across the four key criteria, Grevillea was then rolled out across the network. Today, it has been adopted by 98 percent of One Acre Fund's farmers in Kenya, generating an average of $13.50 in additional income per year per farmer.[18]

17 Jamie Jones and Grace Augustine, "Innovation at One Acre Fund: Seeing the Forest for the Trees" (Kellogg School of Management, 2014).

18 Ibid; Internal materials; Interview with Matt Forti, Managing Director of One Acre Fund USA, April 2017.

This product innovation process has generated other successful new products. Solar lamps, for example, have also proven widely popular and valuable. In 2016, One Acre Fund distributed 170,000 lamps to its network, at an adoption rate of ~38 percent and an average annual impact of $18 per adopter. Noted Matt Forti, managing director of One Acre Fund USA: "I would say this has been our most successful rollout, along with trees. It involved several seasons of trialing multiple brands, carefully tracking costs displaced through daily logs kept by randomly assigned intervention and control farmers, tracking product durability and determining which provider could provide adequate supply with good warranty policy, etc., before landing on the optimal product line for our clients."[19]

As a result of these innovation efforts, in 2016 One Acre Fund's innovation over the prior two years generated an incremental $10 in income per farmer, per year and increased its key efficiency ratio (farmers served by each field officer) by well over 50 percent between 2014 and 2016.[20]

REFERENCE 1A: One Acre Fund's product innovation process

	PHASE 1 IDEA GENERATION	PHASE 2 PROTOTYPING	PHASE 3 TEST	PHASE 4 RIGOROUS TRIAL	PHASE 5 ROLLOUT
Learning priorities	• Develop trial concepts	• Initial impact and simplicity estimates	• Confirm impact and simplicity under farmer conditions • Initial adoptability and operability estimates	• Confirm adoptability and operability at scale	• N/A
Methods	• Basic research on best practices and potential concepts	• Small pilot: – In a nursery or research station	• Intermediate pilot: – Randomized, side-by-side testing in farmers' subplots	• Advanced pilot: – 10,000+ farmers in a full/live district of operation	• Full-country rollout

Source: Jamie Jones and Grace Augustine, "Innovation at Once Acre Fund: Seeing the Forest for the Trees" (Kellogg School of Management, 2014); "One Acre Fund Innovations Update," (One Acre Fund internal document), July 2016.

19 Interview with Matt Forti, Managing Director of One Acre Fund USA, April 2017.

20 "One Acre Fund Innovations Update," (One Acre Fund internal document), July 2016; Interview with Matt Forti, Managing Director of One Acre Fund USA, March 2017.

REFERENCE 1B: One Acre Fund's evaluation criteria for product innovation

Criteria	Description	Indicator
Impact	The single most important component of the selection criteria is impact: Could this technology enable smallholder farmers to earn incremental income? All trials will include observing and recording incremental income generated, under multiple configurations. The aim is for an annual increase of $10 of incremental impact per adopter.	$ of incremental income (after repaying One Acre Fund) per farm family
Adoptability	Second, seek technology configurations that have the potential to be scaled across at least 30% of the farmer network and replicated on a global level. There must be evidence that the technologies would be adoptable by farmers across a myriad of environmental, social, and cultural contexts.	% of network that is realistically expected to adopt this technology
Simplicity	Third, pursue **simple** technologies, seeking to identify opportunities for small changes to existing farmer practices. A successful innovation is not labor-intensive and does not require a rigorous level of skill straining. Rather it is something that nearly any hard-working farmer could implement successfully.	Level of skill and behavior change required to adopt the technology successfully
Operability	Last, seek technologies that can be distributed successfully at scale. One Acre Fund wants to increase adoption on a global level, which requires innovations that can be easily operationalized, systematized, and standardized to enable mass dissemination.	Level of delivery complexity at scale

Source: Jamie Jones and Grace Augustine, "Innovation at One Acre Fund: Seeing the Forest for the Trees," (Kellogg School of Management, 2014); Some numerical targets and thresholds have been updated and revised to reflect more current targets as of April 2017.

Additional Resources

Lessons for Nonprofits Seeking to Grow a Promising Program: Case study of the Bridge to Resilient Youth in Transition program

By Taz Hussein, Sridhar Prasad, and Bradley Seeman, Bridgespan.org (November 10, 2014)
Shares lessons for nonprofits seeking to scale programs, based on a case study of the Bridge to Resilient Youth in Transition program.

Managing Your Innovation Portfolio

By Bansi Nagji and Geoff Tuff, *Harvard Business Review* (May 2012)
Applies a disciplined and deliberate portfolio approach to generating innovations consistently over time in private firms.

Scale Innovations: Farmers First

One Acre Fund (December 2014)
Details how to measure an organization's social impact in a way that helps to maximize that impact, using Once Acre Fund's own experience as an example.

Six Steps to Successfully Scale Impact in the Nonprofit Sector

By Erin Harris, *The Evaluation Exchange* (Spring 2010)
Highlights a framework for scaling up a social intervention.

Social Good = Scale x Impact (Who Knew?)

By Matthew Forti and Andrew Youn, *Stanford Social Innovation Review* (July 28, 2014)
Describes a simple formula to calculate the potential social impact of a new intervention; can be used to prioritize between potential innovations.

The Five Requirements of a Truly Innovative Company

By Gary Hamel and Nancy Tennant, *Harvard Business Review* (April 27, 2015)
Explores five elements of innovative organizations that are often missing from other organizations.

The Process of Social Innovation

By Geoff Mulgan, *Innovations* (Spring 2006)
Provides an overview of social innovation: what it is, who does it, and the process by which it happens.

The process of social innovation

The Young Foundation, Nesta, and the Social Innovation eXchange, SocialInnovator.info
Includes an alternative framework for the stages of social innovation as well as case studies and more detailed practical tools.

Transformative Scale: The Future of Growing What Works

By Jeffrey Bradach and Abe Grindle, *Stanford Social Innovation Review* (February 2014)
Shares nine strategies for nonprofits to deliver impact at a scale that truly meets needs.

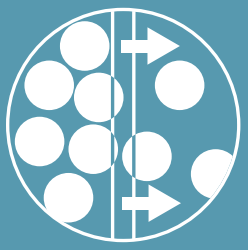
What Determines the Capacity for Continuous Innovation in Social Sector Organizations?

By Christian Seelos and Johanna Mair, Stanford PACS (produced for The Rockefeller Foundation) (January 31, 2012)
Shares an evidence-based model for generating continuous innovation in social sector organizations.

Porous Boundaries

The Bridgespan Group

Supported by The ROCKEFELLER FOUNDATION



Porous Boundaries

> **"Good ideas … want to connect, fuse, recombine … to reinvent themselves by crossing conceptual borders … When one looks at innovation in nature and in culture, environments that build walls around good ideas tend to be less innovative in the long run than more open-ended environments."**
>
> **STEVEN JOHNSON, *Where Good Ideas Come From***

Innovative organizations recognize that good ideas and new insights can come from anywhere. They look everywhere for new and old ideas, and then keep those ideas alive by sharing them, imagining new uses for them, and testing them out in different contexts.[21]

Organizations with porous boundaries have leaders and structures that encourage the free flow of ideas and information within the organization and between their organizations and the outside world. They actively fight against the intellectual insularity that often develops within teams, silos, and organizations.

To be an effective innovator, you should:

1. Listen to, learn from, and collaborate with the people you aim to serve

2. Bring a range of outside ideas and voices into your organization

3. Support the fluid exchange of information inside the organization

On the pages that follow, we outline ways to build capacity in these three areas and share an example of how BRAC, the world's largest development NGO, keeps its boundaries porous.

21 Andrew Hardagon and Robert I. Sutton, "Building an Innovation Factory," *Harvard Business Review*, May-June 2000.

IDEAS FOR ACTION

1A Listen to and learn from those you serve

Collecting feedback directly from the people you aim to serve allows organizations to focus on addressing people's most important needs, and to find out whether your initial assumptions, ideas, and propositions hold up to real-world testing.

Steps you can take

Consider all the tools at your disposal for communicating with the people you serve and capturing their input, from the simplest and cheapest, to the most cutting-edge and resource-intensive. Approaches you might consider include:

- **Approaches for getting rapid feedback that are light on technology,** e.g., community meetings, house visits, interviews, journals, and field surveys (For additional ideas, see Keystone Accountability's Learning With Constituents guide.)
- **Tech-enabled approaches,** e.g., online or mobile technology-enabled surveys and social media. Lean data is one example of an approach to collecting information from customers that is actionable for nonprofits and social enterprises, without being too onerous or costly (for the customer or the organization) to collect. (See Acumen Fund's The Lean Data Field Guide for more on this.)
- **Approaches that require deeper engagement or specific expertise,** i.e., ethnographic research, human-centered design (see IDEO's Field Guide to Human-Centered Design[22] for guidance on this) and identifying positive deviants (see the Positive Deviance Initiative's Basic Field Guide to the Positive Deviance Approach)

It's critical to choose the tools that best suit your end users. For instance, Oxfam recently piloted, and is now looking to expand, an informal feedback tool in the Za'atari Refugee Camp of Jordan, to electronically capture and manage feedback from the communities in which Oxfam works.[23]

To get started, take the Harwood Institute's The Turn Quiz, which is designed for nonprofits to reflect on how focused they are on internal organizational concerns versus on the people and needs outside of their organizations, and to develop plans for shifting focus where appropriate.

Resources required

Money: Varies depending on the tools used

Expertise: Varies depending on the tools used

Time: Varies depending on the tools used

22 IDEO describes Human-Centered Design as a creative approach to problem solving that starts with the people you're designing for and ends with new solutions that are tailor-made to suit their needs.

23 Emily Tomkys, "Building Trust Through Accountability," *Policy & Practice Blog,* Oxfam, December 14, 2016.

IDEAS FOR ACTION

1B Co-create solutions alongside those you serve

By taking steps to co-create programs or services alongside the people who will use those programs or services, you can get more ideas on the table, increase the odds of designing something that people will value and use, and build enthusiasm and buy-in for the new offerings before they're even launched.

Steps you can take

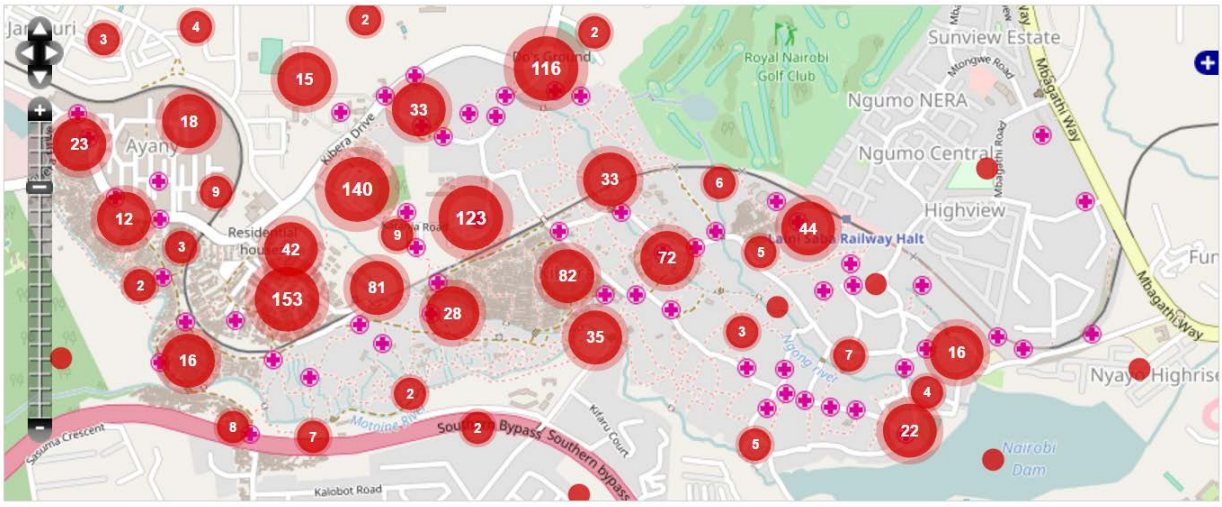
Girls from Prerna Girls School—a K-12 school for underprivileged girls in Uttar Pradesh, India—spent days with the program's facilitators to co-create and codify Prerna's Critical Feminist Pedagogy curriculum. This curriculum now reaches over 50,000 girls and has helped many of them to further their education and get better jobs. Prerna credits the effectiveness of the curriculum to the fact that it was created with the girls it is designed to benefit. Prerna is now co-creating a program for boys with young boys from the local community.

MapKibera is a powerful example of co-creation at scale. It is an open-source, community-based project to map Kibera, one of the world's largest informal settlements in Nairobi, Kenya. A number of nonprofits and government groups provided funding and infrastructure to enable locals to map unmapped areas of Kibera, and to facilitate coordination, planning, and advocacy between residents and the local government for health, education, security, and sanitation. The community participated in large numbers. Participant and former editor of the Kibera Journal, Douglas Nmale, speaks about his experience:

"When I saw the map for the first time, I was proud. This has not been done by other people. It has been done by me." [24]

Residents and NGOs have used the data to lobby for resources, negotiate with the police to improve security, and better hold the government, businesses, and anti-poverty projects accountable for their work.

MapKibera



Source: http://voiceofkibera.org/

Resources required

Money: Med | Expertise: Med | Time: High

24 See https://informationactivism.org/en/map-kibera-kenya.

IDEAS FOR ACTION

1C Engage constituents so they have more input and ownership over your work

The people who govern, lead, and manage nonprofits can become insulated from the voices, concerns, and influence of the people they serve. Over time, this can lead to products and programs that are well-intentioned but less effective or less relevant than they could be. Organizations can combat this by giving those they aim to serve more input and ownership over the programs and services that are provided to them.

Steps you can take

Consider giving your constituents greater say in how specific projects, or even your wider organization, are owned or managed. For example, you might consider setting a numerical goal on your Board of Directors for people drawn from the communities you serve or establishing an Advisory Board comprised of representative constituents.

The Bridgespan Group's article "From Input to Ownership" provides a starting point for nonprofits who want to think about how to engage their beneficiaries in this way. To get started:

- **Start with input:** Use the approaches and tools laid out in module 1A to listen and better understand your constituents and identify the special knowledge that they bring.
- **Once comfortable and informed, experiment with co-creation and co-ownership:** Examine where constituents can become more involved and identify some decisions they can either help you make or make on their own. Start with decisions where the objectives are clear and the outcomes can be easily assessed, so you can test how well the new process is working.
- **Ensure senior leaders participate:** If senior leaders in the organization engage with constituents and genuinely support their engagement, you are more likely to see benefits across the organization.

Resources required

IDEAS FOR ACTION

2A Convene diverse and creative groups

As Nobel Laureate Linus Pauling once said, "The best way to get a good idea is to get a lot of ideas." One proven way to get a lot of ideas is to bring together diverse sets of people—including some unusual suspects—to generate ideas or solutions to a problem.

Steps you can take

1. **Bring together people with diverse and divergent perspectives:** Challenge yourself to ensure at least 30 percent of the participants in any convening are new to your network. And ask yourself:
   - Do private sector actors play an important role in the area we will be exploring? If so, whom can we engage from the private sector, and how should we engage them?
   - Are we including people whose views and affiliations span the political spectrum?
   - Who will authentically represent the viewpoints of beneficiaries?
   - Is this an area where we can learn lessons from adjacent sectors—especially as it relates to innovation?
   - Can funders add a distinctive viewpoint here?


Photo: The Bridgespan Group

For example, a recent convening held by The Rockefeller Foundation on the subject of independent work in the United States assembled researchers, government leaders, leaders of software companies, major corporate employers, venture capitalists, technologists, labor organizers, social entrepreneurs, and nonprofit professionals. Participants learned from specialist expertise they hadn't encountered before, built new relationships, and left with a new understanding of what is happening in independent work, and new ideas for change.

2. **Think through the best format for unlocking new ideas:** Ensure that there is a clear objective for the convening—a problem to solve, a product to design—and that attendees understand this goal and find it compelling. Try to maximize the amount of thinking, discussion, and work that attendees do, as well as the number of people with whom they interact, and minimize the amount of time they spend listening to presentations in one large group. As IDEO recommends in its approach to design thinking, consider asking people to get many ideas on the table early in the session, before thinking more critically about the merits of different ideas and selecting a few to focus on or recommend.

   Gather: The Art and Science of Effective Convening, from The Rockefeller Foundation and the Monitor Institute, offers excellent guidance on designing productive gatherings. Or, consider using The Rockefeller Foundation's guide on Social Innovation Labs to design and deliver a multi-stakeholder approach to solving complex problems.

Resources required

IDEAS FOR ACTION

2B Crowdsource ideas

Technology and modern media makes it easier than ever to cast a wide net in search of ideas and insights. Open calls for ideas or proposals, hackathons, and competitive prizes and contests are becoming increasingly popular. These have proven effective and valuable for innovation, if certain design conditions are met.

Steps you can take

If you choose to crowdsource ideas, consider the following questions:

- How wide do you want to cast your net? Do you want to source ideas from your existing network or have an open call for ideas?
- What problem are you trying to solve? To get ideas that are relevant to your work, you'll need to be very clear about this.
- Will it be important for you to use crowdsourcing again in the future? If so, how will you build goodwill and momentum amongst the community you'll be relying on to crowdsource ideas? In particular, how will you recognize, use, and show appreciation for the contributions of all participants, including those whose ideas do not get chosen as winners?
- What methods and mediums are best suited for this exercise? If you need ideas that are quick and easy for people to generate and communicate, you can consider using social media or mobile phone-enabled channels like SMS. If the ideas you are seeking require more time-intensive thinking and articulation, you might want to build an online portal for people to answer a series of questions, create a competition or prize for ideas, host a hackathon, or invite people to a convening that lasts more than a few hours.

For more details, see McKinsey's reports on how to design effective prizes. Or, try to reframe your challenge to generate unexpected ideas by following the ideate mixtape guide from the Institute of Design at Stanford.

Resources required

IDEAS FOR ACTION

3 Encourage the exchange and advancement of knowledge across the organization

Innovation is driven in large part by surfacing as many ideas as possible, and keeping them alive long enough for them to be recombined with other ideas when relevant. Organizations that connect people and ideas, and establish systems for keeping ideas alive stand a better chance of innovating over the long run. [25]

Steps you can take

1. **Crowdsource ideas internally.** This is useful and easily done. At Bridgespan, consultants use a simple email list to source ideas from all other consultants in the firm. Anyone can post a question to the larger group, and anyone can respond. It's used daily for questions big and small. When people get answers to questions, they often share the results with the entire email list, so that everyone else benefits and learns too.
2. **Look for ways to triple the amount of intellectual cross-fertilization in your organization**, via such avenues as learning lunches, retreats, and rotation programs. Research suggests that innovation often emerges within communities of individuals who meet and then organize across functions and offices based on shared interests or aspirations (rather than shared origins or emotional ties).[26]
3. **Make people feel responsible for keeping ideas alive.** Seek out and support "knowledge champions" who see part of their role as breaking down barriers between silos of information. Knowledge champions know a lot themselves, know where information can be found, but most importantly, help broker connections between ideas, people, and teams. To ensure that the benefits of knowledge sharing are realized, consider making it a formal part of someone's job description.
4. **Establish information technology systems designed to source, store, and organize data and ideas** so that they are readily accessible. Consider setting up an internal website or wiki that enables staff members to browse and post materials that reflect their learning and ideas, or maintaining an "ideas bank" of pretested ideas, like Honda and Toyota do.[27] You could also use more customized software. For example, Oxfam uses the idea management software Crowdicity to crowdsource ideas and conduct organization-wide discussions, and Massive Open Online Courses to codify and disseminate training materials across its operations in 90 countries.[28] This report by the Monitor Institute shares examples of different knowledge management systems and approaches used in the nonprofit sector.

Resources required

25 Andrew Hargadon and Robert I. Sutton, "Building an Innovation Factory," *Harvard Business Review*, May-June 2000.

26 Celia de Anca and Salvador Aragón, "To Foster Innovation, Connect Coworkers who Share Aspirations," *Harvard Business Review*, July 14, 2016.

27 P N Rastogi, *Management of Technology and Innovation: Competing Through Technological Excellence*, (Sage Publications, 2nd Ed., 2009).

28 James Whitehead, *Unlocking Innovation: Enabling and Blocking Factors in Developing Innovative Programmes in Oxfam GB*, Oxfam GB, June 24, 2015.

WORKSHEET 1: A 360° scan for opportunities to foster the flow of ideas

From theory to action: what could you do to encourage porous boundaries...

Between your organization and your beneficiaries?		
	Activity	**Goal**
With current resources		
With more resources		

Between your organization and other external stakeholders?		
	Activity	**Goal**
With current resources		
With more resources		

Inside your organization?		
	Activity	**Goal**
With current resources		
With more resources		

CASE STUDY:

Listening and learning at BRAC, the world's largest NGO

> **"Since its inception, BRAC has focused on learning: from its successes and failures alike, from other NGOs, from clients and practitioners in the field."**
>
> **BRAC Innovation Overview[29]**

BRAC, based in Bangladesh, employs over 110,000 people in 11 countries and runs a range of services and social enterprises that reach 138 million people, mostly in rural areas.[30] BRAC has a track record of generating breakthrough new programs and then adapting and replicating them in different settings. Maintaining porous boundaries within their vast organization, as well as with the outside world, has been key to this success.

BRAC has a track record of generating breakthrough new programs and then adapting and replicating them in different settings. Maintaining porous boundaries within its vast organization, as well as with the outside world, has been key to this success.

Most new BRAC innovations emerge out of in-person engagement with end users, as its internal documents explain: "That's where we begin: Listening to our clients discuss the challenges in their daily lives, whether at community meetings, field visits, or cultural events hosted at BRAC's headquarters, or through SMS polls and web-based idea challenges."

In the mid-1970s, founder Sir Fazle Hasan Abed and his team observed that Bangladesh's homegrown chickens were small and sickly compared to their commercial competitors and did not yield as many eggs. The cause was linked to a lack of quality feed and poultry vaccines. Abed invested in producing affordable vaccines and developed a way to preserve the vaccines in cold packs made from banana peels, an ingenious low-cost solution that utilized abundant local resources. As healthy, vaccinated chicks became more plentiful, Abed observed a growing need for high-quality and inexpensive poultry feed. He intervened again to cultivate and distribute maize as a practical and sustainable feed source. The result was a massive increase in productivity in the poultry industry.[31] In general, BRAC has maintained a similar innovation feedback loop, in which BRAC listens, learns, pilots a new solution, and then keeps listening. Each new solution begets the next challenge to solve.

BRAC is also deliberate about listening and learning from other organizations. For instance, BRAC's Social Innovation Lab scans for external innovations that could change how BRAC works.[32] It uses competitions to surface ideas for mobile money-related innovations from inside and outside BRAC, competitions which have led to a range of pilot mobile money programs for end users, and a set of internal efforts to harness digital

29 "Innovation at BRAC," BRAC, 2016.

30 "Where we work," BRAC.

31 "Sir Fazle Hasan Abed," The World Food Prize 2015.

32 "Social Innovation Lab," BRAC.

literacy to enhance operational efficiency and service quality.[33] They also host a variety of forums for peers and practitioners outside BRAC, such as the Frugal Innovation Forum.

Through a culture of learning and sharing ideas internally, BRAC reinforces its more outward-looking efforts. Its longstanding Research and Evaluation Division supports its Social Innovation Lab in codifying and disseminating learning across the organization. A culture of storytelling and collective folklore—fueled by the long tenure and rich on-the-ground experiences of most BRAC employees—strengthens BRAC's institutional memory. The net effect: "Information is always flowing throughout the organization … there is constant discussion between programs, whether at learning sessions or informally in the lunchroom or over a cup of tea."

Many nonprofits listen to their beneficiaries and to other organizations. Many excel at sharing ideas and learnings internally. But BRAC is distinctive in the scale of its investments in both areas, and in the strength of the values and expectations it has maintained, across sites, around listening and learning to others.

33 "The Innovation Fund for Mobile Money," BRAC.

Additional Resources

Building an Innovation Factory

By Andrew Hargadon and Robert Sutton, *Harvard Business Review* (May-June 2000)

The authors argue, based on five years of studying businesses that constantly improve, that the ability to "broker" (i.e., exchange) knowledge and keep ideas alive is critical to sustaining innovation.

Challenge Prizes: A practice guide

By Perrie Ballantyne in collaboration with the Centre for Challenge Prizes, Nesta (2014)

Challenge prizes offer a reward to whoever can first or most effectively solve a challenge. This provides a guide for running them.

Feedback Labs Toolkit

Feedback Labs

This online toolkit includes quizzes, instructional guides, and technology tools to help close feedback loops in aid and philanthropy.

Gather: The Art and Science of Effective Convening

The Rockefeller Foundation and Monitor Institute (June 26, 2013)

Provides tools, worksheets, and examples to host an effective social sector convening.

The Lean Data Field Guide

Acumen Fund (November 2015)

Provides case studies and an instructional guide for nonprofits and social enterprises who want to collect feedback from customers and beneficiaries in a lean, tech-enabled way.

Where Good Ideas Come From: The Natural History of Innovation

By Steven Johnson, Riverhead Books (2010)

Where good ideas come from

With Steven Johnson, TEDGlobal talk (July 2010)

Both the book and this talk apply insights from biology and history to argue that ideas come from environments that are collaborative, networked, and rich with information.

Ready Resources

The Bridgespan Group

Supported by The ROCKEFELLER FOUNDATION

Ready Resources

"The single biggest challenge for innovation in an organization like Oxfam is carving out time to work on the future, instead of being caught up in the tyranny of the present."

James Whitehead, Innovation Advisor, Oxfam Great Britain[34]

Innovations can and do emerge in environments where resources are either scarce or frugally deployed. But our research, interviews, and survey results suggest that if nonprofits are to generate innovation repeatedly over time, they need to carve out dedicated funding and time specifically for innovation or R&D efforts, and potentially make supporting investments in technologies, tools, and training.

Nonprofits face a particular challenge when it comes to securing the ready financial resources needed to support innovation. Many rely heavily on restricted grants or contracts tied to specific programmatic activities or outputs (e.g., numbers of people served). Such funding typically constrains an organization's ability to experiment with new approaches or make major course corrections.[35] All too often, restricted grants don't cover the full cost of developing and delivering programs, because overhead costs such as R&D and marketing may not be fully reimbursed. As a result, nonprofits with little unrestricted funding become overly focused on the present (versus the future) and underperform on innovation versus peers with more unrestricted funding.[36]

To excel at innovation over time, nonprofits should:

1. **Carve out financial resources to source and test promising ideas**
2. **Structure staff roles to allow a focus on innovation while also delivering on present programs and operations**[37]
3. **Make smart investments in technologies, tools, and training**

The following pages outline steps you can take to get started in these three areas, as well as an example from the multinational nonprofit Oxfam.

34 Ben Ramalingam and Kirsten Bound, *Innovation for International Development: Navigating the Paths and Pitfalls*, (Nesta, April 25, 2016).

35 Jocelyn Wyatt, "When Restrictions Apply," *Stanford Social Innovation Review*, March 18. 2015

36 Fiona Waters, "The Health Check Big Picture," Bond, March 22, 2016. Similarly, Nesta argues that innovation in international development "requires funding methods that are more accepting of risk, more flexible to pivots in approach, more patient for returns, and which come combined with complementary resources like support, advice, and training." See Ramalingam and Bound, *Innovation for International Development*

37 Mehdi Darini, Hashem Pazhouhesh, and Farshad Moshiri, "Relationship Between Employee's Innovation (Creativity) and Time Management," *Procedia - Journal of Social and Behavioral Sciences*, 25 (2011): 201-213.

Ideas for Action

1A Determine the right strategy for funding your innovation efforts

To fund innovation over the long run, you need a repeatable approach customized for your organization's financial model and funding environment.

Steps you can take

Depending on your economic model and relationship with funders, you might consider three different strategies for funding your innovation and innovation capacity efforts on an ongoing and sustainable basis.

1. **Apply for funds that support innovation:** Funders can and do provide funding explicitly for innovation. They look for organizations that have a clear and credible plan for converting innovation funding into impact, as well as the supporting capabilities and processes needed to implement that plan well. If you are well-positioned to make this case, engage funders whose interests overlap with yours and work closely with them to strengthen your plans and priorities around innovation. You'll likely need to assemble a mix of anchor funders, who will fund your overall R&D unit, and supporting funders who'll fund specific areas of innovation. Reference 1 on page 47 provides an example of an effective experimentation proposal.

To test out the viability of this approach, ask your existing funders what they would need to know in order to provide direct support for innovation or R&D at your organization.

2. **Build the cost of R&D into the pricing of your programs and services:** If you generate revenue from earned income, social enterprises, or other fees, another option is to treat the cost of investing in innovation as one of the many embedded in the cost of those services. Similarly, you could try to factor these costs into the "price" you quote funders for grants. The viability and long-term sustainability of this approach depends on your ability to command prices that will cover these costs.
3. **Explore different funding models:** If the options above don't seem viable, or if you see opportunity in thinking more creatively, then it might be time to innovate around your funding model itself. Some approaches that better lend themselves to generating flexible operating funds include launching income-generating commercial ventures (as BRAC did), cultivating relationships with many individual donors through events, networking, and targeted outreach, and using online crowdfunding platforms like Kiva, GiveIndia, and GlobalGiving.

Resources required

Ideas for Action

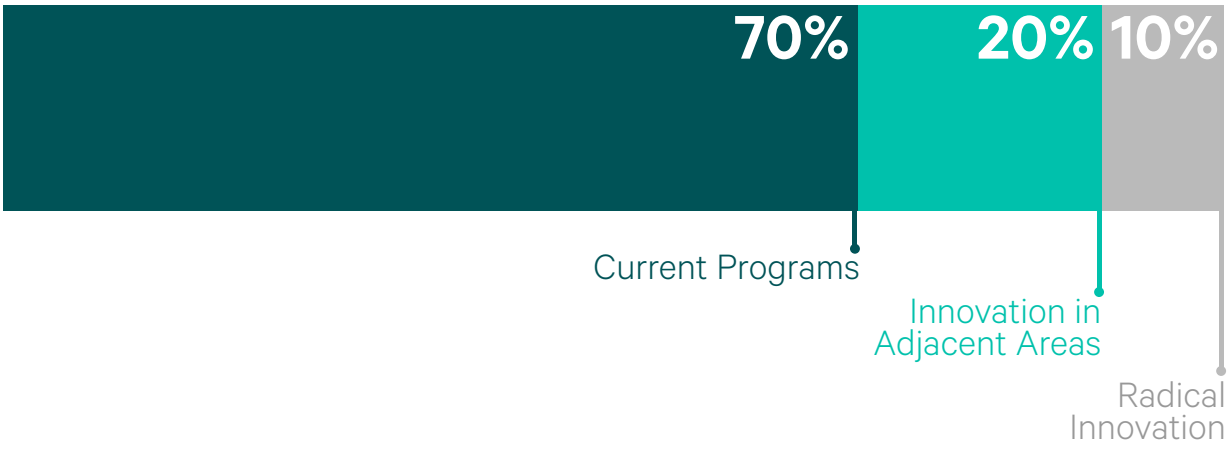
1B Decide how much of your budget you need to invest in innovation

To fund innovation well, you'll need to get clear on how much of your budget you want to invest in adjacent and radical ideas. One Acre Fund, for example, uses the 70-20-10 model pioneered by Google and now widely adopted by many organizations. It dedicates 70 percent of its investment to existing programs, 20 percent to adjacent innovation projects, and 10 percent to more radical innovations. And it monitors and measures the social return on its investments, to maximize its impact and demonstrate the value of its approach to funders.[38]

Steps you can take

To determine which investment allocation makes sense for you, start with the 70-20-10 ratio, and then ask whether your organization needs relatively more investment in its existing programs or in innovation. For example, an early-stage organization might focus more on proving and growing its core business. An established and thriving organization might land right at 70-20-10. And a maturing organization with a declining core business, whose very survival is contingent on innovating, may need to allocate more than 30 percent of its resources to innovation. One Acre Fund's example (see page 13) demonstrates how powerful it is for an organization's leadership to establish such targets and commit to achieving them.

70-20-10 INVESTMENT ALLOCATION RATIO



Resources required

38 Interview with Matt Forti, Managing Director of One Acre Fund USA, January 2017.

Ideas for Action

1C Choose who will receive the innovation funding, and how

If you can get clear on which people, teams, or units within your organization could drive innovation efforts and the outcomes you seek, you are more likely to design funding structures that support them. Choices about who is controlling and receiving innovation funding and why should be clear and understandable to stakeholders across the organization—especially those who do not receive additional funding.

Steps you can take

Depending on what best fits with your innovation goals and organizational structure, you might allocate funding to some or all of these groups.

1. **A dedicated innovation team:**

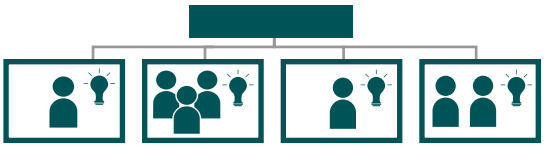
   If a dedicated team will lead most of your innovation efforts and manage how innovation resources are used, you can fund that group directly.

2. **Specific programs, geographies, or other organizational units:**

   If your aim is to stimulate innovation within specific segments of your organization, you might provide those segments with dedicated funding for research and development.

3. **Anyone in the organization with compelling ideas:**

   If you simply want to surface and fund the best ideas, wherever in the organization they come from, you could make funds available more broadly to anyone in the organization. Internal competitions and open application processes could be useful tactics here.



Resources required

REFERENCE 1: Writing proposals to fund experimentation

Most organizations have experience securing restricted grants for programmatic purposes. Writing a grant proposal for experimentation requires similar skills but a slightly different approach. Unlike typical programmatic grants, experimentation grants should be organized primarily around testing important hypotheses and capturing useful learning. As in funding scientific research, the grantee's main objective and responsibility is to effectively and efficiently validate or invalidate important hypotheses, rather than to deliver certain outcomes or "products."

The excerpts below are from a one-year experimentation grant proposal to a funder for building a new national immigrants' association. The grant proposal was prepared by the Center for Community Change (CCC) and FIRM, a coalition of 44 immigrant-serving organizations. This example illustrates how to structure funding and the work it supports to test critical hypotheses, in order to capture information that should help you achieve a larger strategic or programmatic goal.

- **Long-term Goal:** Develop a scalable (deep, lasting, financially self-sustaining) model for organizing immigrants around social justice issues.
- **Intermediate Strategy:** Develop services for immigrants that create deep, lasting member relationships and are financially self-sustainable.
- **Initial Hypotheses:** Based on 200 member interviews, secondary market research, and staff feedback, CCC and FIRM have identified and prioritized testing of more than 20 possible services for immigrants including legal services, English classes, health debt reduction, and financial services.
- **Grant Activities:** Over a one-year period, experiment with at least 12 possible services for immigrants in three regions using the lean start-up methodology.
- **Grant Output:** Validate or invalidate 12 possible services based on criteria of a) demand from immigrants, b) impact on immigrants' lives, c) depth of member relationship development, and d) financial sustainability.
- **Grant Outcome:** Identify one to two scalable services for immigrants that will be further tested.

Source: "Funding Radical Experimentation: A toolkit for funders who want to catalyze transformative social change," (Accelerate Change, 2015).

Ideas for Action

2A Establish full-time innovation teams and roles

Innovation often gets lost within an organization's day-to-day business. Leaders can help break this cycle by ensuring time and accountability for innovation is assigned to dedicated innovation teams, units, labs, or officers. BRAC, IRC, One Acre Fund, Oxfam, UNICEF, and many others have chosen this path. A core innovation team can take on a range of responsibilities, from building innovation capacity to incubating individual innovation ideas (see diagram on next page).

Steps you can take

While such innovation units can be very effective, there are some common roadblocks to overcome and strategic decisions to make. Six key questions to consider when launching an internal innovation unit include:

Questions	Notes
1. What roles will this unit take on?	Get clear on what this team will and won't do. Start by keeping the role narrow, and explore ways to expand it over time.
2. How will the unit measure effectiveness and demonstrate its value?	It may be difficult to attribute specific innovations or results to this unit alone. In the near term, you might want to assess the unit based on its approach, the value of what it's learning, and the quality of new ideas that emerge, rather than against specific results.
3. What will you call this unit?	Language can matter. Sometimes "Innovation Team" can make others feel defensive ("I've been innovating all these years!"). Some ideas include "Innovation Support Team" or a completely new name, like IRC's Airbel.
If the unit is to succeed:	
4. What capabilities will it need to develop?	Consider staffing the unit, at least partially, from within the organization, to maximize organizational knowledge and buy-in. Ensure your team is diverse across many dimensions (see the module Diverse Teams on page 14).
5. What relationships and networks will it need to develop?	Consider the internal and external relationships critical to the unit's effectiveness.
6. What will it need to do in its first six months?	Establishing awareness and credibility within the organization will likely be key. Ideas for more specific goals include meeting, listening, and learning from stakeholders inside and outside the organization; identifying existing assets and previous innovation successes; and finding "quick wins" to start demonstrating value to the organization.

Resources required

Ideas for Action

2B Distribute responsibilities and time allocations for innovation

When creating a full-time innovation team is not feasible or desirable, an alternative approach is to distribute responsibilities by redefining staff roles so that they can dedicate some of their time to innovation.

Steps you can take

One approach is to carve out the time first and see what people do with that time. Kiva does this by having engineers dedicate 20 percent of their time to "innovation iterations."

Alternatively, you could set up mechanisms for staff members to make the case for allocating parts of their time to innovation, based on specific ideas or projects on which they want to work.

To get started, complete the table below for your organization.

Consider people in different roles. Ideally, who would be focused on innovation work and how much of their time would they be spending on it? What will be taken off of their plate, to free up time for innovation?

Person or position	Ideal role in innovation work	Ideal time commitment to innovation work	What will be taken off his or her plate to free up time for innovation?
E.g., Head of Programs	*E.g., Recommends new innovation projects (among others) and manages approved projects*	*E.g., 5%*	*E.g., Fundraising activities*

Resources required

Money: Med


Expertise: Med


Time: Med

REFERENCE 2: Internal innovation units can take on a range of roles, depending on the needs of the organization

Ideas for Action

3A Make use of proven innovation tools and techniques

People can be taught ways of thinking and working that are proven to help generate and refine new ideas.

Steps you can take

Identify the techniques most relevant to your work, and give staff training to use them effectively. Integrate that training into the onboarding and training experiences that all staff receive and encourage staff to practice and apply these techniques.

Some tools and resources to start with include:

- DIY toolkit: Nesta's "Development Impact and You" toolkit provides a range of approaches for innovation in an international development context.
- Developmental evaluation techniques: The J.W. McConnell Family Foundation designed "A Developmental Evaluation Primer" explicitly for nonprofit practitioners, to help people learn and adapt in ways that help design new programs, or radically redesign existing ones.
- Human-centered design: IDEO's "Human-Centered Design Toolkit" was created for designing products and solutions with humans in mind.
- Innovation labs: Bridgespan and The Rockefeller Foundation's "Innovation Labs Insight Center" collects learnings on innovation labs, which are physical or virtual spaces that support innovation.
- Lean data tools: Acumen's "Lean Data Field Guide" enable nonprofits to communicate with and collect feedback directly from customers and beneficiaries using limited resources.
- Lean start-up: An approach to entrepreneurship that has been widely adopted and is relevant to anyone looking for breakthrough ideas, whether in a start-up or an established organization.
- Systems thinking: A free 10-week course by +Acumen and the Omidyar Group, which introduces the systems thinking approach—a way to make sense of complex environments and uncover meaningful dynamics

Resources required

CASE STUDY:

Accessible resources for innovation at Oxfam International

> **"Our vision is that our people will feel more empowered, having more time, encouragement and resources for innovation and risk taking"**
>
> **Mark Goldring, Chief Executive, Oxfam Great Britain[39]**

Oxfam International is a confederation of 19 NGOs working in over 90 countries to eradicate poverty through advocacy, development programs, and disaster relief. To support innovation across its federation, Oxfam works to ensure that staff have time allocations and flexible funding for experimentation, and that they have access to useful techniques, tools, and technologies.

- **Funding:** Oxfam works hard to provide its programmatic teams with dedicated, flexible funding for innovation. Its leadership team ensures that funding for new program development is safeguarded during the annual budget process. And its fundraising teams engage donors in debate around the value of making restricted grants more flexible, and are launching pilots to test the potential of new funding mechanisms, including Development Impact Bonds and impact investing. The flexibility of funding from donors such as the UK's Department for International Development has enabled Oxfam to develop programs it would not have been able to develop under more rigid funding structures.[40] An example is the Mariposa Foundation's support for Oxfam's WASH innovation fund, which provides flexible funding and technical assistance for innovation in water, sanitation, and hygiene promotion in emergencies.[41] The fund enables Oxfam to quickly identify, evaluate, and support good local solutions to problems. Projects can be funded in any of the 90 countries where Oxfam has programs.[42]
- **Time:** Oxfam's study of internal barriers and enablers to innovation found that setting aside staff time for innovation is paramount.[43] To help staff escape "the tyranny of the present," it is—among other things—selecting country staff to be taken out of their-day-to-day routine for an immersive experience focused on innovation.[44] These "Impact@Scale accelerators" are designed to support staff in developing new perspectives on their work and shaping initiatives with the potential to significantly increase Oxfam's impact, influence, or income. The accelerator in Africa brought together 22 participants from nine countries—and four senior staff—to develop new initiatives in line with country strategies. Over a six-month process, participants learned new tools, exchanged ideas, and developed new program concepts, which they then took back and championed with their teams.[45]

39 From Mark Goldring's June 2015 vision document, cited in "TOR – facilitating the HECA Impact@Scale accelerator" (Oxfam, 2016).

40 *Oxfam's DFID General PPA Year Three Annual Review* (Oxfam GB, October 2, 2014).

41 James Whitehead, *Unlocking Innovation: Enabling and Blocking Factors in Developing Innovative Programmes in Oxfam GB* (Oxfam GB, June 24, 2015).

42 "Oxfam GB's Research, Development, and Innovation Fund for Water, Sanitation, and Public Health Promotion" (Mariposa Foundation).

43 Whitehead, *Unlocking Innovation*.

44 Ben Ramalingam and Kirsten Bound, *Innovation for International Development* (Nesta, April 25, 2016).

45 "TOR – facilitating the HECA Impact@Scale accelerator" (Oxfam, 2016).

- **Training, tools, and technologies:** Country-level staff and partners are equipped with toolkits, training, and advisory support to enhance the design of new programs, using techniques such as power analyses, stakeholder analyses, and theories of change. For instance, Oxfam's Vulnerability and Risk Assessment toolkit helps staff analyze the root causes of vulnerabilities.[46] The Impact@Scale accelerator introduces participants to such tools and concepts as innovation stages; support mapping; ideation, power and influence; routes to scale; working with unusual suspects; and building networks.[47] In addition to trainings like these, Oxfam has made use of Crowdicity, Workplace, and other software tools to facilitate the exchange and development of new ideas.[48]

46 Daniel Morchain and Frances Kelsey, *Finding Ways Together to Build Resilience: The Vulnerability and Risk Assessment Methodology* (Oxfam GB, January 15, 2016).

47 "TOR – facilitating the HECA Impact@Scale accelerator" (Oxfam, 2016).

48 James Whitehead, "Unlocking innovation: hamster wheels & fly wheels," *Policy and Practice Blog*, Oxfam, February 15, 2016.

Additional resources

Innovation for International Development: Navigating the Paths and Pitfalls

By Ben Ramalingam and Kirsten Bound, Nesta (April 2016)

Guide for international development agencies and other NGOs looking to develop new solutions to problems. Includes sections on how to fund, organize, partner for, and scale innovation.

Innovation Labs Insight Center

The Bridgespan Group and The Rockefeller Foundation, Bridgespan.org (December 2014)

Collection of blogs exploring innovation labs' potential to generate new solutions to pressing problems both quickly and efficiently.

Little Bets: How Breakthrough Ideas Emerge from Small Discoveries

By Peter Sims, Simon & Schuster (July 16, 2013)

The author argues in this book that instead of progressing forward through giant leaps and bounds, some of the most well- known innovators—Steve Jobs or Frank Gehry—developed their new ideas by taking small steps forward, readjusting, and learning as they went.

The Promise of Lean Experimentation

By Peter Murray and Steve Ma, *Stanford Social Innovation Review* (Summer 2015)

Explains how quickly and efficiently testing new ideas could lead to significant social impact. Includes frameworks, examples, and best practices on the topic.

The Re-Emerging Art of Funding Innovation

By Gabriel Kasper and Justin Marcoux, *Stanford Social Innovation Review* (Spring 2014)

Explores how leading philanthropies fund innovation in the social sector and shares recommendations to consider innovation during the philanthropic process.

Unlocking innovation: hamster wheels and fly wheels

By James Whitehead, Policy & Practice Blog, Oxfam GB (February 15, 2016)

Provides a framework to explore the trade-offs between investing resources in an uncertain future versus meeting the demands of the here and now.

Unlocking Innovation: Enabling and blocking factors in developing innovative programmes in Oxfam GB

By James Whitehead, Oxfam GB (June 24, 2015)

This in-depth case study of innovation at Oxfam GB focuses on new ideas that helped the organization access new sources of funding and expand its network.

Curious Culture

The Bridgespan Group

Supported by
The ROCKEFELLER FOUNDATION

Curious Culture

"If your goal is innovation, then [you must] create an environment … where people are willing and able to do the hard work of innovation themselves: to collaborate, learn through trial and error, and make integrated decisions."

LINDA A. HILL, *Collective Genius: The Art and Practice of Leading Innovation*

The idea of the lone genius innovator is a myth.[49] Creative individuals are necessary but not sufficient for organizations to sustain innovation.

Likewise, dedicated resources, processes, and special initiatives designed to spur innovation can fall short in the absence of something that is difficult to measure but conspicuous when absent: a culture that supports innovation. Indeed, in large surveys, business leaders consistently report that culture is more important to innovation in their organizations than all other factors.[50]

Stated another way: to innovate, **"you have to have the culture,"** said Google Chairman Eric Schmidt, **"and you need to get it right."**[51]

So what does the right culture for innovation look like?

An organization's culture is based on employees' shared beliefs.[52] In innovative organizations, employees typically believe that ideas should be openly shared and challenged, that people should take smart risks, and that failures should be seen as valuable learning opportunities.[53] And these organizations also often provide physical spaces that foster and reinforce these kinds of beliefs and behaviors.

To change the beliefs that shape your culture, focus your efforts in three areas:

1. Encourage critical thinking, debate, and experimentation

2. Foster communication, collaboration, and trust

3. Rethink your physical space

49 Greg Satell, "It's Time to Bury the Idea of the Lone Genius Innovator," *Harvard Business Review*, April 6, 2016.

50 Barry Jaruzelski, John Loehr, and Richard Holman, "The Global Innovation 1000: Why Culture Is Key," *strategy + business*, October 25, 2011; *Unleashing the power of innovation* (PwC 2013).

51 "Creating a Culture of Innovation: Eight ideas that work at Google," Google.

52 Edgar H. Schein, *Organizational Culture and Leadership (4th Edition)* (Jossey-Bass Business & Management Series, 2010).

53 David Burkus, "How to Tell if Your Company Has a Creative Culture," *Harvard Business Review*, December 2, 2014.

IDEAS FOR ACTION

1A Debate ideas and assumptions

Most people shy away from confrontation, and feedback sessions and debates can easily collapse into unproductive disagreement. But feedback and debate are needed to prevent organizations from becoming complacent. If your organization seems artificially harmonious, it's unlikely to sustain innovation over time.

Steps you can take

Consider training managers to encourage constructive conflict rather than avoid it, then support their development in this area.[54] By asking questions rather than being directive or instructive with their teams, managers can build their teams' critical thinking capabilities, confidence, and sense of ownership. Using inquiry can also demonstrate the value that the organization places on curiosity, and empower staff to question the assumptions and assertions of people around them. (See "How to Ask Better Questions" on *Harvard Business Review's* website for guidance for managers on how to ask more effective questions.)

People managing teams might also consider introducing specific facilitation tools that explicitly value candor or debate, such as the Braintrust used by the animation studio Pixar, or de Bono's Six Thinking Hats approach, which is described in the DIY Toolkit.

Alternatively, Wharton School professor Adam Grant suggests that, instead of assigning people to play the devil's advocate in meetings, you should "find people who genuinely hold minority opinions and invite them to present their views."[55]

Anonymity can be helpful for surfacing uncomfortable feedback on ideas. Google maintains an internal survey called Googlegeist, which solicits anonymous feedback on hundreds of issues. It has a response rate of over 88 percent, partly because it treats staff not as subjects but as co-experimenters and problem-solvers. Once the results are in, Google enlists volunteer employee teams to solve the biggest problems that emerge.[56]

Resources required

54 Joann S. Lublin, "The High Cost of Avoiding Conflict at Work," *The Wall Street Journal*, February 14, 2014.

55 Adam Grant, *Originals: How Non-Conformists Move The World* (New York: Penguin, 2016).

56 Tim Fernholz, "Inside Google's culture of relentless self-surveying," *Quartz*, June 26, 2013.

IDEAS FOR ACTION

1B Embrace failures and setbacks as learning opportunities

When projects fail that failure typically contains some useful learning—especially if the project was structured from the outset as an experiment designed to prove or disprove an important hypothesis. Organizations that can acknowledge failures and learn from them are better set up to innovate over time.

Steps you can take

To build such a culture, leaders must be the first to make themselves vulnerable by publicly sharing lessons they've learned from efforts that have fallen short of expectations or otherwise went awry. Once they've set an example, leaders might consider rewarding people in a visible way for acknowledging and learning from mistakes and missteps. For instance, Procter & Gamble's Heroic Failure award honors the employee or team who presents the failure that delivered the greatest insight. The Hewlett Foundation holds an annual meeting where each program or department shares their experiences of a failed strategy, grant, or project with the entire staff. They then break into small teams to identify lessons learned and opportunities for improvement.[57] (See Beth Kanter's *Harvard Business Review* article, "Go Ahead, Take a Failure Bow" for more examples of how nonprofits celebrate their failures.)

Visible events like these signal to an organization that it's okay to fail, and that it's important to learn from it. But the learning mustn't start and end here. Look for ways to systematically document learnings and revisit them on an ongoing basis, so that you avoid repeating the same mistakes.

Resources required

57 Sara Davis, "Learning from Failure," The Hewlett Foundation, August 20, 2014.

IDEAS FOR ACTION

2 Enable communication, collaboration, and transparency

Open communication and transparency is good practice in most contexts, and an essential prerequisite for innovation. For this reason, Google has embraced the following philosophy:

> **"We believe that collaboration is essential to innovation and that it happens best when you share information openly. So as a company, we share as much as possible with employees and strive for transparency."**[58]

Because innovation work often involves risk-taking, mutual support and trust is likely to be an important precondition.

Steps you can take

For people to communicate and share feedback in all directions, leaders and managers can pave the way—modeling good behavior by sharing information and soliciting feedback and ideas from others. (See Glen Llopis' *Forbes* article, "5 Ways Leaders Enable Innovation in Their Teams" for more on how leaders can create a culture of innovation.)

Specific steps that leaders and managers can take include:

- having executives and managers sit alongside more junior staff;
- holding regular town hall meetings at which staff can ask leadership any questions they want (Google has been doing this since it was founded; Kiva, a nonprofit organization that enables online lending to low-income entrepreneurs and students globally, does it on a monthly basis);
- holding all-staff offsite meetings and retreats; and
- collecting feedback from employees via anonymous surveys.

Leaders can also write regular updates for staff or share minutes from meetings. People are also generally more likely to collaborate and communicate when they know and trust each other. So facilitating interaction across teams and offices is important. The BRAC Social Innovation Lab hosts informal, no agenda meetups for "questions, dialogue, reflection, and building relationships" among staff of the international NGO BRAC across different programs every few months in various locations.[59] (For an overview of how social technologies can enhance communication and collaboration, see McKinsey's "How social tools can reshape the organization".)

Finally, don't forget the fun factor! A playful but considerate tone also goes a long way to building trust-based relationships. (See "25 Low Cost, Creative Ideas to Improve Morale, Enhance Productivity, and Make Your Workplace More Fun!" for 10 team-building activities, and "52 Ways to Have Fun at Work" for ideas on how to inject fun into the workplace.)

Resources required

58 "Creating a Culture of Innovation," Google.

59 Fostering Innovation, BRAC Social Innovation Lab.

IDEAS FOR ACTION

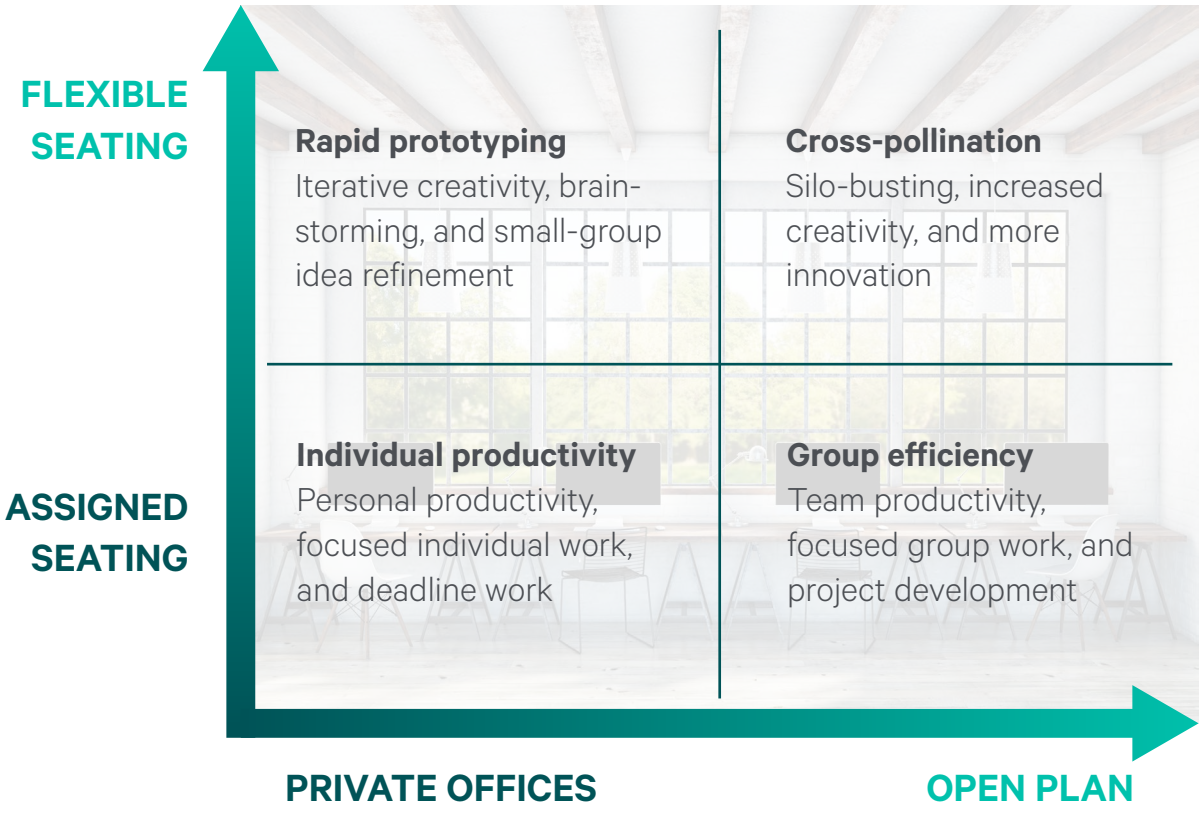
3 Rethink your space

The way physical spaces are designed sets a tone. Open floor plans and communal spaces make it easier for people to communicate and work together. Spaces such as these suggest to employees that collaboration is expected and desirable. These design elements also increase the number of chance encounters, which are integral to sparking new ideas.[60]

Steps you can take

Kiva combines personalized desks with spacious lounges that have ping-pong tables and whiteboards. They also have a "Table of Wonders," in which people bring in treats from global trips, items made by Kiva borrowers, or food items to share across the office. This creates an opportunity for connection.

You also could explore "hot desking," where employees can make their entire office their work space, (although this practice can have mixed results on morale and productivity) and setting up dedicated spaces for creative work (these might contain more toys, tools, and other stimuli than places for more focused work). "Inside the Latest Office-Design Craze: Hot Desking" describes the practice in more detail and "The Science Behind Your Ideal Work Environment" shares specific design ideas. "Workspaces That Move People," from the *Harvard Business Review*, offers a beginner's guide to designing spaces to suit different purposes, summarized below:



Resources required

60 Laura He, "Google's Secrets of Innovation: Empowering Its Employees," *Forbes Magazine*, March 29, 2013. See also: Ben Waber, Jennifer Magnolfi, and Greg Lindsay, "Workspaces That Move People," *Harvard Business Review*, October 2014.

CASE STUDY:
Keeping Kiva curious

"Kiva is a collaborative, flat, flexible organization that is first and foremost made up of people who like to teach and learn."

Software engineer at Kiva

Kiva, founded in 2005, is the world's first and largest nonprofit microlending website. As the organization has scaled and matured, it has maintained a culture of curiosity that has kept it on the cutting edge of microfinance, innovating to make borrowing cheaper and more flexible for individuals and small businesses around the world.[61] At the time of writing, more than 1.6 million Kiva lenders had lent $979 million to disenfranchised borrowers.[62]

And, people love working there.[63] From the outset, Kiva's leadership has tried to provide staff with both a sense of "psychological safety," so they feel secure enough to take risks and initiate new projects, and a sense of ownership, so they feel motivated to see those projects through. Kiva Co-founder Premal Shah noted: "People are more committed to an idea when it is theirs. At Kiva people feel like owners, and that they are running with their idea. In an environment where we cannot pay people like in a for-profit business, that matters."

At the same time, people are rewarded for delivering results. "Our culture rewards initiatives that are successful in the long term, but there are also positive feedback loops along the way to encourage progress on new ideas, even if it isn't something the firm directly invests in," Shah said. For example, people across Kiva enthusiastically participate in its Innovation Iteration, in which Kiva's engineers do a two-week sprint to pilot new innovations suggested by Kiva's staff. (See Kiva's blog post, "Kiva Engineering: Innovation Iteration," for more details.)

Transparency and collaboration are respected norms. "I like managing out in the open," Shah said. "We identify the key performance metrics and … compare colleagues against each other publicly, not to shame, but to create public accountability. The secrecy stuff doesn't work and is not part of our culture." Staff around the globe are encouraged to share ideas with each other, using collaboration software like Atlassian and Google Docs, and by sharing data, insights, and stories captured directly from borrowers by field offices. As an employee benefit, staff in the United States are funded by Kiva to regularly visit field offices, partners, and borrowers in other countries. And in addition to making data and performance metrics visible across teams, Kiva makes as much data as possible available for programmers and the wider public to work with, via the Kiva API.

Finally, as the pictures on the next page illustrate, Kiva's colorful and open offices reflect and reinforce the spirit of collaboration, experimentation, openness, and fun that permeates Kiva's culture. The physical environment mirrors the culture that Kiva is striving toward.

61 "About us," Kiva.

62 "Our impact," Kiva.

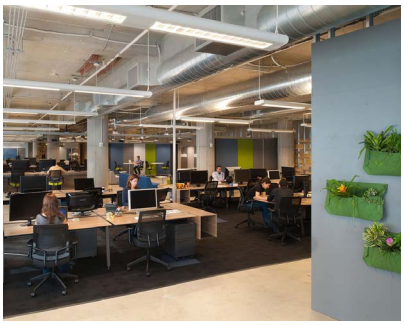
63 "Working at Kiva," Glassdoor. As of January 29, 2017, 84 employees had reviewed Kiva.org on Glassdoor. Ninety-nine percent would recommend working at Kiva to a friend, and 100 percent approve of the CEO. On average, employees rated Kiva as 4.6 out of 5 overall, 4.8 out of 5 on culture and values, and 4.8 out of 5 on work-life balance.

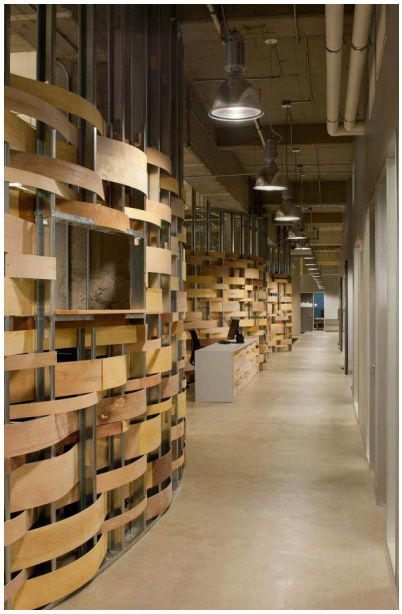
Kiva's model of employees-as-owners relies, to an extent, on hiring people who are intrinsically motivated and able to exercise independent judgment on a daily basis. When it comes to innovation, Kiva's leadership must trust their employees to launch and lead useful projects. It's an approach that has some risks and trade-offs, but it has worked well for Kiva so far.

"It is so hard to go beyond an organization's original innovation," noted Shah, "because it takes so much effort to just maintain and scale the first one. But, by providing people with a sense of ownership and psychological safety, we have been able to scale our initial idea and pretty regularly introduce some important new ones. For example, our original model was to channel microloans to borrowers via microfinance institutions, who acted as intermediaries between us and the eventual borrowers. But as we grew, we saw that more of our target borrowers were becoming digitally connected, without being served by microfinance institutions. This led a small group of people at Kiva to explore whether we could reach those people directly, through technology, at a lower cost."

In addition to being the first model for direct lending on Kiva, the pilot solution this small team developed, after much trial and error, tested an alternative method for small businesses to demonstrate their creditworthiness: social underwriting. To access Kiva funds, borrowers must find a set number of people (typically 15-20) willing to lend money to them. Now out of the proof-of-concept phase, this model enables Kiva to channel direct loans to small businesses excluded from traditional financial markets, without the use of an intermediary. It has served more than 3,100 digitally connected, financially excluded small businesses in the United States, and is today generating nearly half of the new lenders joining Kiva.

Kiva's offices





Notes and Sources: All images are from the Office Snapshots profile of Kiva's office redesign by the firm STUDIOS Architecture. See here for the full profile and article, which explains in more depth the architectural and design choices that STUDIOS and Kiva made.

Additional resources

Are you a giver or a taker?

With Adam Grant, TED@IBM (November 2016)

Explores the value of creating a giving culture and provides practical tips to do so through case studies.

Creativity, Inc.

By Ed Catmull, Random House (April 8, 2014)

Tells the story of Pixar and explains how the social fabric of this organization evolved over time; includes lessons and inspiration for different ways of working.

Encouraging Smart Risks in the Workplace

By Alisson Keitner, Modern Workforce by Everwise (March 17, 2016)

Includes practical tips to encourage smart risk taking, as well as a primer on how this improves performance.

Engineering the Kiva Connection and Building a Creative Culture

Kiva.org (January 15, 2015)

Describes what it's like to be a software engineer at Kiva; includes specific elements of the organization's culture.

Innovation at BRAC

BRAC

Provides detailed background on innovation at BRAC, the world's largest NGO.

The Science Behind Your Ideal Work Environment

By Belle Beth Cooper, *Fast Company* (February 24, 2014)

Explains how to change a workspace to increase productivity as the scientific evidence behind some suggestions (e.g., why 77 degrees Fahrenheit is the optimal temperature); includes links to specific tools.

Workspaces That Move People

By Ben Waber, Jennifer Magnolfi, and Greg Lindsay, *Harvard Business Review* (October 2014)

Shares evidence that changing the workplace can improve efficiency as well as practical steps; includes stories illustrating benefits.

Appendix

The Bridgespan Group

Supported by
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Worksheet: Planning for action

Use the worksheet below to get organized and get moving on strengthening your organization's innovation capacity.

Directions:

- Assemble the people in your organization whose support would be needed to launch new capacity-building initiatives.
- As a group, select two to five initiatives you will undertake.
- For each initiative, write down who will lead it, what resources will be set aside for them, the timeline you have in mind, and the immediate next steps the person leading the initiative will take.

Initiative	Lead (unit or person)	Resources required	Timeline	Next steps
• *E.g., design physical spaces to foster chance encounters and informal interaction*	• *E.g., Jane Smith, COO*	• *E.g., Funds: ~$250K* • *E.g., other: 1 FTE of support*	• *E.g., 36 months, starting in June*	• *E.g., Jane to prepare full project plan and budget*
•	•	•	•	•
•	•	•	•	•
•	•	•	•	•
•	•	•	•	•
•	•	•	•	•

Library of Ideas for Action

Below are all of the ideas for action described in this guide, organized by the element of innovation capacity they support most directly.

Some of the ideas are relevant for multiple elements of innovation capacity. These are indicated as well, in light grey checkmarks.

Ideas for Action	Relevant Elements						Resources Required			Page #
	Catalytic Leadership	Curious Culture	Diverse Teams	Idea Pathways	Porous Boundaries	Ready Resources	Money	Expertise	Time	
Catalytic Leadership										
Develop a vision and strategy for innovation in your organization	✓					✓	Low	Low	Med	9
Reflect on your role, responsibilities, behavior, and priorities as a leader	✓	✓					Low	Low	Low	10-11
Diverse Teams										
Systematically recruit and retain a diverse workforce		✓	✓				Hi	Med	Hi	16
Create fellowship, internship, and volunteer programs			✓		✓		Med	Med	Med	17
Design innovation teams to be diverse along key dimensions	✓	✓	✓				Low	Med	Low	18
Train and support managers and staff to value diversity and inclusion	✓	✓	✓				Low	Hi	Med	19
Idea Pathways										
Map out idea pathways for your organization	✓	✓		✓	✓	✓	Med	Med	Med	24-25
Porous Boundaries										
Listen to and learn from those you serve	✓	✓		✓	✓		Varies			32
Co-create solutions alongside those you serve		✓	✓	✓	✓		Med	Med	Hi	33
Engage constituents so they have more input and ownership over your work	✓	✓	✓	✓	✓		Med	Low	Low	34
Convene diverse and creative groups		✓	✓	✓	✓		Med	Med	Med	35

Ideas for Action	Relevant Elements						Resources Required			Page #
	Catalytic Leadership	Curious Culture	Diverse Teams	Idea Pathways	Porous Boundaries	Ready Resources	Money	Expertise	Time	
Crowdsource ideas				✓	✓		Med	Low	Hi	36
Encourage the exchange and advancement of knowledge across the organization		✓			✓	✓	Hi	Med	Low	37
Ready Resources										
Determine the right strategy for funding your innovation efforts	✓					✓	Low	Med	Med	44
Decide how much of your budget you need to invest in innovation	✓					✓	Low	Low	Low	45
Choose who will receive innovation funding, and how	✓					✓	Low	Low	Low	46
Establish full-time innovation teams and roles	✓		✓			✓	Hi	Med	Hi	48
Distribute responsibilities and time allocations for innovation	✓		✓		✓	✓	Med	Med	Med	49
Make use of proven innovation tools and techniques		✓		✓		✓	Low	Low	Low	51
Curious Culture										
Debate ideas and assumptions	✓	✓					Low	Low	Low	57
Embrace failures and setbacks as learning opportunities	✓	✓					Med	Med	Med	58
Enable communication, collaboration, and transparency	✓	✓			✓		Low	Low	Med	59
Rethink your space		✓			✓		Med	Low	Med	60

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