



CASE

F. M. Kirby Impact Prize

How to Talk About Your Scaling Plan

Thank you for joining us. We'll be starting shortly.

Objectives

- Participants will understand the F. M. Kirby Impact Prize basics
- Participants will understand the rubric continuum
- Participants will understand how to discuss their scaling goal and strategy
- Participants will learn what CASE resources are available to learn more about scaling strategies

I'm your host....



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I'm your host....



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About CASE

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

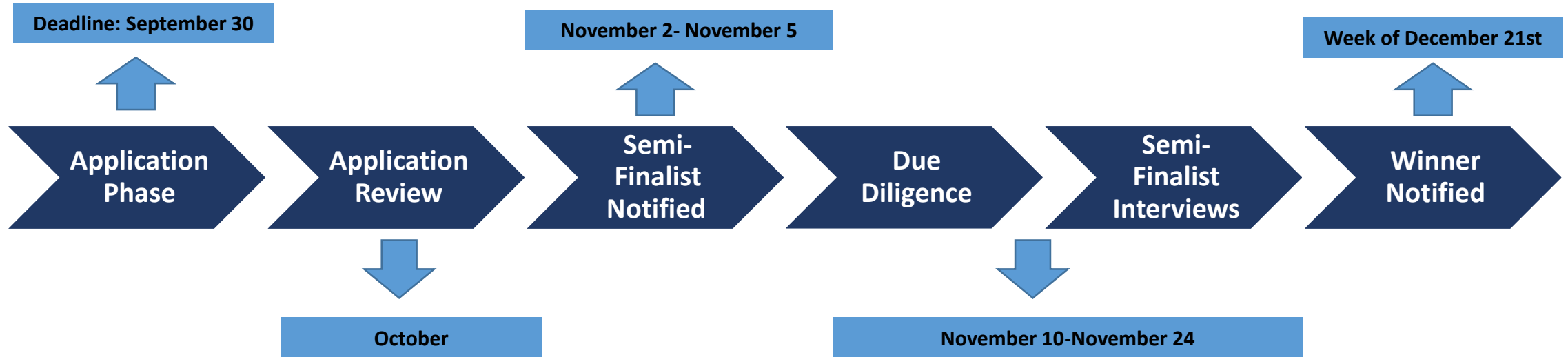
Who is eligible to apply?

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/nonprofitinclusiveness>
- <https://tinyurl.com/biasimpactassessment>

How will the winner be selected?



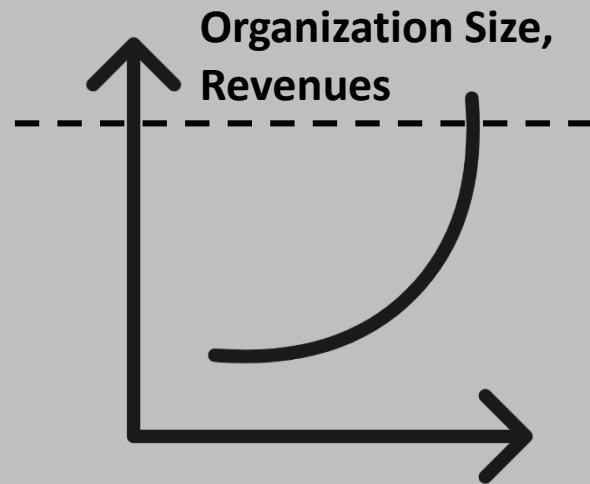
Talking About Your Scaling Plan

What do we mean by “scale”?

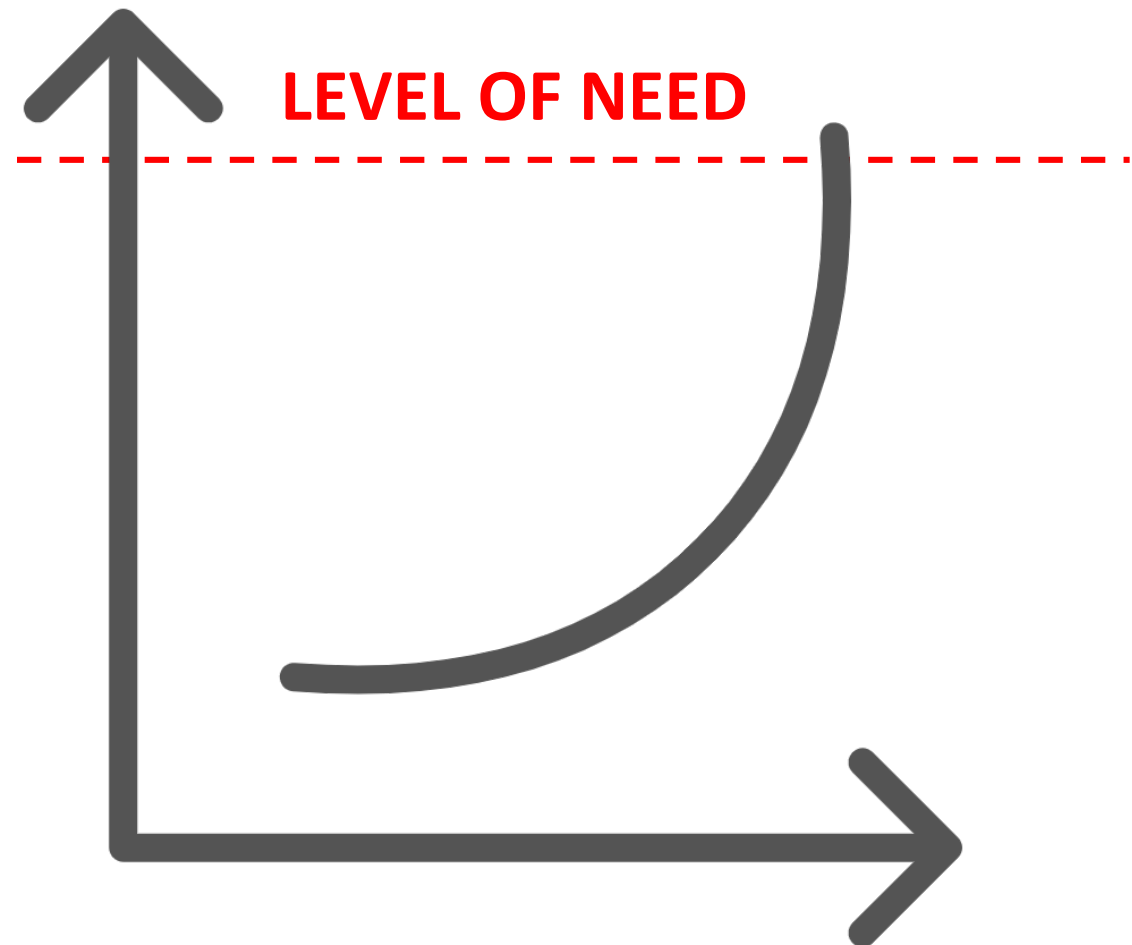
“We have learned to create the small exceptions that can change the lives of hundreds. But we have not learned how to make the exceptions to the rule to change the lives of millions.”

Scale = expanding impact to meet the level of need

Not just about the organization...



...but about the IMPACT on the problem.



How will we evaluate your readiness to scale your impact?

- **SCALING STRATEGY:**
 - The enterprise has articulated their strategy for scaling their impact over the next 3-5 years and what goals they hope to achieve
- **FINANCIAL VIABILITY:**
 - The enterprise understands costs, is clear on who payers should be in the short and long term, and has a funding pipeline aligned with the scaling plan
- **ECOSYSTEM:**
 - The enterprise has mapped the ecosystem and understands how their solution plays with existing forces and how the existing players will either accelerate impact or present barriers
- **TEAM:**
 - The enterprise understands what team their scaling plan requires and has analyzed current gaps in capacities needed
- **INTERNAL SYSTEMS:**
 - The enterprise understands what internal systems and structures their scaling plan requires

How will we evaluate your readiness to scale your impact?

1 VERY WEAK <i>NO EVIDENCE</i>	2 WEAK <i>MINIMAL EVIDENCE</i>	3 ADEQUATE <i>EVIDENCE WITH LITTLE SUPPORTING INFORMATION</i>	4 STRONG <i>CLEAR AND CONCISE EVIDENCE</i>	5 EXCEPTIONAL <i>CLEAR, CONCISE, AND COMPELLING EVIDENCE</i>
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Scaling Strategy

Scaling Strategy. What is your goal?

- What is the problem you're working to solve?
- What is your solution?
- What impact has your solution had to-date?
- What is your goal for the next X years?

The Living Goods Story

Scaling to Improve the Health and Wealth of 50 Million People by 2025



ScalingSNAPSHOT

March 2019



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\$2. 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 Strategy: How will you get there?

- Strategies fall on a DIRECT < -- > INDIRECT continuum
- DIRECT: Geographic Expansion, Affiliation, Franchising
- INDIRECT: Dissemination, Technical Assistance, Influence, Advocacy



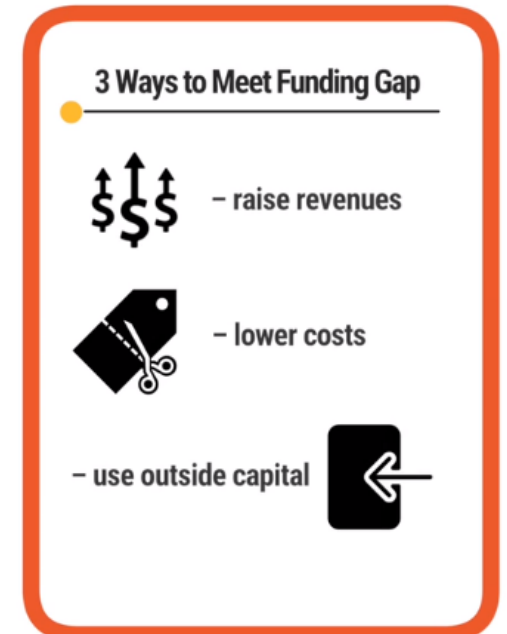
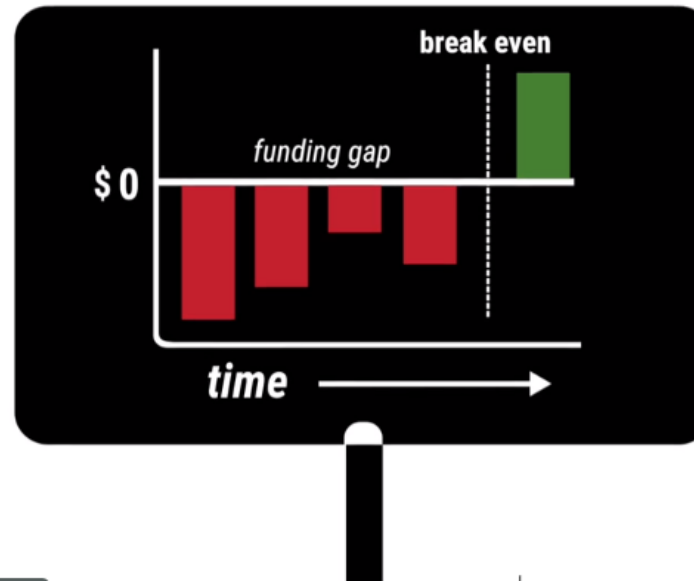
Scaling Strategy. Evaluation Rubric

1 VERY WEAK <i>NO EVIDENCE</i>	2 WEAK <i>MINIMAL EVIDENCE</i>	3 ADEQUATE <i>EVIDENCE WITH LITTLE SUPPORTING INFORMATION</i>	4 STRONG <i>CLEAR AND CONCISE EVIDENCE</i>	5 EXCEPTIONAL <i>CLEAR, CONCISE, AND COMPELLING EVIDENCE</i>
The enterprise does not articulate their strategy for scaling their impact or what goals they hope to achieve.	The enterprise vaguely articulates their strategy for scaling their impact and what goals they hope to achieve.	The enterprise articulates their strategy for scaling their impact and what goals they hope to achieve.	The enterprise clearly and concisely articulates their strategy for scaling their current impact and what goals they hope to achieve.	The enterprise articulates a clear, concise, and compelling strategy for scaling their impact and what goals they hope to achieve. Additionally, the enterprise articulates the key performance indicators used to assess the effectiveness of the scaling strategy.

Financial Viability

Financial Viability: What financing does your scaling strategy require?

- What are the costs of your scaling strategy?
- Who will pay now? Later?
- What specific payers have you identified?
- If your strategy has a break-even point, when do you anticipate reaching it?
- What role does the Kirby Impact Prize play in your financing plan?



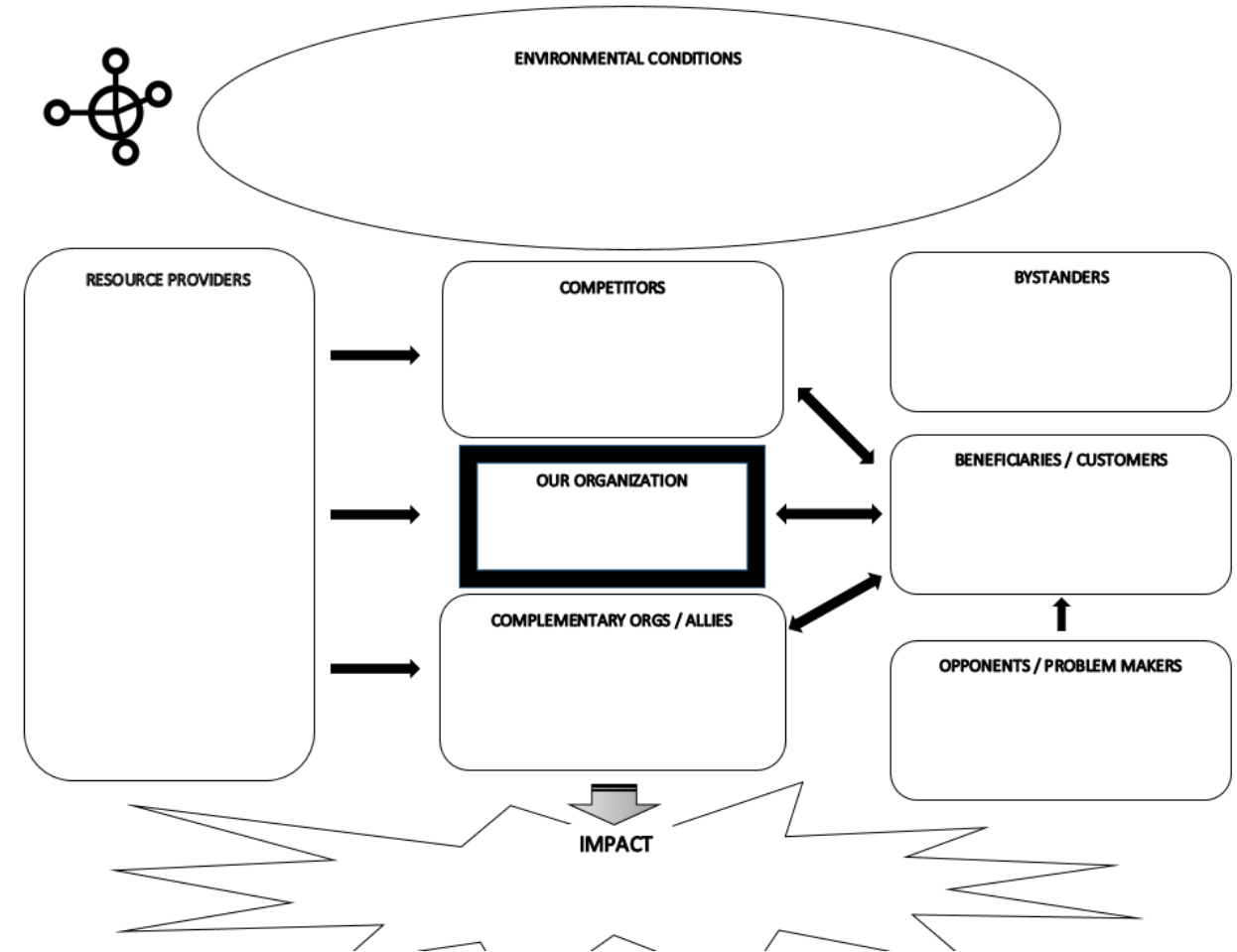
Financial Viability: Evaluation Rubric

<p>1 VERY WEAK</p> <p><i>NO EVIDENCE</i></p>	<p>2 WEAK</p> <p><i>MINIMAL EVIDENCE</i></p>	<p>3 ADEQUATE</p> <p><i>EVIDENCE WITH LITTLE SUPPORTING INFORMATION</i></p>	<p>4 STRONG</p> <p><i>CLEAR AND CONCISE EVIDENCE</i></p>	<p>5 EXCEPTIONAL</p> <p><i>CLEAR, CONCISE, AND COMPELLING EVIDENCE</i></p>
<p>Lack of funding constrains enterprise's current operations. No evidence that enterprise has thought about funding a scaling plan yet.</p> <p>No evidence that the enterprise has a plan for how to use the prize to scale impact over 3-5 years.</p>	<p>Enterprise has adequate funding to fuel current operations, but hasn't assessed what additional funding- beyond the Kirby Impact Prize- will be needed to pursue their scaling strategy.</p>	<p>Enterprise knows how much capital they need to secure to pursue their scaling strategy and has started to identify payers/funders that might be aligned with that scaling strategy.</p> <p>Strategy demonstrates how Kirby Impact Prize will be integrated with their funding streams.</p>	<p>Enterprise knows how much capital they need to secure to pursue their scaling strategy and has identified payers/funders that are aligned with that scaling strategy. In addition to having enough cash on hand to manage operations, enterprise has lines of credit or other ways to manage unpredicted downturns.</p> <p>Strategy indicates that Kirby Impact Prize will be catalytic in achieving greater impact.</p>	<p>Enterprise has sufficient funding streams to fuel both current operations and at least part of their scaling strategy. Enterprise has proof of our payers'/funders' willingness to pay and funding streams are aligned with their scaling strategy.</p> <p>Strategy indicates that Kirby Impact Prize will be transformational in achieving greater impact.</p>

Ecosystem

Ecosystem: How does your environment affect your scaling strategy?

- What conditions or players contribute to your success?
- Are these factors critical to maintain as you think about scale?
- What factors could undermine your success?
- Are there ecosystem changes that could magnify your impact?



Ecosystem: Evaluation Rubric

<p>1 VERY WEAK</p> <p><i>NO EVIDENCE</i></p>	<p>2 WEAK</p> <p><i>MINIMAL EVIDENCE</i></p>	<p>3 ADEQUATE</p> <p><i>EVIDENCE WITH LITTLE SUPPORTING INFORMATION</i></p>	<p>4 STRONG</p> <p><i>CLEAR AND CONCISE EVIDENCE</i></p>	<p>5 EXCEPTIONAL</p> <p><i>CLEAR, CONCISE, AND COMPELLING EVIDENCE</i></p>
<p>No evidence that enterprise has a broad understanding of the ecosystem contexts, or the key stakeholder groups that it influences or depends on.</p>	<p>Enterprise is aware of frictions within the ecosystem but does not understand where they stem from or how to address them.</p>	<p>Enterprise has named or mapped their stakeholders/ecosystem and understands the barriers and opportunities to further implementing their solution, but are still formulating strategies to mitigate or take advantage of these conditions.</p>	<p>Enterprise has mapped their stakeholders/ecosystem, understands the barriers and opportunities, and has developed strategies to mitigate or take advantage of those solutions.</p>	<p>Enterprise has mapped their ecosystem, understands the barriers and opportunities, has developed strategies to mitigate or take advantage of those solutions and there is evidence that these strategies have been successfully employed.</p>

Team

Team: What team does your scaling strategy require?

- What is the right mix of talent (board, staff, volunteers) for your scaling strategy?
- What are you doing to cultivate that mix?
- What people-related systems and structures do you need to evolve?
- How will you develop, incentivize, and retain the talent your strategy requires?

NOTABLE QUOTABLE

“Organizations tend not to think rigorously enough about talent. You think you know it, but you don’t; you often do things by feel rather than by a process of rigor. This can be OK in early stages, but as you’re growing you need to put in more discipline—and that usually happens too late.”

KEN HIMMELMAN
formerly of Health Leads

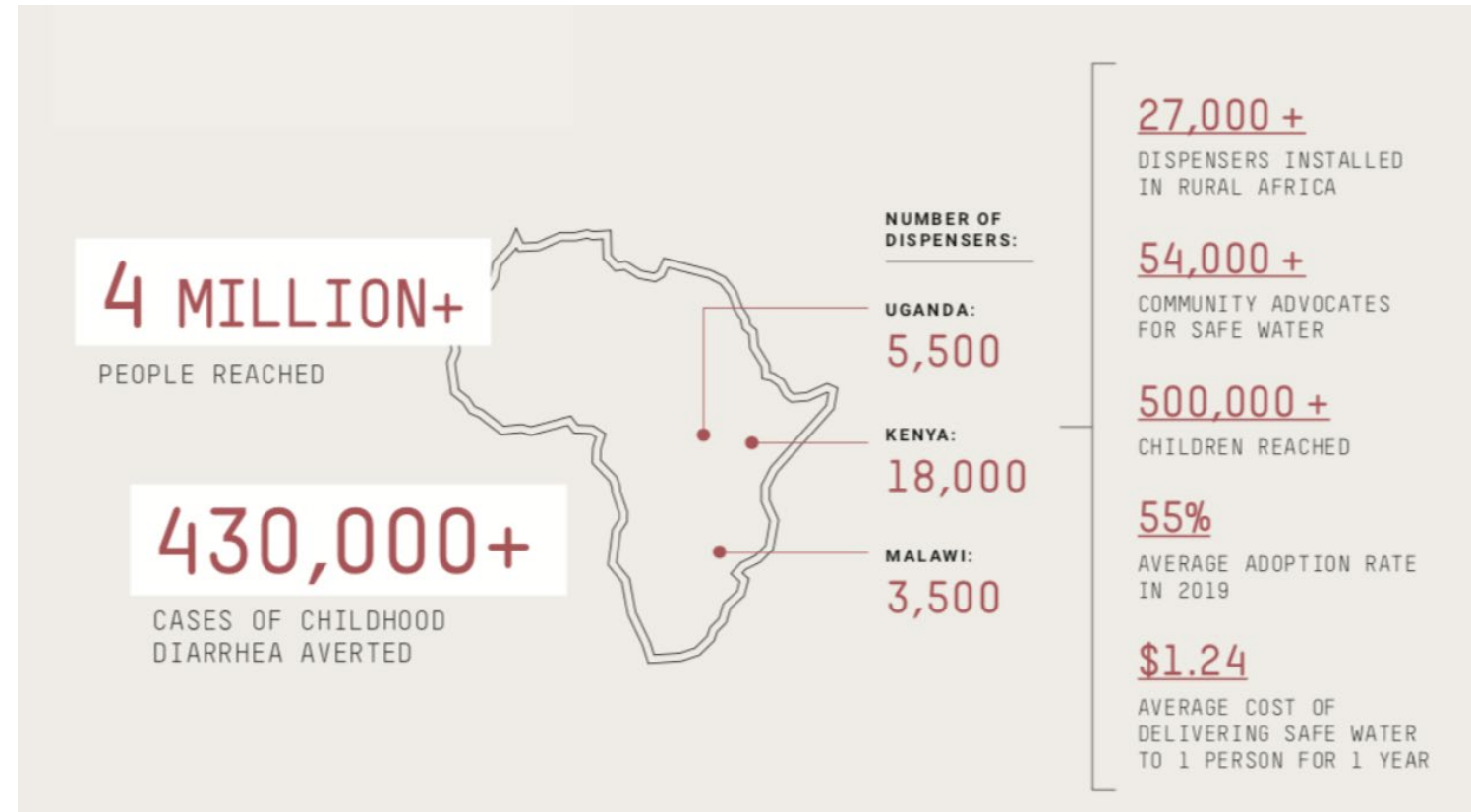
Team: Evaluation Rubric

<p>1 VERY WEAK</p> <p><i>NO EVIDENCE</i></p>	<p>2 WEAK</p> <p><i>MINIMAL EVIDENCE</i></p>	<p>3 ADEQUATE</p> <p><i>EVIDENCE WITH LITTLE SUPPORTING INFORMATION</i></p>	<p>4 STRONG</p> <p><i>CLEAR AND CONCISE EVIDENCE</i></p>	<p>5 EXCEPTIONAL</p> <p><i>CLEAR, CONCISE, AND COMPELLING EVIDENCE</i></p>
<p>No evidence that the enterprise understands what talent is needed to scale the solution.</p> <p>Enterprise does not have a clear organizational and governance structure.</p>	<p>Enterprise understands and articulates what talent is needed to scale the solution but does not have a plan in place to address the gaps in capacities needed to execute the scaling plan.</p>	<p>Enterprise understands current gaps in team capacity and is implementing a plan to address these gaps to execute the scaling plan.</p>	<p>Enterprise has an ongoing internal process to identify gaps in capacities and develop current and new talent to address these gaps.</p>	<p>Enterprise has a robust talent performance and development policy to cultivate the capacities needed to execute the scaling plan.</p>

Internal Systems

Internal Systems: How will you know you're making progress?

- What key performance indicators will you track as you implement your scaling strategy? Why?
- What systems will you use for tracking?
- How will you use this data in decision-making?



Internal Systems: Evaluation Rubric

<p>1 VERY WEAK</p> <p><i>NO EVIDENCE</i></p>	<p>2 WEAK</p> <p><i>MINIMAL EVIDENCE</i></p>	<p>3 ADEQUATE</p> <p><i>EVIDENCE WITH LITTLE SUPPORTING INFORMATION</i></p>	<p>4 STRONG</p> <p><i>CLEAR AND CONCISE EVIDENCE</i></p>	<p>5 EXCEPTIONAL</p> <p><i>CLEAR, CONCISE, AND COMPELLING EVIDENCE</i></p>
<p>The enterprise does not have internal systems in place to identify or track key performance indicators.</p>	<p>Enterprise has an informal internal system to track key performance indicators.</p>	<p>Enterprise has an internal system to track key performance indicators.</p>	<p>Enterprise has an internal system to track key performance indicators and clearly outlines how they are tracked overtime.</p>	<p>Enterprise has an internal system to track key performance indicators, clearly outlines how they are tracked overtime, and how this information is used to drive decision-making.</p>

What can I do if I have more questions?

- Register for and attend Information Sessions:

Title	Date and Time	Objective	Link to Register
How to Talk About Your Impact to Date	Fri. September 11 th 12-12:30pm	In this session, we will discuss the three aspects of discussing your impact: problem, solution, and evidence.	https://tinyurl.com/impactevidence
F. M. Kirby and Leadership	Tues. September 22 nd 6-6:30pm	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	https://tinyurl.com/fmkirbyleadership

- 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>

CASE Resources

Scaling Strategies:

CASE Smart Impact Capital: Articulating Your Impact to Investors	https://vimeo.com/181834167/ff474de205?_ga=2.174759714.1411103134.1598362173-370350613.1570113345
Scaling Social Impact: Strategies for Spreading Social Innovation	https://centers.fuqua.duke.edu/case/wp-content/uploads/sites/7/2015/02/Article_Dees_ScalingSocialImpact_20041.pdf
Pivoting to Impact: Navigating the Road to Scale	https://static.globalinnovationexchange.org/s3fs-public/asset/document/FINAL%20Scaling%20Pathways%20-%20Pivoting%20to%20Impact%20(5.11.17).pdf?FUAG78FHtelgEUrQzC26YVmcN8apeovu&_ga=2.240893571.1411103134.1598362173-370350613.1570113345
Scaling Pathways: Scaling Snapshots	https://centers.fuqua.duke.edu/case/knowledge-center/scaling-pathways/

Ecosystem:

Cultivate Your Ecosystem	https://centers.fuqua.duke.edu/case/knowledge_items/cultivate-your-ecosystem/
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CASE Resources

Financial Viability:

CASE Smart Impact Capital	https://casesmartimpact.com/capital/
Financing for Scaled Impact	https://static.globalinnovationexchange.org/s3fs-public/asset/document/Scaling%20Pathways_Financing%20for%20Scaled%20Impact_0.pdf?goHK759iyLqBu2JoQoGwbaoGOI9j5KIw&_ga=2.140680114.1411103134.1598362173-370350613.1570113345

Teams:

People Matter: Evolving Talent to Drive Impact at Scale	https://static.globalinnovationexchange.org/s3fs-public/asset/document/Scaling%20Pathways_%20People%20Matter--Evolving%20Talent%20to%20Drive%20Impact%20at%20Scale.pdf?c4JrwCZf6NnUsAjq6kjh6hj4UD7GG6ZW
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Internal Systems

Using Data to Power to Scale	https://centers.fuqua.duke.edu/case/wp-content/uploads/sites/7/2020/06/ScalingPathways_UsingDataToPowerScale_June23_2020_FINAL.pdf
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