Clinic: Developing an Organizational Theory of Change

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CompassPoint Nonprofit Services

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CompassPoint intensifies the impact of fellow nonprofit leaders, organizations, and networks as we achieve social justice together.

Welcome

- 9:30am – 4:30pm. 1 hour lunch around noon. A break in the morning and afternoon.

- Please sign in

- Silence mobile phones

- Wifi = CPGuest / Password = CPwelcome

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Introductions

- Organization name and purpose

- Name and role

- What brings you to today's clinic

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Learning Objectives

- Understand what a *theory of change* is and how it informs strategic decision-making in organizations

- Identify several approaches to a *theory of change* process, and understand the advantages and drawbacks to each

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Agenda

Today's Topics

- What is a theory of change?
- Trying on the elements
  - Core Values
  - Problem Statement
  - Anticipated Changes
  - Focus of Change
  - Organizational Strategies
- Reflection and action planning

Today's Rhythm

- Introducing concepts and sharing our experiences
- Individual reflection
- Team conversations and work time
- Full group reflections

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What is a Theory of Change?

A **conceptual linkage** among:

✓ an identified issue
or problem

✓ a set of desired changes

✓ among whom the
organization focuses its efforts

✓ specific strategies that contribute to that change

✓ the values that guide the organization's work

CompassPoint OUR THEORY OF CHANGE

VALUES

EQUITY: We pursue a just distribution of opportunities and resources.
RACIAL JUSTICE: We work to dismantle racial inequities and oppression at the interpersonal, organizational, and systemic levels.
MULTICULTURALISM: We value and engage the perspective and experience of diverse communities.
INTEGRITY: We hold ourselves accountable, claiming and learning from both successes and failures.
RELEVANCE: We design content and experiences that resonate with our clients.
LEARNING: We experiment, continuously questioning our assumptions and adapting.
PARTNERSHIP: We stand shoulder to shoulder with our clients, partners, and funders.
HUMOR: We laugh together to build connections and community that forward the work.

FOCUS

Leaders, organizations, and movement networks committed to social justice.

PROBLEM STATEMENT

Our fight for social justice is held back by systemic, structural, and interpersonal oppression.

STANCES

Leadership is a process, not a position.

A focus on strengths unlocks more powerful possibilities.

Leadership development and capacity building efforts must include a power and privilege analysis.

Change doesn't take root without attending to skills, systems, and culture in concert.

Impact and financial health are intrinsically linked.

STRATEGIES

We create exceptional and transformational learning experiences.

We approach leadership, management, and strategy holistically.

We use a mix of facilitation, teaching, coaching, peer learning, consulting, physical practice, and design thinking.

We continuously evolve our content based on our own experiences, our work with clients, and research in the field.

We form project teams that bring together different strengths and perspectives.

We nurture partnerships that complement our expertise and deepen our relevance and understanding.

We use our national platform to research and highlight emerging practices.

ANTICIPATED CHANGES

A powerful and resilient critical mass of diverse leaders at all levels.

Organizations are strong and adaptive.

Movement leaders are in strong relationship and build aligned strategies.

Leaders, organizations, and movements embrace practices of reflection and well-being for long-term sustainability.

SOCIAL JUSTICE

The dismantling of systems, structures, and practices that perpetuate oppression.
The deep and true valuing of marginalized communities, bringing our experiences and lives from the margins to the center.

Getting Grounded: Core Values

Values Defined: *Fundamental, intrinsic beliefs that guide an organization's work*

Guiding Principles Defined: *How the organization expresses its values; the organization's character in action. Phrases that describe the way the values manifest on a daily basis.*

Exercise: Values Storytelling

Think about a time when you felt deeply engaged in your organization's work.

- What values were being expressed in this moment?

- What is distinctive about how this value lives within your organization?

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Current Context: Naming the Problem

Problem Statement Defined:
A concise and compelling description of the conditions we aim to change.

- What is the underlying problem we aim to resolve?

- What motivates us to do this work?

- What's our most current understanding of the social issue we aim to address?

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Intended Impact: What Will Change?

> **Anticipated Changes Defined:**
> *Specific, observable changes that indicate the problem is being resolved*

- What will look, feel, sound different in the community, field, or movement if we are successful at resolving this problem?

- What are we holding ourselves accountable to in this work? How will we know we're successful?

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Our Contribution: Focus of Change

> **Focus of Change Defined:**
> *The people among whom we will focus our efforts and resources*

- Where do we leverage our organizational efforts to contribute toward these changes?

- How does this focus take advantage of our specific strengths and positioning as an organization?

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Our Contribution: Organizational Strategies

Organizational Strategies Defined:
*The distinctive, cross-cutting approaches we take to our work*

- When you look across your programs, what distinguishes your approach from other organizations with a similar mission?

- Do you have a particular methodology that cuts across two or more programs and is essential to your impact?

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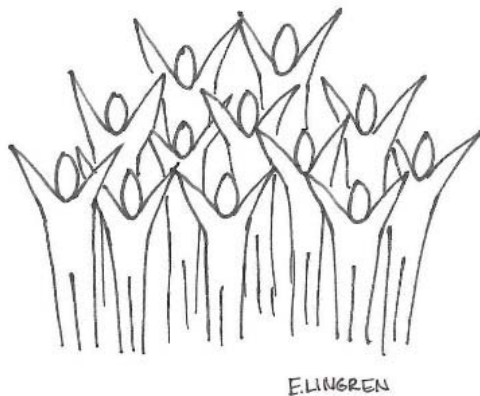
Living into a Theory of Change

Setting Priorities
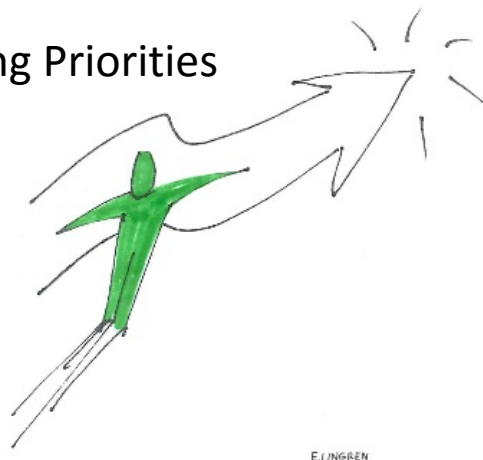
Developing Systems
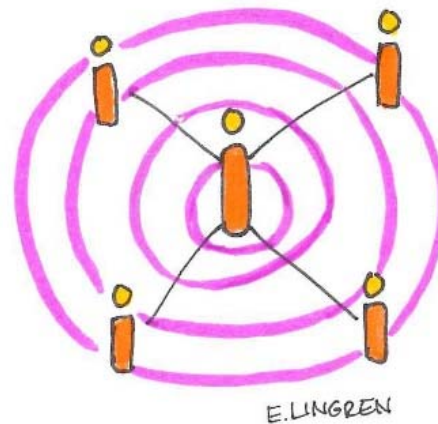
Developing Talent

Making Decisions

ACTION

Reflection and Action Planning

What next steps will you take based on today's session?

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Wrap up & Evaluation

- Resources will be emailed after workshop
- Email us with follow-up questions –
  shannone@compasspoint.org
  jeanneb@compasspoint.org
- Evaluation
- Thank you!

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