Thank you for joining us. We’ll be starting shortly.
I’m your host....

Erin Morant
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Center for the Advancement of Social Entrepreneurship (CASE)
Erin.Morant@duke.edu
www.CASEatDuke.org
I’m your host....

Robyn Fehrman
Managing Director
Center for the Advancement of Social Entrepreneurship (CASE)
www.CASEatDuke.org
Objectives

• Participants will understand the F. M. Kirby Impact Prize basics

• Participants will understand how the Kirby Impact Prize selection committee will evaluate their impact to-date

• Participants will increase understanding of the basics of impact evidence measurement

• Participants will learn what CASE resources are available to learn more about impact evidence
CASE Vision:
All social entrepreneurs have the skills, networks, and funding needed to scale their impact and solve the world’s most pressing challenges.

CASE Mission:
CASE prepares leaders and organizations with the business skills needed to achieve lasting social change.

EDUCATION
Train next generation social impact leaders

THOUGHT LEADERSHIP
Apply a research lens to the field of social entrepreneurship.

PRACTITIONER ENGAGEMENT
Build strong strategic networks & develop tools to accelerate the pace of change
Kirby Impact Prize Basics
What is the F. M. Kirby Impact Prize?

- A **new** global prize to amplify and accelerate impact-driven enterprises
- $100,000 (USD) in unrestricted funds

What makes this award unique:
- Scaling Focus
- Institutional & Brand Support
- Open to Nonprofit & For-Profit Models
- Unrestricted Funding
Who is eligible to apply?

The F. M. Kirby Impact Prize is open to all impact enterprises, operating anywhere in the world, that meet the following criteria:

1. Nonprofit, for-profit, or hybrid enterprise

2. Strong evidence of impact over the last 3 years and has a plan to scale that impact in the next 3-5 years

3. Has exemplary leadership that aligns with the core values of Fred Morgan Kirby: integrity, resourcefulness, resilience, meaningful collaboration, and diversity
Who is eligible to apply?

4. Robust anti-discrimination or inclusivity policy that prohibits discrimination on the basis of marginalized identities

**Resources to help get started:**

- [https://tinyurl.com/sampleantidiscrimination](https://tinyurl.com/sampleantidiscrimination)
- [https://tinyurl.com/nonprofitinclusiveness](https://tinyurl.com/nonprofitinclusiveness)
- [https://tinyurl.com/biasimpactassessment](https://tinyurl.com/biasimpactassessment)
How will the winner be selected?

- **Application Phase**
  - Deadline: September 30

- **Application Review**
  - October

- **Semi-Finalist Notified**
  - November 2- November 5

- **Due Diligence**
  - October

- **Semi-Finalist Interviews**
  - November 10-November 24

- **Winner Notified**
  - Week of December 21st
How will we evaluate your impact to date?

• **PROBLEM: What is the problem you’re working to solve?**
  • The enterprise shows a clear and well researched understanding of the issue they are addressing and the root causes therein

• **SOLUTION: What is your vision for solving the problem? What is your specific solution?**
  • The enterprise articulates the future state they are working to create and described how their solution will uniquely contribute to their vision. The enterprise understands the assumptions and risks for the model

• **EVIDENCE: What impact has your solution had to-date? How do you know?**
  • The enterprise has compelling evidence of impact, for at least 3 years, that their solution is having the intended impact and that their solution is the *best* solution compared to other available solutions.
How will we evaluate your impact to date?

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<thead>
<tr>
<th></th>
<th>VERY WEAK</th>
<th>WEAK</th>
<th>ADEQUATE</th>
<th>STRONG</th>
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<tbody>
<tr>
<td>1</td>
<td>NO EVIDENCE</td>
<td>MINIMAL EVIDENCE</td>
<td>EVIDENCE WITH LITTLE SUPPORTING INFORMATION</td>
<td>CLEAR AND CONCISE EVIDENCE</td>
<td>CLEAR, CONCISE, AND COMPELLING EVIDENCE</td>
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The Living Goods Story
Scaling to Improve the Health and Wealth of 50 Million People by 2025

Quick Facts
- **NAME**: Living Goods
- **FOUNDED**: 2007
- **IMPACT AREAS**: Health, Livelihoods
- **LEGAL STRUCTURE**: Nonprofit
- **2017 REVENUE**: USD$22 million
- **WEBSITE**: livinggoods.org
- **HQ**: Nairobi, Kenya
- **REGIONS SERVED**: Africa, Asia

Problem
- Millions of children and adults needlessly die each year from diseases that are treatable for less than USD$52. In the poorest countries, health systems are chronically under-funded, under-stocked, and under-managed.

Solution
- Living Goods bolsters community health outcomes by harnessing the power of technology to transform women and men into high-impact community health workers (CHWs). Working with country governments, Living Goods helps CHWs reach their full potential by providing them with a suite of tools, training, performance-based pay, and reliable access to needed medicines.

Impact
- A major study in Uganda showed the Living Goods approach costing less than $2 per person each year, and reducing under-5 child mortality by 27%. By end of 2018 it was supporting 9,000 CHWs across Uganda and Kenya, serving a swath of over 7 million people.

Audacious Goal
- Living Goods aims to transform the way health care is delivered for generations to come, ensuring that every mother and child has access to quality health care where they live. Specifically, Living Goods aims to deploy more than 30,000 CHWs to reach 25 million people by 2021 by growing its direct operations and by strengthening and expanding the community health networks of governments and other partners.

Scaling Snapshot: The Living Goods Story
The Problem
Problem: What is it?

• How well do you understand the problem that you are trying to solve?

• What are the root causes of this problem?

• How have you engaged your beneficiaries to deepen your understanding of the problem?

Numbers: Millions of children and adults needlessly die each year from diseases that are treatable for less than USD$2. In the poorest countries, health systems are chronically under-funded, under-stocked, and under-managed.
# Problem: Evaluation Rubric

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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</tr>
</tbody>
</table>

No evidence that the enterprise has a well-researched understanding of the issue they are addressing and the root causes therein

Minimal evidence that the enterprise has a well-researched understanding of the issue they are addressing and the root causes therein

Evidence that the enterprise has a well-researched understanding of the issue they are addressing and the root causes therein

Clear and concise evidence that the enterprise has a well-researched understanding of the issue they are addressing and the root causes therein

Clear, concise, and compelling evidence that the enterprise has a well-researched understanding of the issue they are addressing and the root causes therein
Your Solution
Solution: What is your vision? How are you solving the problem?

- What is the future state that you are working to create?
- What makes your solution unique?
- What are the assumptions and risks in your model?
## Solution: Evaluation Rubric

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>Articulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>VERY WEAK</td>
<td>No Evidence</td>
</tr>
<tr>
<td>2</td>
<td>WEAK</td>
<td>Minimal Evidence</td>
</tr>
<tr>
<td>3</td>
<td>ADEQUATE</td>
<td>Evidence with little supporting information</td>
</tr>
<tr>
<td>4</td>
<td>STRONG</td>
<td>Clear and concise evidence</td>
</tr>
<tr>
<td>5</td>
<td>EXEMPLARY</td>
<td>Clear, concise, and compelling evidence</td>
</tr>
</tbody>
</table>

### No Articulation:
Enterprise does not articulate how their solution will uniquely contribute to their vision and there is no evidence that they understand the assumptions and risks for their model.

### Vague or Incomplete Articulation:
Enterprise vaguely articulates the future state they are working to create and there is minimal evidence that the enterprise understands its outputs, outcomes, or the assumptions and risks for their model.

### Beginner Articulation:
Enterprise articulates the future state they are working to create and has some ideas about a theory of change, and maybe some outputs, but doesn’t link them to outcomes, assumptions to test, or risks, in a convincing way.

### Intermediate Articulation:
Enterprise clearly and concisely articulates the future state they are working to create, with a theory of change that articulates key activities, key outputs and outcomes and some attention to assumptions and risks.

### Advanced Articulation:
Enterprise clearly and concisely articulates the future state they are working to create, with a theory of change that articulates key activities, key outputs and key outcomes. In addition, they display a sophisticated knowledge about testing the assumptions and risks in their model.
Evidence of Impact
**Impact**: What impact have you had? How do you know? What do stakeholders say?

- What evidence do you have that your solution is creating the impact you intended? How rigorous is that evidence?

- What longitudinal data do you have that shows a relative change compared to where it started?

- What do you have in place to ensure consistent replication & positive impact?

- What practices or procedures do you have to engage stakeholders in gathering & sharing impact evidence?

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A major study in Uganda showed the Living Goods approach costing less than $2 per person each year, and reducing under-5 child mortality by 27%. By end of 2018 it was supporting 9,000 CHWs across Uganda and Kenya, serving a swath of over 7 million people.
## Impact: Evaluation Rubric

<table>
<thead>
<tr>
<th>Level 1:</th>
<th>Level 2:</th>
<th>Level 3:</th>
<th>Level 4:</th>
<th>Level 5:</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is little or no evidence, anecdotal or otherwise, that the intervention creates the impact intended</td>
<td>Statements about impact are primarily anecdotal or based on belief</td>
<td>Enterprise is capturing data that shows positive change for its activities mostly through output data</td>
<td>Enterprise has internal longitudinal data that shows relative change compared to when it started. It may not be able to demonstrate causality but has a strong base for eventually doing so. It has started to create internal systems for regular feedback</td>
<td>Enterprise has internal longitudinal data that shows relative change compared to when it started. Enterprise has sophisticated internal systems, which engages key stakeholders in deciding what evidence is collected and how it is shared and has practices that include regular feedback loops. It may not be able to demonstrate causality but has a strong base for eventually doing so</td>
</tr>
</tbody>
</table>
Impact Evidence Basics
4 Basics of Impact Evidence

- Mission Statement
- Impact Story
- Theory of Change
- KPIs
Mission Statement

1. Mission Statement

- Captures the impact you want to create
- 3 essential elements:
  verb $\rightarrow$ target population
Impact Story

2. Impact Story

- Longer version of your Mission Statement
- *Special sauce* of your solution
- 30 seconds or less
Theory of Change

3. Theory of Change

- Theory of how activities lead to impacts
- Includes assumptions
- If, then statement
Theory of Change

- **Inputs**: What you need to do your work
- **Activities**: The things you do to produce value
- **Outputs**: The quantifiable results of your activities
- **Outcomes**: The larger changes you are working to make
- **Impact**: The Change that is attributable to your work

**Money**, **People**, **Equipment**, **Expertise**, **Relationships**

**Produce, Distribute, Install, Train**

**Key Performance Indicators**

**Increase / Decrease**

**So what? How is the world different because of your work?**

*CASE Smart Impact Capital: The 4 Impact Basics*
Outputs & Key Performance Indicators

4. Key Performance Indicators (KPIs)

- Data on outputs related to desired social outcomes
- KPIs will likely change over time
- One or more KPI should focus on breadth of reach
### Outcomes & Impact

<table>
<thead>
<tr>
<th>TYPE</th>
<th>EXAMPLE OUTCOMES</th>
<th>EXAMPLE IMPACT EVIDENCE MEASURES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Impacts on the environment</strong></td>
<td>● Environmental policy decisions have been influenced by research evidence.</td>
<td>● Verifiable influence on particular projects or processes which bring environmental benefits.</td>
</tr>
<tr>
<td></td>
<td>● The management or conservation of natural resources has changed.</td>
<td>● Traceable reference to the influence of research in planning decision outcomes.</td>
</tr>
<tr>
<td></td>
<td>● The management of an environmental risk or hazard has changed.</td>
<td></td>
</tr>
<tr>
<td><strong>Impacts on health and welfare</strong></td>
<td>● Outcomes for patients or related groups have improved.</td>
<td>● Measures of improved clinical outcomes behavior, or health services.</td>
</tr>
<tr>
<td></td>
<td>● Public health and well-being has improved.</td>
<td>● Evidence of increased awareness of health risks and benefits</td>
</tr>
<tr>
<td></td>
<td>● Care and educational practices have changed.</td>
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</tbody>
</table>

*Source: The University of Glasgow*
### Outcomes & Impact

<table>
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<th>TYPE</th>
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<th>EXAMPLE IMPACT EVIDENCE MEASURES</th>
</tr>
</thead>
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<tr>
<td><strong>Impacts on public policy and services</strong></td>
<td>• Policy debate has been stimulated or moved forward by research evidence.</td>
<td>• Documented evidence of policy debate</td>
</tr>
<tr>
<td></td>
<td>• Changes to policy decisions, legislation, or guidelines have been informed by research evidence.</td>
<td>• Documented evidence of changes to public policy, legislation, regulations, or guidelines.</td>
</tr>
<tr>
<td></td>
<td>• Implementation of a policy or the delivery of a public service has changed.</td>
<td>• Measures of improved public services.</td>
</tr>
<tr>
<td><strong>Impacts on society, culture, and creativity</strong></td>
<td>• Public understanding has improved.</td>
<td>• Documented evidence that public understanding has been enhanced.</td>
</tr>
<tr>
<td></td>
<td>• Changes to social policy have been informed by research</td>
<td>• Critical reviews in the media.</td>
</tr>
<tr>
<td></td>
<td>• Changes to social policy led to improved social welfare, equality, or social inclusion.</td>
<td>• Measures of improved social equality, welfare or inclusion.</td>
</tr>
</tbody>
</table>

*Source: The University of Glasgow*
Different Investors Require Different Levels of Impact Evidence Rigor
Sample Tools for Measuring Impact Evidence

Evaluation Tool #1
Monitoring Organizational Reach and Influence
Organization Reach and Influence Table Template

Evaluation Tool #2
Measuring Household Out-of-Pocket Health Expenditure

Evaluation Tool #3
Economic Impact: Finding the right analysis for your evaluation needs
Cost Consequence Analysis Template

Evaluation Tool #4
Strengthening Access and Quality of Care Patient Data

Evaluation Tool #5
Considerations in Leveraging Data for Expansion

Evidence Lab at Duke Global Health Institute
What’s Next?
What can I do if I have more questions?

• Register for and attend Information Sessions:

<table>
<thead>
<tr>
<th>Title</th>
<th>Date and Time</th>
<th>Objective</th>
<th>Link to Register</th>
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<tbody>
<tr>
<td>F. M. Kirby and Leadership</td>
<td>Tues. September 22nd 6-6:30pm</td>
<td>In this session, we will discuss the four aspects of discussing your enterprise and its leadership: strong values and stakeholder accountability, resourcefulness and resilience, strategic collaboration, and team diversification</td>
<td><a href="https://tinyurl.com/fmkirbyleadership">https://tinyurl.com/fmkirbyleadership</a></td>
</tr>
</tbody>
</table>

• Recordings and slide decks from previous information sessions are available on the F. M. Kirby Impact Prize webpage: https://bit.ly/kirbyimpactprize

• Submit your questions about the F. M. Kirby Impact Prize: https://tinyurl.com/KirbyImpactQuestions

• Review the Frequently Asked Questions Tool: https://tinyurl.com/KirbyImpactFAQS
### Problem, Solution, Impact

<table>
<thead>
<tr>
<th>Resource</th>
<th>URL</th>
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<tr>
<td>Evidence Lab at Duke Global Health Institute: Evaluation Toolkit</td>
<td><a href="https://sites.globalhealth.duke.edu/evidencelab/resources/tools/">https://sites.globalhealth.duke.edu/evidencelab/resources/tools/</a></td>
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