A Pragmatic Playbook for Impact

Direct, Widespread, and Systemic
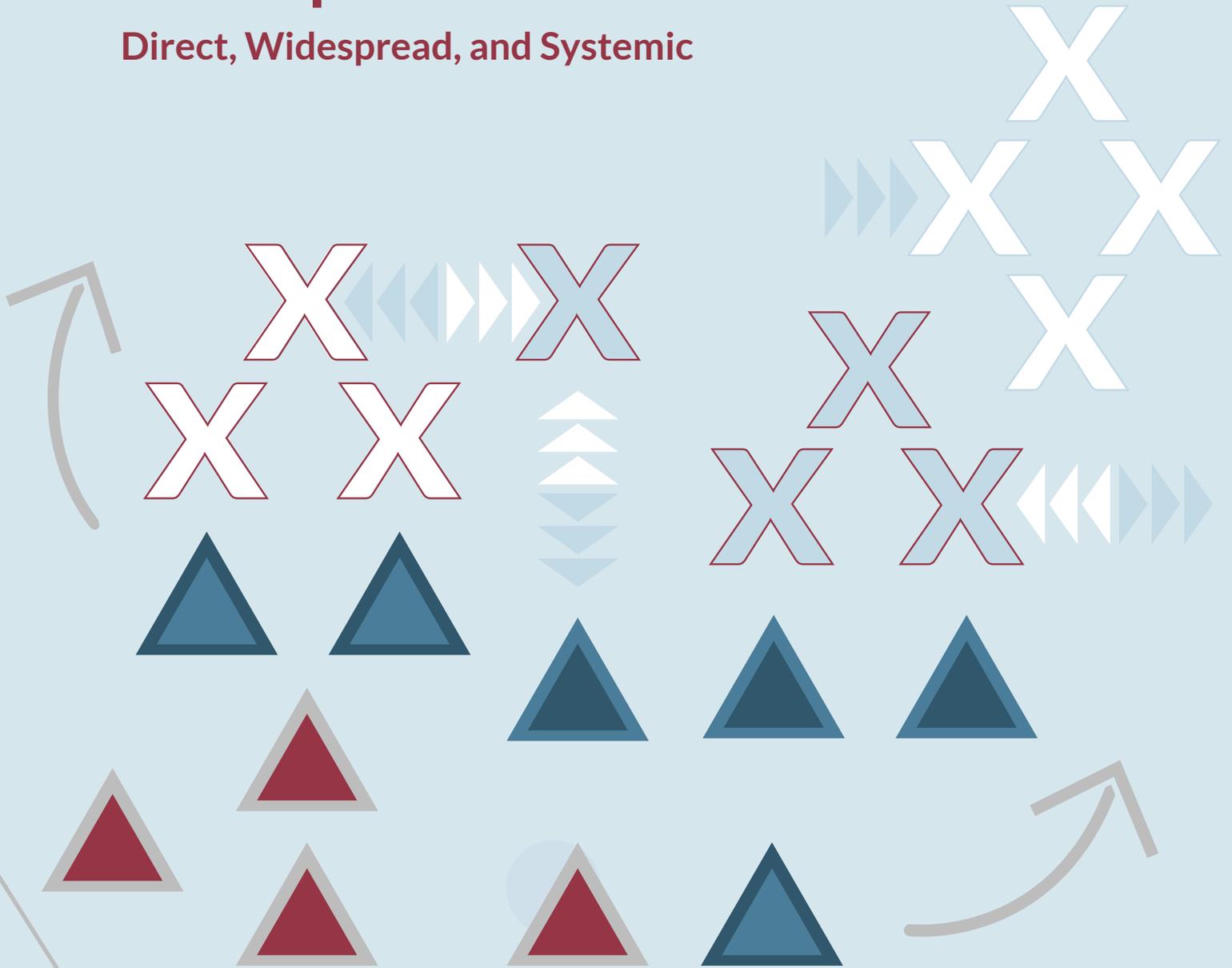
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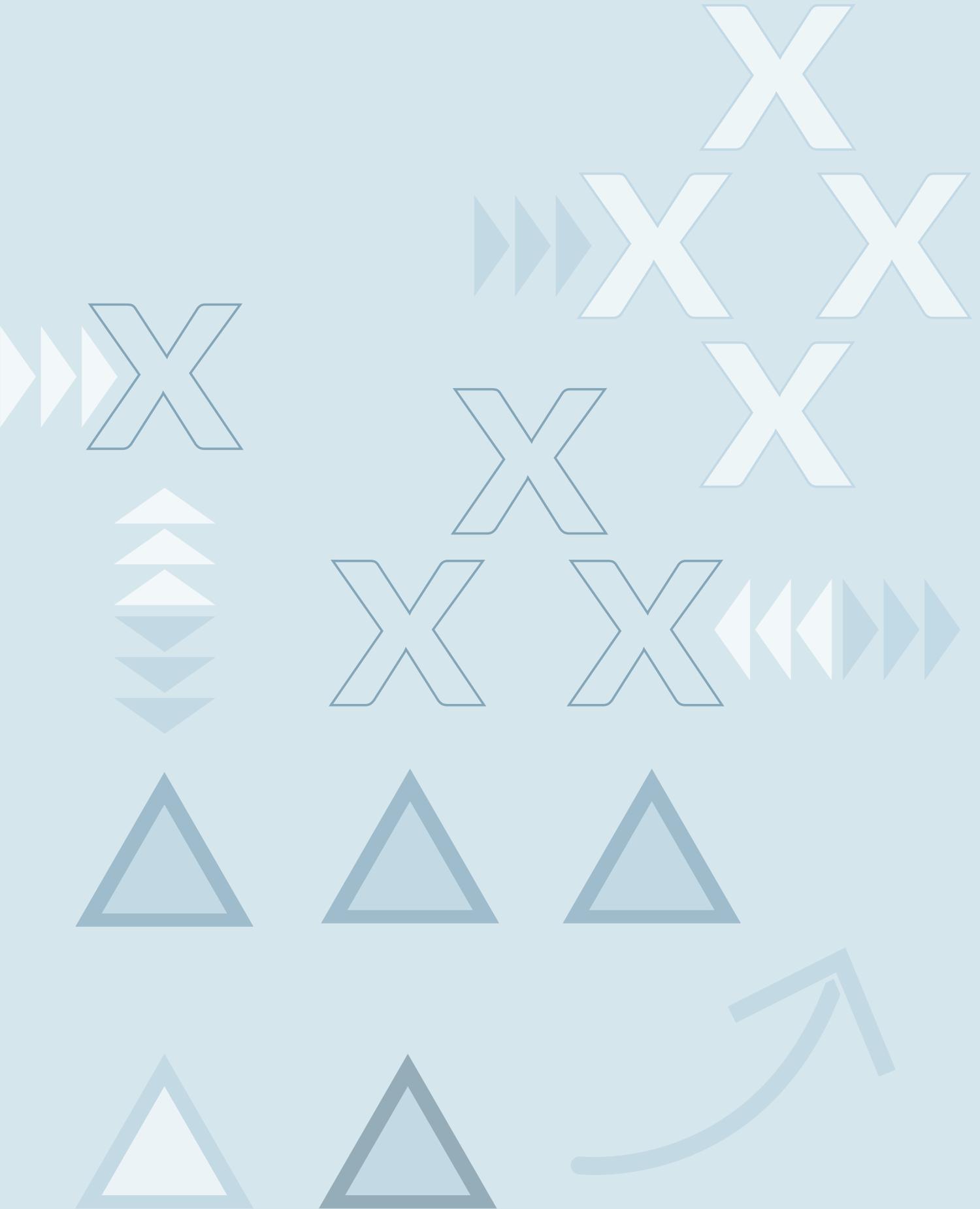
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Introduction

What Are the Three Strategies Social Entrepreneurs Can Use to Maximize Impact?

S ocial entrepreneurs don't lack ambition. Being a social entrepreneur requires an irrational belief in the power of one's work to transform a world in dire need of change. Just look at the scale and degree of change embodied in any social impact organization's vision and mission statements about the transformation it aspires to create for the communities it serves.

Nowhere is this truer than in education entrepreneurship. However, to make their ambitions a reality, to make the irrational actionable, and to move from a narrow theory of action to achieving a successful theory of population-level change, education entrepreneurs must consider working across three strategies for impact:

- **Direct Impact:** How an organization provides programming directly to its target beneficiaries.
- **Widespread Impact:** How an organization builds the capacity of partner organizations to replicate elements of its program model.
- **Systemic Impact:** How an organization shifts mindsets, relationships, and power to in turn shift the policies, practices, and resource flows that create stronger conditions for adoption of an organization's values, program model, and its ultimate vision for change.[1]

These strategies are not mutually exclusive but rather reinforcing and cyclical. While education entrepreneurs and their organizations frequently begin in Direct Impact, many successful ones expand to work across two or even all three impact strategies over time (Figure 1).

Why Should Education Entrepreneurs Focus on Broadening Their Impact Strategies Now?

The tragedy of COVID-19 exacerbated education inequities that existed before the pandemic and accelerated the need for more education entrepreneurs to grapple with expansion of their impact strategies.

Education entrepreneurs, school and district leaders, postsecondary institutions, philanthropists, and policymakers are all struggling to untie the Gordian knot of how to achieve an equitable education recovery in this moment and how to scale what works quickly. However, all face a set of common challenges:
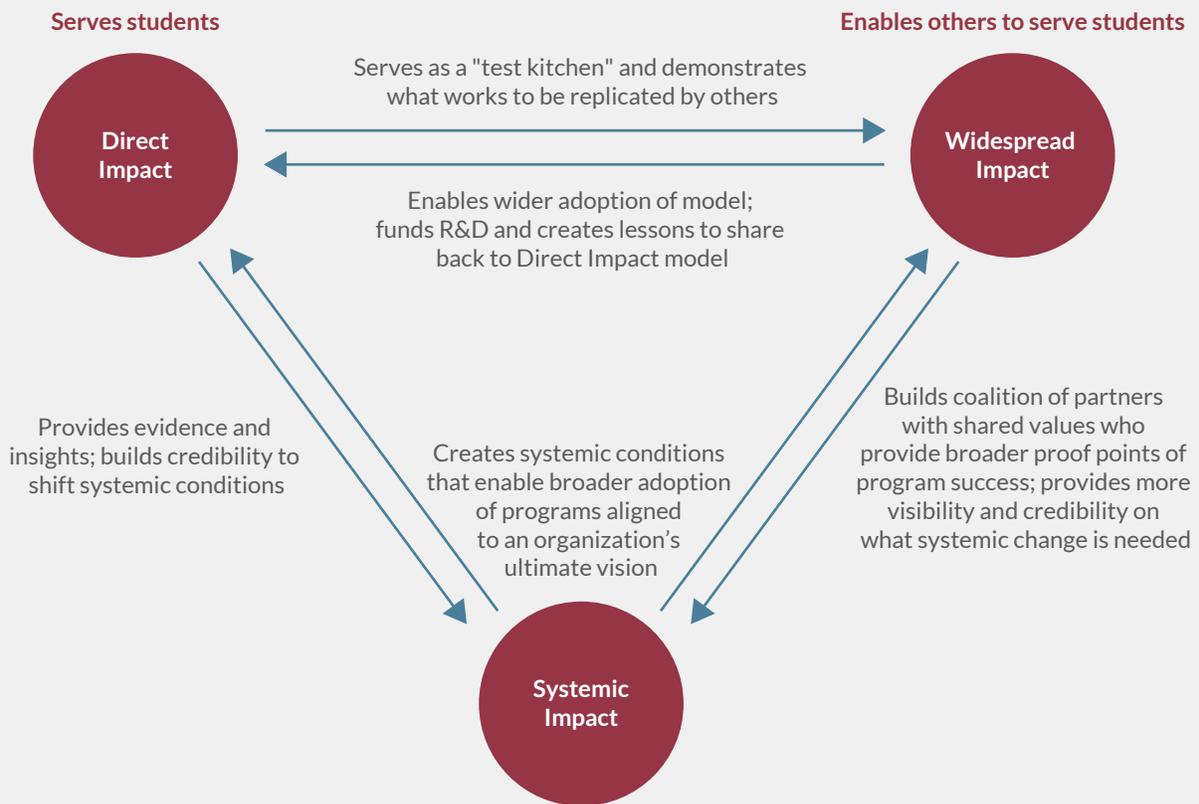
- Most evidence-based education programs are not positioned to scale their current Direct Impact strategies fast enough to meet the need of the school systems and communities overwhelmed and in need of support.

- Local, community-based organizations deeply understand the communities they serve, but many have neither the ability to access resources to build the evidence base of their own programming nor the ability to access the evidence-based resources of other organizations. Many also do not have a channel to share their own learnings and innovations to benefit other communities.

- There has been a surge in public COVID-19 relief funding, providing a once-in-a-generation opportunity to create an equitable education recovery, but communities are now facing a disheartening deficit in organizations who can metabolize these resources to scale strong education programming.

- At the same time, this surge in funding is short-term, and without strong evidence of progress and results, the political will to sustain supports in the long term will evaporate.

The stakes are high. We collectively risk failing generations of students who face unprecedented levels of academic need, social-emotional support, and basic services to achieve economic independence and choice-filled lives.

Fortunately, there are education entrepreneurs who are pioneering innovations across these three impact strategies to step up and meet the needs of the moment.

Figure 1 > Reinforcing Benefits of Direct, Widespread, and Systemic Impact Strategies

Serves students

Enables others to serve students

Direct Impact

Widespread Impact

Systemic Impact

Serves as a "test kitchen" and demonstrates what works to be replicated by others

Enables wider adoption of model; funds R&D and creates lessons to share back to Direct Impact model

Provides evidence and insights; builds credibility to shift systemic conditions

Creates systemic conditions that enable broader adoption of programs aligned to an organization's ultimate vision

Builds coalition of partners with shared values who provide broader proof points of program success; provides more visibility and credibility on what systemic change is needed

How Does Pursuing a Mix of These Three Impact Strategies Address the Need for Education Equity?

Pursuing a mix of Direct Impact, Widespread Impact, and Systemic Impact strategies is critical for organizations seeking to create greater equity for systemically marginalized students:

- **Direct Impact** involves organizations providing effective educational supports directly to communities who need them, and demonstrating that with the right supports, *all* students can succeed. It also serves as a crucial grounding for what to share with partners via Widespread Impact and what to advocate for systems to adopt via Systemic Impact.

- **Widespread Impact** contributes to equity at several levels. It radically expands the spread of strong evidence-based practices to schools, postsecondary institutions, and community-based organizations (CBOs) that serve systemically marginalized communities and are often led by members of those communities. These CBOs frequently do not have access to evidence-based resources because they're often caught in a catch-22 of not receiving sufficient funding because they lack evidence and scale while lacking evidence and scale because they do not receive sufficient funding. At the same time, their expertise as well as their knowledge of the needs and assets of their local community are often ignored. Widespread Impact models transfer strong evidence-based practices to aid those CBOs in accelerating their growth and results, helping them overcome barriers to size.

  Strong Widespread Impact models also explicitly make space for local schools and CBOs to further customize the content and implementation of programs to their local context and innovate on those evidence-based practices by leveraging their understanding of the needs and assets of their communities. Strong Widespread Impact models are then positioned to help communities share those innovations broadly to support each other and expand their own impact.

  Collectively, Widespread Impact models allow an organization the ability to reach more communities and in ways relevant to and leveraging the assets of those communities. Simultaneously, Widespread Impact can also support local partners to grow more rapidly, share their innovations, and access more funding.

- **Systemic Impact** disrupts the conditions that have created and held racist and classist inequities in place over the course of America's history. Systemic Impact seeks to create and sustain new conditions by which successful education innovations are deployed to benefit *all* communities. And it seeks to ensure that funding for these innovations is sufficient and then efficiently, effectively, and equitably distributed. Systemic Impact also ensures that systems are truly democratic and decisions are shaped by the agenda of communities being served.

There is no formula or limit on the size or age of an organization in transitioning from a Direct Impact to a Widespread Impact or Systemic Impact model. Local organizations as well as national organizations should have access to capacity-building that enables them to pursue all three strategies to achieve their ambitions both locally for the communities they are in and nationally for the communities where they aspire to be.

How Does This Playbook Support Organizations to Broaden Their Impact Strategies?

This framework isn't a recipe. Rather, it's meant to be a pragmatic playbook for education entrepreneurs interested in expanding their work within or across Direct Impact, Widespread Impact, and Systemic Impact strategies. It draws from the lessons education entrepreneurs have shared with us across whole-school models as well as programs that focus on rigorous, evidence-based, personalized, and relationship-driven supports like tutoring, whole-child programming, and postsecondary advising. The original genesis of this analysis was to explore how organizations expanded from Direct Impact to Widespread Impact models. However, we soon discovered that this evolution was frequently linked to larger ambitions to create Systemic Impact, and we expanded the scope to consider how all three strategies interact (even as our significant focus remains on Widespread Impact).

We *do not* intend for this to be a "grand unified theory of everything," but we *do* hope it's a strong, practical resource that covers many of the decisions organizations are making about how to maximize their impact: how they work within and across each impact strategy; the deliberate choices they've made in program design; what this has meant for how they measure their impact; and what changes this has required around talent, systems, and organizational design. We're excited to continue learning from the successes and challenges organizations face in advancing these three strategies for impact.

Direct Impact: Where Many Education Entrepreneurs and Innovations Begin

The importance of being direct. Social change often begins when an innovation is generated by an individual or set of individuals invested in meeting an unmet education need within a community. That innovation needs to be tested, refined, and demonstrated in initial prototyping and then (depending on the ambitions of the entrepreneurs) in scalable practice. Most education innovations begin with a Direct Impact strategy so entrepreneurs can retain control and accountability for building their program.

Focusing on Direct Impact in the early days of an organization also affords it an opportunity to be proximate to the beneficiaries and communities served. This enables organizations to evolve their models grounded in the needs of those beneficiaries and communities by building authentic relationships and getting direct feedback.

These entrepreneurs may continue to focus on Direct Impact because what they're doing works, because they desire control to ensure fidelity and quality, and/or because there's demand within their community or other communities that fuels their continued Direct Impact growth.

Direct Impact involves a multitude of design decisions. Even organizations focused exclusively on Direct Impact must continually reflect on and make a complex set of decisions about how they want to design and evolve their education innovation.

For example, whole-school models have a dizzying array of design elements they must consider — from unifying visions and values to structuring the school day to curriculum to talent pipelines to busing and bell schedules.[2]

Organizations that provide more specific education programming, like tutoring, whole-child supports, and/or postsecondary advising, may have a narrower focus than operating an entire school, but they still must make a host of deliberate decisions about their program's design (Table 1).

This is not a small list, but it is an inescapable one. Organizations make these decisions on their program model either deliberately or de facto, and alongside business model decisions (e.g., cost drivers, sources of revenue, and goals around financial sustainability).

Organizations expanding their Widespread Impact models must also be clear on these elements of program design as a starting point to decide what they want partners to replicate and what they want partners to co-create.

Some organizations may run a single program model. Others may deliberately run multiple variations on their programming to test different innovations, to be responsive to the local needs and contexts (and sometimes constraints) of different communities, and/or to test the ratio of effort to outcomes (or return on investment — ROI) of different program models.

Table 1   Direct Impact Design Decisions

Design Decisions	Definition
Target Beneficiaries	What is the target profile of individuals an organization is seeking to serve?
Measures of Impact	What is the mix of inputs, outputs, and outcomes an organization uses to manage, maximize, and demonstrate its impact?
Curriculum/Content/ Program	What does an organization provide to achieve impact?
Dosage	What is the amount of support required to achieve impact? What is the *duration* (overall length of program), *frequency* (how often beneficiaries engage in programming), and *intensity* (amount of time per engagement)?
Format	How does a program happen (e.g., is it in person, virtual, or hybrid; is it live, self-directed, or hybrid)? Where does it happen (e.g., at school or elsewhere)? When does it happen (e.g., during the school day, before or after the school day, on evenings or weekends, or during summer break)?
Mix of Talent and Technology	Where is programming provided by a person, and where is it provided via technology (e.g., an online learning platform, or engagement via a chatbot or texting)?
Source of and Support for Talent	Who is providing programming? Is it full-time staff or part-time staff? Is it professionals, paraprofessionals (from sources like AmeriCorps), or volunteers? What is the mindset and skill set required? Is there a target age, such as near-peer? Where is talent sourced from, and how is it screened and hired? How is talent trained, coached, and managed?
Ratio of Beneficiaries to Talent	Is programming provided one-to-one (e.g., a single student working directly with a single tutor in a session)? One-to-two? One-to-four? Are all students engaged in the same programming in a session, or are they doing different things (e.g., some getting tutored directly, while others are doing independent work)?
Caseload of Talent	Based on source of talent, program model, dosage, and ratio, what is the caseload of talent? *(Note: This differs from ratios, in that ratio is what happens in a session. A tutor could provide tutoring in a ratio of one-to-two — one tutor to two students in a session. But they may be full-time staff running 15 sessions a week for a caseload of 30 students.)*
Level of School/ Partner Integration	For some education models provided by a nonprofit (e.g., an outside tutoring organization, mentoring organization, or postsecondary advising organization), programming may not be linked or coordinated with what is taught in school. In other cases, programming is closely aligned to and coordinated with classroom curriculum.

For example, Saga Education (Saga) is an engine of innovation seeking to transform education through rigorous, personalized, and relationship-driven tutoring. When Saga was founded in 2014, it initially provided a one-to-two tutoring model focused on Algebra 1, conducted during the school day and aligned with classroom work over the course of a school year. The University of Chicago Education Labs conducted a randomized controlled trial (RCT) on this model that demonstrated up to an additional 2.5 years of math learning. Saga then piloted a blended model of four students per tutor, with two working online for half the session with light observation and two working directly with the tutor; the pairs then switched midway through the session. This model also demonstrated strong results in an RCT — almost the same as the original model. During the pandemic, Saga has piloted six students per tutor in a virtual model, with two sets of three students switching between online work and direct tutoring. Alan Safran, Saga's co-founder and CEO, observed, "We want to respond to the needs of school systems to make this viable on Title I funding in order to reach more students while continuing to achieve strong results."

The impact of COVID-19 and technology on program design. The pandemic has disrupted the status quo of education in many ways, and we're all on a journey to understand what a post-pandemic world looks like. COVID-19 has only accelerated a shift by many education organizations to leverage technology — not as a substitute for talent, but instead as a supplement to amplify talent and also to meet students when and where they need support. Changes borne out of crisis-based necessity may ultimately become long-term effective evolutions of practice for some programs and some communities.

While some technology-based COVID-19 interventions have not landed well for some students, others have become work-in-progress innovations that: (1) reduce barriers to student participation, (2) further customize and optimize content and engagement with each student, (3) reduce costs per unit of outcome, and/or (4) broaden the pool of talent able to provide elements of programming because the constraints of colocation are in some cases relaxed.

Limits to Direct Impact. Some organizations focus only on expanding their scale through Direct Impact models. They may want to continue exercising control over their model as they grow to manage fidelity. The market for continued Direct Impact growth may exist at the pace of growth some organizations seek. However, other organizations may hit limits on growth through their Direct Impact strategy.

- **In some cases, leaders experience Direct Impact fatigue because growing via Direct Impact is hard in general — and even harder during a pandemic.** Saga was successful in growing directly for years, but over time the challenges became exhausting. As Safran explained: "I had the idea to double [in scale] and double again on the Direct Impact side before expanding to Widespread Impact, but this places a huge strain on our organization, and lots of potential district partners are still suffering too much COVID volatility to make implementing our Direct Impact model in their schools easy. We are slowing Direct Impact growth for the next few years; we have to take a breath. I don't love the phrase 'go slow to go fast,' but now I get it. And we're seeing huge potential in our other impact strategies."

- **Leaders may experience limits on what funders want to fund, what partners may want to pay for (versus providing themselves), and/or limits as leaders on what amount of funding they want to be on the hook for raising.** For example, uAspire, founded in 1985, seeks to ensure that all young people have the financial

information and resources necessary to find an affordable path to and through college.[3] The organization works toward this goal by directly advising students through the financial aid process, training school counselors and college access providers to better support students as part of its Widespread Impact, and engaging in policy and advocacy work to drive Systemic Impact.

Jaclyn Piñero, uAspire's CEO, found that "it was so expensive to add advisers in different schools, fundraising wasn't keeping pace, and the school districts didn't have the capital to enable uAspire to hire at the pace that we knew students needed us. So we added our Widespread Impact capacity-building approach."
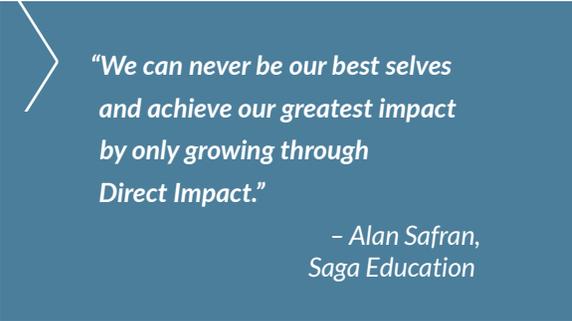
Citizen Schools, a national nonprofit founded in 1995 to help all students thrive in school and beyond through hands-on learning and mentors, also ran into a version of this challenge.[4] Former CEO Emily McCann shared, "What we started to hear were requests from our district partners who said, 'This is all great, but I can only afford it because of the American Recovery and Reinvestment Act money coming in. And the minute that goes away, this becomes too expensive a proposition. Teach us how to fish on this.'"

Another nonprofit CEO, reflecting on the burden of fundraising Direct Impact models, added, "I have a $36 million annual mortgage on my Direct Impact model right now; I can't imagine making it a $72 million mortgage."

- **Organizations may find their ability to grow Direct Impact is limited by political and policy barriers.** For example, in some communities, charter schools face charter caps or political opposition to further direct school growth. For other education innovations, this could involve limits on available funding or policies that promote program models that an education organization does not agree leads to impact. AJ Gutierrez, co-founder and chief of marketing and communications at Saga, noted: "We've gotten the U.S. Department of Education to allow American Rescue Plan Act funds to be spent on tutoring. So now that that guidance is out there, we want to make sure there are guardrails for what high-impact tutoring looks like, because it's up to every state to interpret."

- **And for some organizations and their leaders, the trajectory of Direct Impact growth is simply too slow and too limited to achieve their ultimate aspiration for impact.** We heard this repeatedly. As Safran from Saga shared, "We can never be our best selves and achieve our greatest impact by only growing through Direct Impact."

> *"We can never be our best selves and achieve our greatest impact by only growing through Direct Impact."*
>
> *– Alan Safran, Saga Education*

Springboard Collaborative, (Springboard) founded in 2012, closes the literacy gap by closing the gap between home and school.[5] Alejandro Gibes de Gac, its founder and CEO, shared a similar observation: "You don't need a crystal ball to know that any intensive direct service program model is almost fated to a logarithmic growth curve that flattens well short of solving the problem at the scale at which it exists."

OneGoal, founded as an after-school program in 2007, works to eliminate the degree divide in America by focusing on the pivotal transition years from high school through the first year of postsecondary education. OneGoal's CEO, Melissa Connelly, reflected: "When I joined OneGoal, I made it clear that I had no interest in leading an organization that was about expansion of a program on a linear model of regional site expansion.

It just didn't speak to me and my mission and vision as a leader. I see this work as about ensuring that 10 years from now, there's a complete reimagination of what supporting and advising young people looks like across our country in a way that is far more equitable and far more rigorous."

When organizations begin to hit limits on their Direct Impact (or as they anticipate limits on the horizon), they can turn to both Widespread Impact and/or Systemic Impact. Widespread Impact can radically expand the ability of others to adopt elements of their model. Systemic Impact can remove barriers and create conditions that enable their Direct Impact and Widespread Impact models to further grow.

How Direct Impact positions organizations to expand into Widespread Impact. An organization's Direct Impact model serves first and foremost as a proof of concept and credibility builder for partners seeking to replicate an organization's model. Put simply, partners want to adopt what works.

Organizations develop evidence of their Direct Impact at various levels of rigor. Some larger organizations have the benefit of detailed program evaluations and even RCTs, and their results become the basis for credibly attracting Widespread Impact partners, as well as influencing Systemic Impact. Saga's Safran highlighted that: "What's important for any nonprofit, before you can even consider moving to Widespread Impact, is that you have to build credibility in your core work … We have this really audacious goal to inspire schools and districts to reimagine their approach to human capital, budgeting and scheduling to provide personalized, high-impact tutoring during the school day. And in order to create that kind of systems change, we know we had to have rigorous scientific evidence that shows that this type of work actually works."

We heard this theme — the importance of evidence — echoed repeatedly by education entrepreneurs. However, creating this evidence base is also expensive and resource-intensive, especially if it requires an RCT. Too few organizations have access to funding to prove efficacy via an RCT even as they see the value of their work every day in their communities. From an equity perspective, it's important to ask communities what measures are important to them to demonstrate value while also providing more support to organizations that want it to conduct RCT-level (or other rigorous) evaluations.

An organization's Direct Impact model also serves as a "test kitchen" to continually experiment and refine the program it's then sharing through various Widespread Impact models. As referenced above, this may include efforts to test different program designs for different target beneficiaries and/or to test different ROI trade-offs. Testing different Direct Impact model variations with Widespread Impact in mind can also push organizations to grapple with true non-negotiables or minimum-viable products as they begin to consider what partners are willing and able to pay for and successfully adopt.

For some organizations, transitioning into Widespread impact is only a matter of time. Former Citizen Schools' CEO McCann reflected, "Baked into the DNA of Citizen Schools was this notion that there are far too many students for Citizen Schools to ever serve directly, and that we wanted to create the conditions in which models like Citizen Schools could take root (even if they look slightly different across the country) because we knew that was key to long-term student opportunity."
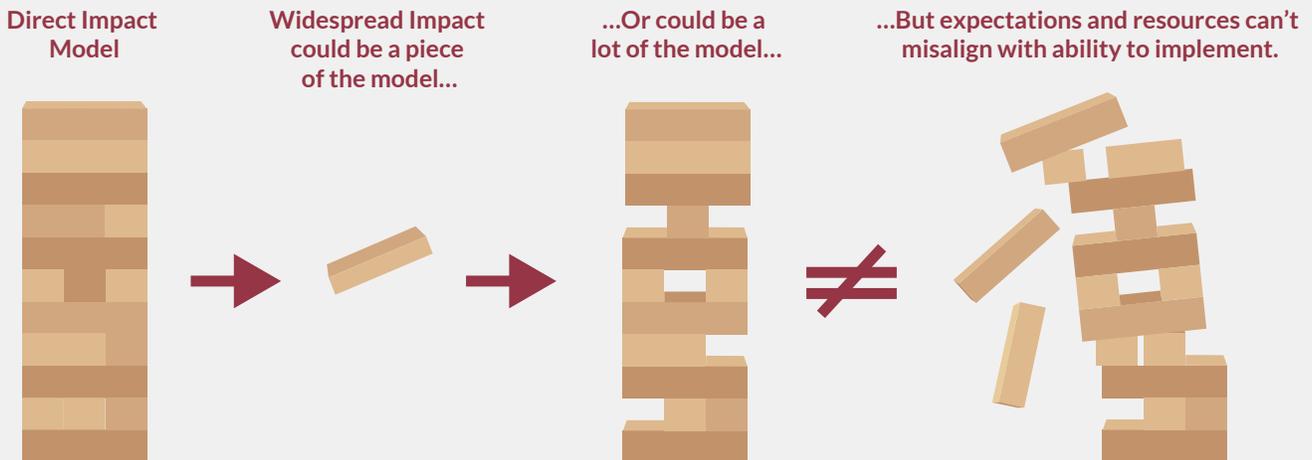
How did organizations like Citizen Schools successfully make the transition from Direct Impact into Widespread Impact?

Widespread Impact: A Game of "High-Impact Jenga®"

Widespread Impact is a strategy for how an organization builds the capacity of partner organizations to replicate elements of its program model.

Widespread Impact is all about trade-offs. By its very nature, a Widespread Impact strategy means having less control than running a program directly. Within Widespread Impact, there are a range of models that organizations can employ. An organization designing a Widespread Impact strategy must go through a design process of "high-impact Jenga®" as it determines what elements of its Direct Impact model it wants partners to be exposed to and replicate, and what's required to make that happen. Along the way, the organization must take great care to ensure that expectations and resources align with ability to implement (Figure 2).

Figure 2 〉 Widespread Impact as a Game of "High-Impact Jenga®"

Direct Impact Model

Widespread Impact could be a piece of the model…

…Or could be a lot of the model…

…But expectations and resources can't misalign with ability to implement.

Specifically, high-impact Jenga® requires an organization to make trade-offs and ultimately create alignment across each of the following five decisions for any given Widespread Impact model (Figure 3).

Figure 3 — Five Decisions in Designing Each Widespread Impact Model
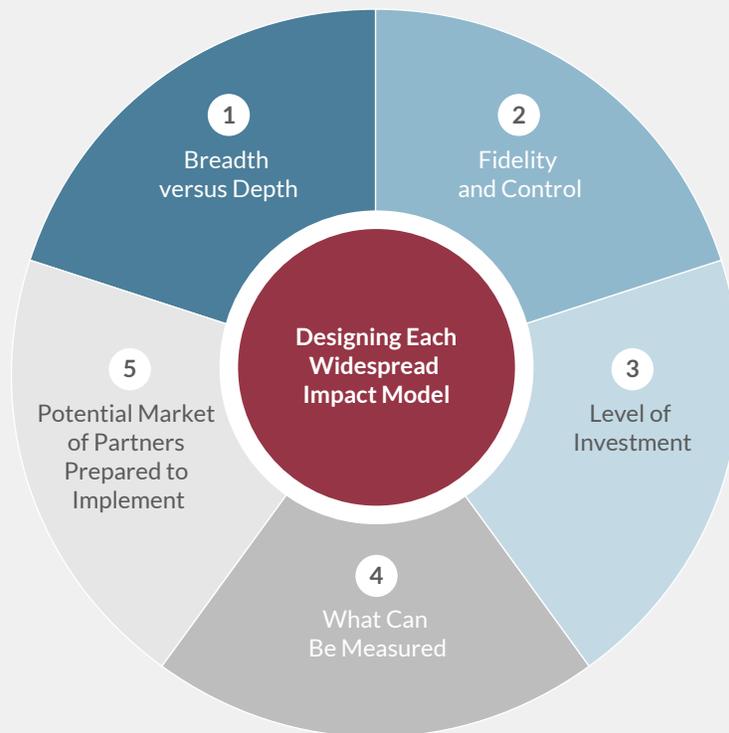
1 Breadth versus Depth: Is the goal of an organization's Widespread Impact strategy to broadly reach many more beneficiaries, but with the likelihood that the per-beneficiary level of impact is far lower? Or is the goal to more deeply impact each beneficiary, but with the likelihood that this Widespread Impact strategy will reach fewer beneficiaries or reach them at a slower pace?

Ideally, there are models that create breadth without a trade-off in depth. Where that model exists, organizations should pursue it. However, typically, organizations must make this trade-off in designing different Widespread Impact models. (Although they're not precluded from pursuing multiple Widespread Impact models, some prioritizing breadth and others prioritizing depth, as we will see in subsequent examples).

There's also no one right decision in the breadth-versus-depth trade-off. Different organizations will make different choices, which can also evolve over time.

2 **Fidelity and Control.** What level of faithful implementation should an organization mandate and expect from its partners based on prioritization of breadth versus depth? The more an organization prioritizes depth of impact, the more likely it is to require a higher level of fidelity from its partners — and the more control it's likely to want to exercise. Conversely, the more an organization prioritizes breadth, the less likely it is to be able to require the same level of program fidelity from its partners (and in some breadth examples, it may not seek any explicit level of fidelity).

For deeper models, organizations must be explicit about their non-negotiables in terms of what they want their prospective partners to replicate about their program design (such as dosage, format, source of talent, etc.).

However, organizations developing Widespread Impact models must also be explicit about what's at the discretion of partners to decide. This can be driven in part by where organizations see the need to provide flexibility to attract more partners. Crucially, this can also be driven by the fact that even in deeper Widespread Impact models, there are places where an organization's partners should explicitly exercise their power to customize programming in a way that leverages the assets and strengths of the community being served. And these local innovations in turn must be recognized, celebrated, and shared broadly, which Widespread Impact organizations can support.

3 **Investment.** The more an organization prioritizes depth, fidelity, and control, the more likely that its model will require a deeper investment of time, talent, and funding — both in what it *provides* to its partners and in what is *required* from its partners. One caveat: While breadth tactics like publications, resources, or tools may require little investment to disseminate to partners and to adopt by partners, they may require significant upfront investment to develop.

It's also important to consider what funders are willing to support — for example, some may have an appetite to fund upfront codification and design for broad dissemination, while others may only fund these elements as part of a more intensive model supporting implementation. Funders may also have expectations for how more depth-oriented Widespread Impact models develop their own long-term earned income revenue sources.

4 **Measurement.** Organizations considering a Widespread Impact model focused on breadth will be more constrained in what they can reasonably measure, with more emphasis on *outputs* like reach and engagement, and *outcomes* like satisfaction. Organizations considering a depth-centric Widespread Impact model are more engaged with partners and have a higher bar of expectations about the impact this model will have (partners will also likely have a higher bar of expectations about impact, as will funders). Deeper engagement typically equates to measuring more, including in some cases student outcomes — either assessed by a Widespread Impact organization or collected via agreements by partners to report student outcomes (see the Appendix on Widespread Impact measurement). Deeper data collection and analysis may also require deeper investment of resources by both the organization and its partners.

5 **Target Market of Partners Prepared to Implement.** The more a Widespread Impact model is a breadth play with little expectations of fidelity, control, investment, and measurement, the larger the potential market is, simply because what's being offered (like research and tools) is easily and in many cases freely available. As Widespread Impact models focus more on depth (and require greater commitments of fidelity, a partner's comfort with more outside control, more investment, and a higher bar of measuring progress and success), the target market of partners is likely to be smaller.

It's important for organizations to consider which potential partners are ready to commit to the required level of change. We heard repeatedly from education entrepreneurs about how important partner buy-in is to successfully implement a more depth-oriented Widespread Impact model.

Organizations can use these five design decisions to shape their selection from a broad array of Widespread Impact models (Figure 4).

Figure 4 — Widespread Impact Models
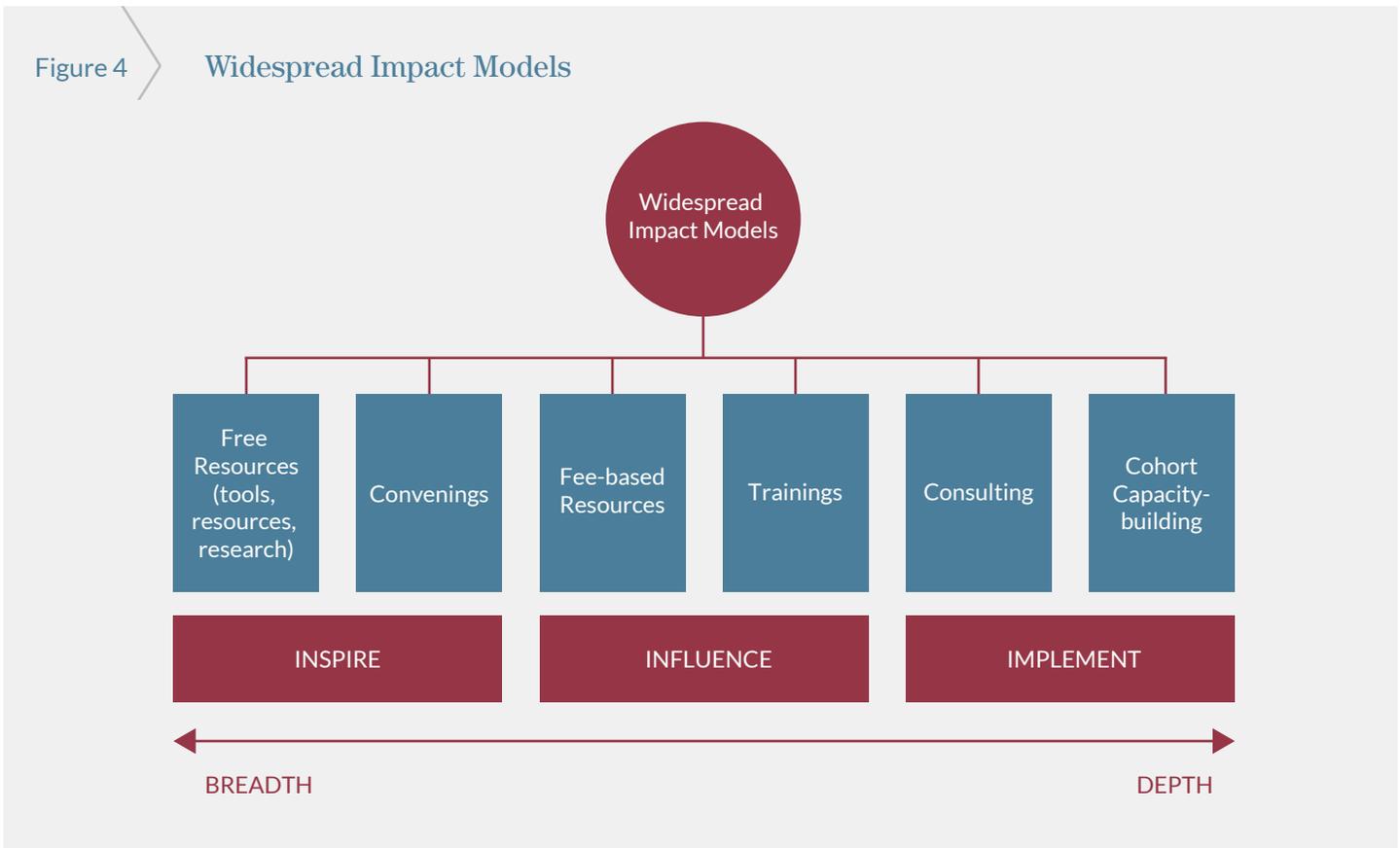
These models are not mutually exclusive (though they're hopefully collectively exhaustive). Organizations can pursue Widespread Impact models in any sequence or combination. However, we have observed in interviewing more than a dozen education organizations across the country that Widespread Impact models tend to cluster into three distinct categories:

- **Inspire:** Shift what partner organizations think is possible and support their independent work.
- **Influence:** Actively influence a change in programming but with little control over fidelity (though there still may be strong fidelity in practice) and more limited investment and measurement.
- **Implement:** Make significant commitments from both Widespread Impact providers and their partners to implement key elements of a program with more oversight, a longer investment and relationship, and more significant measurement of results.
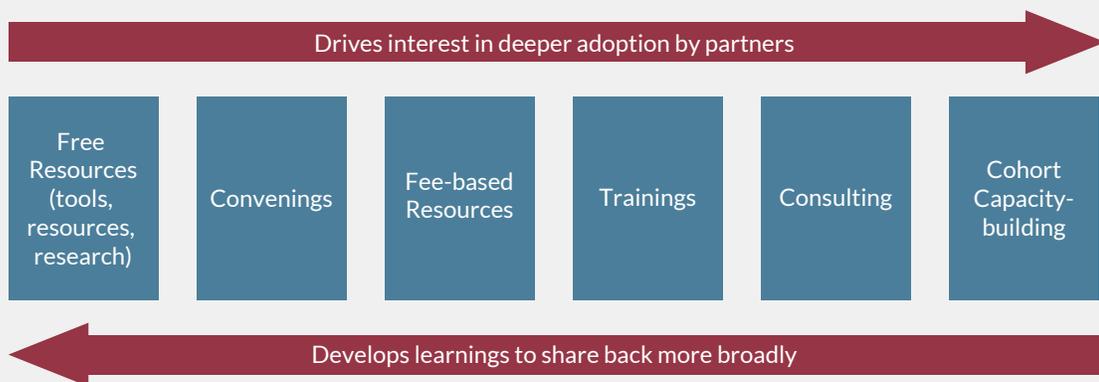
Some organizations have a strong sense of the level of depth, fidelity, and investment they want to make, and therefore focus narrowly on one Widespread Impact model.

Others have a strong vision of where they want partner organizations to go but offer a range of Widespread Impact models to meet a larger number of potential partners where they are.

Widespread Impact models are frequently mutually reinforcing. Breadth models can be the entry point to prospective partners becoming more aware of an organization's program for impact and building greater interest in "going deeper" into greater commitment and investment in adopting elements of that organization's program.

Depth models, with their focus on implementation, are also a source of ongoing learnings that can be shared back broadly through the Widespread Impact models on the left side of the continuum (Figure 5).

Figure 5 > Reinforcing Benefits of Widespread Impact Models

Drives interest in deeper adoption by partners →

| Free Resources (tools, resources, research) | Convenings | Fee-based Resources | Trainings | Consulting | Cohort Capacity-building |

← Develops learnings to share back more broadly

Overview of Each Widespread Impact Model

Inspire:

- **Free resources** encompass anything an organization makes freely available for other organizations to access, including:

    > **Signing up to be members of online communities** and **receiving content** (including through social media).

    > **Research and publications**, such as the Center for First-generation Student Success's (The Center's) Journal of First-generation Student Success.

    > **Free curriculum and training.** Examples include Saga Education's tutor math curriculum and tutoring training (Saga Coach), Match Education's teacher training modules (Match Minis), and Achievement First's open-source curriculum.

    Frequently, the only commitment Widespread Impact partners are required to make is to sign up with an account so organizations can identify them.

    Generating free resources and content as a Widespread Impact model has multiple benefits, even if it's hard to expect or track deeper outcomes. First, free content raises the profile of an organization — its mission and vision, impact strategies, and underlying program model — to a wide range of stakeholders, including funders. Second, it can shift mindsets about what's possible, leading other organizations to change their programming without further support. Third, it can drive interest in the deeper models of Widespread Impact an organization offers and act as a marketing channel. And fourth (and this is where Widespread Impact and Systemic Impact often overlap), free content can be directed at shifting mindsets and possibly priorities of those with authority to drive systems change.

- **Convenings** include any small or large gatherings where an organization is bringing stakeholders together around a common purpose of learning and sharing. These also can have training modules embedded, but they are usually short, time-bound events. They may be free or require a fee, but aside from that, they require little commitment from participating partners who can come to learn, network, and be inspired but aren't getting an intensive investment to build their capacity. In-person and virtual examples abound, including Big Picture Learning's Big Bang conference and the Center's annual conference.

Influence:

- **Fee-based resources** are resources that, unlike in the previous free model, Widespread Impact partners must pay to use. Some organizations begin with offering free resources to test the market, and then evolve these offerings into purchase or subscription models as demand grows and content becomes more rigorous. Other variations include organizations that offer both a complementary version and a premium model, such as Fishtank Learning, which provides both a set of open-source education resources and a graduated set of subscription-based resources. Increasingly, fee-based resources are moving beyond paper to online content and professional development, apps, and data systems.

- **Trainings** can be a one-time engagement or multi-session engagements with a partner or a group of partners. This requires more intensive time commitments and is usually a fee-for-service model but typically requires little to no fidelity of adoption or control. Trainings don't include one-on-one, tailored, deep engagement over time with a partner organization, where there's an expectation of supporting them in deeper model implementation — we define that as consulting.

Implement:

- **Consulting** becomes a deeper investment by organizations pursuing Widespread Impact models and their partners through tailored, intensive collaboration and support. Because this is more intensive, Widespread Impact organizations often have a higher bar for selecting which partners they are willing to work with based on the level of fidelity and investment those partners are willing to make.

- **Cohort capacity-building** is a deeper commitment of time by organizations and their partners that is formal, structured, and highly participatory. It also requires a deeper commitment by partners to implement key elements of an organization's model. Prospective partners often must apply through a selection process. Depending on philanthropic support, partners may be required to pay, and some organizations believe it's crucial for their partners to have skin in the game to invest in implementing a Widespread Impact model. Typically, there's significant measurement — even if qualitative — about a partner's implementation of key elements of an organization's model, as well as tracking of beneficiaries' performance outcomes. Widespread Impact providers may also provide different tiers of cohort capacity-building, progressing from a "101" to a "201" advanced participation level, and eventually securing a seal of approval or even credential to signal their successful implementation of a model. This may ultimately lead to a formal affiliate or franchise network, which is as close as an organization can get to growing its Direct Impact model without doing it themselves.

Widespread Impact in Action

Here are four examples from the many entrepreneurial organizations we interviewed that illustrate the different ways to pursue one or a combination of Widespread Impact models:

Saga Education: Starting With "Inspire" and Adding Greater "Depth" Models Over Time

At the onset of the pandemic, as education systems faced monumental disruption and were attempting to triage education continuity, Saga accelerated the growth of its Widespread Impact strategies out of a desire to help and in response to a wave of demand. As Safran, co-founder and CEO, reflected: "We've learned a lot over 17 years, and at this point much of that's codified, so we could put that out and make it free … sharing as much as possible now to help meet the urgent need." Saga rapidly prototyped and refined a range of Inspire Widespread Impact models with the broadest possible reach to create an equitable post-COVID-19 education recovery:

- Saga Coach: A free, self-paced training portal for any organization or individual to use in developing the mindsets and habits of a successful tutor, with particular emphasis on relationships, ratio, and rigor.

- Saga Connect: An online learning platform with integrated audio-video conferencing capabilities and digital scratch pads and whiteboards equipped with math tools for live tutor-student interactions (Saga provides a free version and a modestly priced version to host the audio and video in-house).
- Saga Curriculum: A free, high-quality math tutoring curriculum that tutors can use with their students based on what Saga uses in its Direct Impact model.

At the same time, Saga knew these Inspire breadth offerings wouldn't be sufficient to meet the needs of many districts and other nonprofits asking for help to implement rigorous tutoring. In 2021, Saga developed and continues to refine Saga Consult, an Implement model providing hands-on consulting and technical assistance to help organizations develop and implement high-impact tutoring programs. Consulting engagements begin with customized program design, consulting on sourcing tutoring talent, tutor training, access to Saga's free tools, and intensive support on how to deploy them. As partner programs get up and running, Saga also provides a tool to measure student progress and conducts observations to support implementation fidelity.

Through all its Widespread Impact models, Saga continues to learn from different potential partners what they need in order to successfully implement tutoring. This is now leading Saga to explore an even greater depth model in the form of a multiyear cohort capacity-building program by working with a range of districts to implement high-impact tutoring in their schools, have them demonstrate evidence of impact to stakeholders, and see this shift budgeting and school schedules to make tutoring a sustainable norm.

Looking across Saga's Widespread Impact offerings, Safran sees offering breadth options as a path to achieving more depth and even systems change goals: "We can step in and get our profile raised so that a lot of people notice us and they take advantage of our free products first, and then they want more … sharing our DNA is the best pathway to hoping that at the end of the next three years, schools change their schedules, budgets, and human capital approach to build tutoring into the school day. That's our clear, strong, strategic vision."

Valor Collegiate Academies: Prioritizing "Implementation" via Cohort Capacity-Building

Valor Collegiate Academies (Valor) is a network of charter schools in Nashville, Tennessee, that, since launching in 2014, have been ranked in the top 5% of Tennessee schools for growth and achievement, and "exists to empower our diverse community to live inspired, purposeful lives," through a holistic human development model called Compass.[6]

Todd Dickson, Valor's founder and CEO, shared that its pivot into Widespread Impact was "a response to strong interest," based on its success as a whole-school operator and the resulting publicity generated about its holistic human development model. As Dickson reflected on how to build the capacity of others to replicate their model, he noted that the Valor team "really cared about quality; we wanted it to be really strong. We weren't convinced the type of work we were doing with comprehensive human development could just be shared [via an Inspire model] because it could be implemented really poorly." He continued, "We'd rather be small but have a lot of strong success points than risk sharing the model with a bunch of people who then say 'it doesn't work' because they didn't implement it correctly."

Based on these priorities, in 2017, Valor launched Compass Camp, an intensive cohort-based capacity-building and certification model. Prospective partners move through a rigorous application process that includes multiple steps, such as building internal buy-in and surveying their staff to ensure the demand exists to fuel a long-term partnership. Partner schools are accepted into three-year cohorts of 15 schools that convene two to three times a year at Valor for intensive training. Cohort members also receive weekly coaching and yearly school site visits. In year one, Compass Camp participants focus on transforming adult behavior and deploying Valor's comprehensive human development model with teachers and staff. Camp participants then spend years two and three implementing the model with students in the classroom. Along the way are multiple "gateway" assessments that help schools and coaches know if they're ready to move forward in the certification process. These include weekly walkthrough data, survey data, portfolio artifact submissions, and faculty and student interviews. Once schools successfully complete the final gateway assessment (generally at the end of year three), they are celebrated and "credentialed," becoming part of a new and growing "Powered by Compass" network of schools.

Valor recently introduced a less intensive additional cohort capacity-building option called Compass-in-Leadership, a two-year cohort-based program for individual school leaders (primarily principals). Unlike Compass Camp, there are no specific requirements to implement Compass practices, and schools and leaders are not certified. This approach is accessible to many more leaders, fostering broad Compass-in-Leadership alumni networks and opportunities for ongoing collaboration.

Envision Learning Partners: Starting with "Implement" Consulting and Adding More "Depth" and "Breadth" Models Over Time

Envision Education's (Envision's) mission is to "transform the lives of students — especially those who will be the first in their family to attend college — by preparing them for success in college, career, and life."[7] Founded as a charter management organization in 2002, Envision runs five charter schools in the Bay Area. A hallmark of Envision's model is its Portfolio Defense performance assessment, which challenges learners to make and support claims about targeted skills by curating their work into a portfolio and defending their claims in an evaluated presentation, a motivating and meaningful experience for young people.

Envision Learning Partners (ELP), Envision's Widespread and Systemic Impact arm, was born out of demand from schools and districts to adopt its Portfolio Defense model. Justin Wells, ELP's executive director, shared that "people were knocking on the door, interested in our model — the Envision Learning Partners concept grew organically out of that. We began to think that maybe we can expand our ideas through a consulting concept."

Wells noted that ELP began by "just getting on an airplane and showing up to do professional development" with teachers and leaders, and delivering a Widespread Impact model focused on coaching leaders and teachers to implement the Portfolio Defense model in their local context. ELP's success and continued demand for its consulting work led the organization to scale up. In 2021-22, ELP had fee-for-service consulting contracts with 45 schools and districts across 12 states employing 21,000 teachers and serving 360,000 K-12 students.

Building on the initial success and learnings of this consulting model, ELP expanded its Widespread Impact strategy into both more breadth and depth options.

ELP has expanded into two additional depth models to "continue to prove our model in a deep way," according to Wells. ELP serves cohorts of districts in states that have adopted performance assessment as part of its graduation requirements through ELP's Systemic Impact work. Another cohort model is ELP's Deeper Learning Leadership Forum, a roughly 18-month program sponsored by the Hewlett Foundation that convenes groups of 20 current or aspiring school system-level leaders to address an equity challenge in their network, using performance assessment as part of the solution.

Over time, ELP has also added a range of additional breadth offerings, including free resources (e.g., quality criteria documents), blog posts available on its website, monthly online informal "lounge" opportunities for educators to connect in community, and one-off trainings open to the public.

Wells sees ELP's expansion into breadth models as unlocking multiple reinforcing benefits:

- **Impact potential:** "I often notice in education a tendency to feel like we have to get everything right before we try something ... but I think people underestimate how transformative even one deep learning experience can be for a student. It can also have a pretty big impact on teachers and school leaders who witness it."

- **Potential reach:** "At some point, there's the pure numbers of it. How can we take advantage of the fact that there are a growing number of leaders out there that feel like they should be providing something more memorable or deeper for students?"

- **Generating interest in depth offerings:** "I see spreading the concept of Portfolio Defense performance assessment as sort of like tilling the fields for potentially deeper work that could happen down the line."

Ultimately, the full spectrum of Widespread Impact models offered are vital to achieving ELP's larger vision to "build a diaspora of people that identify with this work. I'm very interested in what happens when educators start to see 'assessment expert' as part of their professional identity," according to Wells.

The Center for First-generation Student Success: Spanning Across the "Breadth-Depth" Spectrum

The Center transforms institutions of higher education (IHEs) to effectively and equitably serve first-gen students so they can succeed in their education, career, and life. The Center began as a Direct Impact model piloted by The Suder Foundation in eight IHEs as a holistic approach to elevate "self-awareness, success, and significance" for first-gen college students.[8] These initial pilots demonstrated a rigorous impact on student persistence, graduation, and grade point average. Based on the Center's initial work, Deborah and Eric Suder, founders of the Suder Foundation, searched for a platform to replicate and accelerate the model nationally. In 2017, they founded the Center as an initiative within NASPA, an association of student affairs administrators in higher education.

The Center's signature Widespread Impact model is its First Scholars Network (First Scholars), an intensive multiyear cohort-based experience where IHEs are selected using a custom Institutional Readiness Assessment. First Scholars provides a combination of diagnostics, tools, resources, community, and expert guidance to

transform IHEs in their mindsets and actions to strengthen first-gen student supports and outcomes. The model is grounded in the use of data-driven continuous improvement, with leadership teams at each IHE (1) learning to use data with the guidance of the Center to identify challenges and opportunities to first-gen success, (2) responding to those challenges and opportunities with changes to programming, (3) using data to continually iterate on and strengthen their first-gen supports, and (4) building the long-term institutional infrastructure to sustain data-driven first-gen support programs. Through the Center's diagnostic tools, First Scholar institutions learn from their own data while benefiting from a community of peer institutions across the country.

However, First Scholars is not the Center's only Widespread Impact model. The Center also provides a range of Inspire and Influence models. Within Inspire, the Center provides significant free content, including: the research-based _Journal of First-generation Student Success_; an online platform that aggregates content on first-gen student supports, insights, and analyses of the first-gen student landscape; online learning opportunities; and the National First-generation College Celebration, which is a national convening and a toolkit to enable individual IHEs to host their own local or regional first-generation celebration events. The Center also offers Influence Widespread Impact models through paid-for tools, trainings, and speakers via its CatalystFIRST model.

These Inspire, Influence, and Implement Widespread Impact models do not exist in silos but rather are mutually reinforcing. Sarah Whitley, vice president of NASPA's First-generation Student Success Initiatives, and who leads the Center, shared: "All of these activities broadly shift mindsets and actions about first-generation students while also establishing interest from a pipeline of IHEs who want to join the First Scholars Network. At the same time, we learn so much from the First Scholars Network that should not be confined to just First Scholars Network participants. The work of the Center provides important avenues for knowledge creation and dissemination, networking, and the sharing of important lessons broadly. Together, this becomes a mutually reinforcing cycle of engagement with the higher education community."

Key Lessons to Maximize Widespread Impact Implementation

Organizations pursuing Implement-centric, depth-oriented Widespread Impact models must consider how to maximize the likelihood that their partners will successfully replicate the program elements they believe require fidelity to create the desired beneficiary impact.

Across our interviews, the following strong practices emerged for how successful education entrepreneurs increase the likelihood that their depth-centric Widespread Impact investments pay off (Figure 6).

Figure 6 | Lessons to Maximize Widespread Impact Implementation

Values, Relationships, and Change Management	1. Align on **values**, but be prepared to shift **mindsets**. 2. Set **clear expectations** to enable implementation. 3. Build **buy-in and sponsorship across both senior leadership and grassroots** to sustain long-term support for implementation. 4. Develop **realistic timelines** for engagement to support partners.
Program Model	1. Decide between **a "lightsaber"** (a tool/resource) **and the "Force"** (holistic program adoption) in prioritizing what partners implement first. 2. Define **non-negotiables** and then explicitly create **space for partners to customize and innovate** to meet the needs of their communities. 3. Provide **data systems** to help partners implement program model and to use measurement to manage and maximize performance. 4. Provide **technology tools** to help partners implement program model and amplify talent. 5. Continually **observe and ask for feedback** about where partner organizations are getting stuck on program model implementation.

Values, Relationships, and Change Management:

1 **Align on values, but be prepared to shift mindsets.** Organizations are guided by their values, which permeate their Direct, Widespread, and Systemic Impact strategies. With breadth-centric Widespread Impact models, organizational values are embedded in the content being shared, but because of the nature of these models (free content, conferences, etc.), the bar for required values alignment is low and left to the self-selection of partnering organizations. However, with more intensive depth-centric Widespread Impact models — and higher expectations of fidelity, greater investment, and more measurement accountability — it's essential that organizations and their Widespread Impact partners align on values.

Kingmakers of Oakland (Kingmakers), founded in 2018, holds fast to the certainty that "all Black males are brilliant, beautiful, and possess innate greatness."[9]

Kingmakers started as an in-school Direct Impact model that delivered culturally relevant curriculum and pedagogy, supported the recruitment and retention of Black male teachers, amplified student voice and agency, and engaged parents and families. Grounded in this experience, Kingmakers evolved to support schools and districts through a Widespread Impact model focused on spreading these mindsets and actions through leadership coaching, reflective practices for districts to diagnose their assets and opportunities to change, professional learning for educators, and a national community of learning and collaboration. Kingmakers also has a Systemic Impact model that drives narrative change and shapes policies to acknowledge the genius and value of Black boys and creates the conditions for its program model to flourish.

No organization can succeed as a partner in Kingmakers' programs if it's not a partner in Kingmakers' values of grounding the work in the voice and agency of young people and their community. Chris Chatmon, founder and CEO of Kingmakers, noted, "What has allowed us to scale in a way aligned with my values and our organizational values has been listening, leading with young people, and helping people understand what the issues in their community are and what assets their community brings to solve those issues." A Kingmakers partner must embrace a shared set of values not just in words but in deeds. If they do, "then we can help you on that journey, in part by providing liberatory processes that allow those who have historically never been at the decision-making table a role in the design process," according to Chatmon.

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>
> *– Chris Chatmon, Kingmakers of Oakland*

At the same time, biases can be entrenched. Some organizations still have to deliberately focus their Widespread Impact model on uprooting deeply held mindsets within partner staff to get to organization-wide values alignment and successfully enable action and implementation.

As Citizen Schools' CEO Oscar Cruz shared: "It's hard enough to scale up skills and practices; how do we scale up mindset change, which is a completely different conversation? We're starting to talk about how we have to do both, because the skills by themselves are not going to be enough to be able to replicate. To change mindsets, our aim is to embed conversations of equity and asset-based framing within the training of the teachers and volunteers to help them adjust to the way they engage in the program. For example, it is not just recruiting volunteers and matching but exposing volunteers to equity in the classroom and the systemic barriers students face. We embed conversations of equity within the volunteer training process."

Fundamentally shifting mindsets (when required) is the first step for many to embark on a journey of change. As Chatmon shared, "We model, we embed rituals and routines that build trust and relationships that allow us to learn how to listen and be in the right relationship to take on these audacious concepts, to give us the belief that we can solve them."

2 **Set clear expectations to enable implementation.** One of the most critical aspects of success for organizations developing depth-centric Widespread Impact partnerships is articulating clear expectations about mutual commitments between organizations and their partners. It's important that these expectations are outlined transparently and, in many cases, formally (e.g., a memorandum of understanding). In some cases, an organization may use a formal application process or readiness assessment to make these expectations clear up front and vet potential partners' willingness or ability to adhere to them. This allows both sides to mutually commit the resources required (be it values/mindsets, time, talent, or money) before executing. Strong, clear dialogues about expectations can also enable organizations and potential partners to avoid entering into a commitment before they're in a position to meet it.

For example, InsideTrack, founded in 2001, has a mission to "fuel social mobility and close equity gaps by empowering and advancing all learners. We use the power of coaching to support individuals in achieving their educational and career goals — transforming lives and organizations while creating social change."[10] InsideTrack delivers coaching directly and provides training, capacity building, and strategic guidance to colleges, employers, and other organizations to improve their own coaching. The organization conducts readiness assessments with potential new partners before entering into formal relationships. Ruth Bauer White, InsideTrack's president, sees these assessments as an opportunity to have a dialogue about expectations for the relationship between InsideTrack and a partner required to make that partnership successful: "Are you in a place where you can actually take on this change? Do you have the stakeholder buy-in from the top all the way down the organization to the front lines? Where are the obstacles going to be and who is going to challenge this change? This allows us to go in eyes open to create a plan that will stick."

> *"Are you in a place where you can actually take on this change? Do you have the stakeholder buy-in from the top all the way down the organization to the front lines? Where are the obstacles going to be and who is going to challenge this change? This allows us to go in eyes open to create a plan that will stick."*
>
> *– Ruth Bauer White, InsideTrack*

3 **Build buy-in and sponsorship across both senior leadership and grassroots to sustain long-term support for implementation.** Patty Diaz-Andrade, OneGoal's chief impact officer reflected, "The instability of district leadership impacts implementation as well as the fidelity of the partnership in a way that is not always predictable. That can be pretty challenging for us." Having senior leaders as champions is a best practice in change management generally, but when trying to implement a new model, having support from teachers and staff throughout the organization, as well as from parents and students, helps ensure that excitement and commitment endure throughout inevitable changes in leadership. To that end, OneGoal works with each new partner to stand up a Postsecondary Leadership Series team that includes a diverse set of stakeholders from multiple seats to own and champion their program and sustain it for the long term.

4 **Develop realistic timelines for engagement to support partners.** Change takes time; significant change requires significant time to achieve and sustain it. Widespread Impact models must be pragmatic about the length of time required to support partners (along with the level of support needed to achieve outcome goals). For example, ELP typically works with a district for two to three years. According to Wells: "By that point, there will be some newly established practice that qualifies as evidence of implementation. Maybe it's seniors defending a portfolio, or students leading their own conferences, or the entire science department using the same rubric to assess student-designed experiments. Whatever the particular practice, the school has learned how to imagine an engaging and rigorous challenge for students and work together to make it happen. Collaborative analysis of student work catalyzes ideas for what to build or improve for next year. The pump for Portfolio Defense performance assessment system building has been primed. This is when ELP quietly slips out the door."

Program Model:

1 **Decide between a "lightsaber" and the "Force" in prioritizing what change an organization wants partners to implement first.** It's often challenging for an organization to prioritize what it wants Widespread Impact partners to implement with fidelity. Sometimes, this dynamic requires a trade-off between what — in homage to the movie series *Star Wars* — we call a "lightsaber" (a tool with innate power that can be picked up and employed quickly) versus the "Force" (a holistic adoption of mindsets and practices that is much more powerful but requires a bigger commitment to learn).

Because adopting an organization's equivalent of the Force can be so daunting, some organizations lead with a lightsaber as a practical starting point with their Widespread Impact partners that quickly adds value, and over time it can then lead to an appetite by those partners to embrace greater transformation. Saga's Safran observed, "We want people to become tutoring Jedi, but we know many schools trying to recover from the pandemic need something immediate to start with that creates value and also builds stamina to set them on a bigger journey to transform their teaching and learning."

At the same time, there's often risk in merely handing a lightsaber to partners in a Widespread Impact model and thinking that will be enough to achieve deep fidelity of implementation. As OneGoal's Connelly shared: "From an educational standpoint, we often think the lightsaber is the answer — we often want the thing:

'Just give me the thing.' But whatever that thing is, its success is largely defined by the mindsets, beliefs, and values that were behind the decision to adopt the 'thing' to begin with. No wonder we often get 'the thing' and it doesn't work. All of education is littered with a bunch of things that are really beautifully designed and well-intentioned but fail miserably because the insights, the practices, the mindsets, the beliefs, and the values that undergird whatever that thing is aren't aligned with its purpose. And so, I don't know that you pick here: Are you the lightsaber or the Force? I think you have to really recognize what tools you have but also the values or belief systems that ultimately undergird those that are the right conditions for the tool to really be effective."

In the world of more depth-oriented Widespread Impact, nobody becomes a Jedi overnight. Even with strong tools introduced at the beginning of the journey, it takes dedication, hard work, and time.

❷ Define non-negotiables and then create explicit space for partners to customize and innovate programming to meet the needs of their communities. First, when an organization has spent years perfecting a rigorous Direct Impact model, it's often very challenging to distill and consider anything a "nice to have," and it may take multiple iterations to get the balance right — and that's OK. Education entrepreneurs examine this from several different perspectives.

- Springboard's Gibes de Gac reflected: "When we were pushing ourselves to figure out what Widespread Impact means for us, we disassembled the Lego Castle and took apart the intensive program into all of its components and subcomponents. When we spread all the pieces out, there were 221 tiny components that make up this intricate and effective but unscalable program. For every single one, we categorized them as one of three things: 'critical exact' (you need to do this and do it our way); 'critical flexible' (you need to do this, but do it your own way); and 'non-critical' (a bell or whistle). And that's how we went about playing the game of Jenga®, if you will, to systematically remove cost and complexity until we could get down to 30-some core components instead of the 200-plus."

- Similarly, in building out its Widespread Impact model, Citizen Schools was disciplined in what it prioritized to make it more likely that partners would be willing and able to adopt its model and focus on critical elements of fidelity. Former CEO McCann reflected: "What you need to think about is the balance of experiences you are trying to craft for your customers and ultimate beneficiaries. What we were trying to figure out was how do we boil down a list of 15 non-negotiables into a shorter list of the kinds of experiences that were critical — because there's nothing like complexity to scare people back to the status quo."

> *"What we were trying to figure out was how do we boil down a list of 15 non-negotiables into a shorter list of the kinds of experiences that were critical — because there's nothing like complexity to scare people back to the status quo."*
>
> *– Emily McCann, Citizen Schools*

- Some organizations put in place mechanisms for quality control on key pieces of their program model. For example, for so much of education, talent is crucial. Many Widespread Impact models focus on developing talent, and more intensive, depth-focused Widespread Impact models may use a talent assessment as a lever of control to ensure partner fidelity and success. InsideTrack trains and then also certifies all coaches involved in delivering its model via partners. As Bauer White noted, "We've been certifying our own coaches, but now we certify coaches at partner institutions … We offer a train-the-trainer model, but we still certify — they have to come to us for the stamp of approval that, yes, they've reached our bar."

At the same time, an organization spreading a Widespread Impact model must make explicit space for its partners to customize program implementation to their local context and leverage the assets and strengths of their community and their own organization to deploy a program most relevant to, respectful of, and valuable to the community being served.

- For example, some organizations explicitly prioritize flexibility to make space for local partner agency and innovation. Envision Learning Partners' Wells shared: "A high-quality performance assessment system has to be pretty contextualized. Some of our first clients were charter schools that were committed to the preservation of native Hawaiian culture in addition to preparing students for college and career. I realized that people were interested in our Portfolio Defense system in part because it was so adaptable to their particular context, which was very different than ours. When I saw students defending their learning in native Hawaiian before a panel of community elders, the concept of fidelity suddenly went out the window. They were taking this in ways that I had never even imagined and were just beautiful."

- Big Picture Learning (BPL), founded in 1995, has a similar philosophy. Evolving from a design pioneered by co-founders Dennis Littky and Elliot Washor at the MET High School in Providence, Rhode Island, BPL's vision is to catalyze vital changes in kindergarten-through-adult education by generating and sustaining innovative, personalized learning environments that work in tandem with the real world of their greater community. BPL offers a broad range of Widespread Impact supports (e.g., school leadership coaching, training, professional development, conferences) to allow partner schools across the globe (currently numbering 70 schools in 27 states across the U.S. and 100+ more internationally in 11 countries) to adopt its model. BPL also offers more targeted tools to partner schools interested in implementing specific elements of its approach, such as the Imblaze internship management platform. When Andrew Frishman, Big Picture's co-executive director, considers fidelity, he says: "We don't believe full fidelity exists for anybody. Some of the best and most interesting innovation happens when you are not compliant, when you are not trying to be one prescriptive model. It happens with adaptations to local context. So we have a set of 10 distinguishing characteristics and a set of common design criteria about student learning experiences (10 expectations), but in terms of how you implement that, we think it's best when people are encouraged to draw from BPL's experience and success in other locations but ultimately do the heavy lifting to adapt to their local context. It's the process of figuring it out themselves, while being supported through the innovation and implementation processes, that results in local strength and sustainability."

3 **Provide data systems to help partners implement an organization's program model and use measurement to manage and maximize performance.** Multiple organizations invest in providing a data system to their Widespread Impact partners as a crucial lever to drive stronger fidelity and stronger outcomes, and to evaluate the success of their Widespread Impact strategies. Organizations noted several ways their data systems create value by (a) **supporting successful implementation by partners**, and by (b) **supporting a Widespread Impact organization's own learning, improvement, and growth**:

a. **Supporting Successful Implementation by Partners**

- **Organizations manage what they measure.** Partners are simply more likely to faithfully replicate a program when provided with the data to understand their progress and success.

- **A data system can also lower barriers to faithful program replication by providing a roadmap for partners.** A data system can provide active guidance on how to deliver programming — particularly programming with an individualized student case management component. Partners can also use a data system to monitor and manage the level of program dosage provided by their staff as well as student utilization of asynchronous, self-directed program offerings. Further, data systems are expensive and hard to develop. It's a huge selling point as well as value-add for partners to be able to turnkey a strong data system by adopting an organization's Widespread Impact model.

  For example, College Possible, founded in 2010, provides students with the information, coaching, and agency to succeed in transitioning to and then through college pathways. In addition to its Direct Impact model providing coaching across the country, it also provides CoPilot, a comprehensive data platform to manage college access and success, as a Widespread Impact model. Craig Robinson, College Possible's former president and CEO, observed, "You can't have good programming at scale without good data at scale, and that's where so many organizations are stuck — because building a strong, robust single data system based on best-practice programming is hard and expensive and time-consuming. We built CoPilot based on our lessons learned in college coaching so others don't have to."

- **A data system can include an assessment component to explicitly capture student outcome data not otherwise available.** Several organizations like Saga and Springboard provide regular, formative diagnostic assessments in their Widespread Impact models for their partners and the students they serve to get rapid, nimble feedback on learning progress that can drive performance.

- **Insights from a strong data system allow a partner organization to better advocate for a program to its internal and external stakeholders.** For example, a core component of the Center's First Scholars Network is a sophisticated data platform and training in data-driven continuous improvement. As the Center's Whitley shared, "Institutions of higher education always have competing priorities. By equipping them with data to drive outcomes, it not only improves their outcomes; it helps them make the case for the importance of supporting first-gen work, including driving funding for it."

b. **Supporting a Widespread Impact Organization's Own Learning, Improvement, and Growth**

- **Providing a data system can enable a Widespread Impact organization to track student outcomes from its partners to measure impact.** Organizations can utilize data (from their own system provided to partners, or through a data-sharing agreement with a partner's separate systems) to track not only a partner's program implementation, but also potentially their student outcomes.

- **A data system also allows a Widespread Impact organization to better understand and continually improve its own impact.** Data systems allow an organization to monitor its partners and provide feedback or active direction depending on the level of control and oversight. It also allows organizations to better understand and improve the success of their Widespread Impact models.

  Some organizations aggregate the data across a set of their Widespread Impact partners and sometimes also their Direct Impact model to build "big-data" insights to improve offerings. Beyond 12's mission, according to Alexandra Bernadotte, founder and CEO, is to "dramatically increase the number of students from under-resourced communities who graduate from college and who translate their degrees into meaningful employment and choice-filled lives." Founded in 2009, Beyond 12 supports its Widespread Impact partners in addressing college completion by providing a data system and analytic engine to support student coaching and outcomes tracking across K-12, higher education, and workforce. Beyond 12 also provides a Direct Impact coaching model and is expanding into Systemic Impact.

  The more data Beyond 12 collects on students nationally through its Widespread Impact platform (which tracks nearly 100,000 students) as well as through the coaching it directly provides, the more it can learn about what is working for which students, what are unmet or new challenges, and how to evolve coaching to address those challenges.

  Bernadotte reflected: "Because of 10 years of data collection, we've been able to build a predictive and prescriptive model that provides us and our partners with actionable insights about student risks based on their attitudinal and behavioral profile. Our focus on data-driven analytics and programming means we and our partners are constantly learning, with the intent that every year our collective coaching gets better."

  > *"Our focus on data-driven analytics and programming means we and our partners are constantly learning, with the intent that every year our collective coaching gets better."*
  > *– Alexandra Bernadotte, Beyond 12*

- **A data system allows an organization to better demonstrate its Widespread Impact value to key stakeholders.** As the Center's Whitley observed, "By providing partner schools with a data system as part of our First Scholars Network, we gain invaluable insight for the Center as we identify where and how we are adding value. We can then confidently communicate that to funders, current and potential partners, and any stakeholder invested in first-generation success."

4 **Provide technology tools to help partners implement an organization's program model and amplify talent.**
An inexorable shift is underway to employ more technology to engage students when, where, and how they want support, and to amplify the scarce resource of talent. In addition to data systems, several organizations are integrating technology into their Widespread Impact models to build the capacity of critical partner talent asynchronously and/or to provide tools to Widespread Impact partners to better engage with their students. For example, Saga provides both an online open education platform (Saga Coach) to train tutors asynchronously and a virtual platform (Saga Connect) for its partners to use in providing virtual tutoring. As Saga's Safran explained, "If you're driven by ROI, which is a driving force to scale, you have to address both cost and effectiveness — and technology is a tool to address both."

Big Picture has created its Imblaze platform to enable partners to replicate its management of experiential learning and internships. Beyond 12 provides a case management program roadmap for partners as well as an asynchronous, self-directed coaching app called MyCoach to students and a multichannel communications platform (text, email, etc.) — with utilization of these tracked in its data platform.

5 **Continually observe and ask for feedback about where partner organizations are getting stuck on program model implementation and let that guide the evolution of Widespread Impact investments.** Even with many or all of the above in place, it's unlikely that all partners will implement with perfect fidelity. It's important that Widespread Impact organizations take the time to reflect and look for trends across partners to inform continuous improvement of their model(s).

As Springboard's Gibes de Gac observed: "Widespread Impact requires balancing a focus on fidelity with a curiosity around variability. Greater variability is inevitable in a train-the-trainer model. This isn't necessarily a bad thing! It creates a series of 'natural experiments' from which you can expedite learning, harvest insights, and nuance your understanding of which program components drive the greatest impact. That, in turn, enables you to understand your core methodology and distinguish it from aspects of your program that can be customized. That way, more and more implementers can predictably drive impact while adapting the program model to their unique context."

> *"Widespread Impact requires balancing a focus on fidelity with a curiosity around variability. ... It creates a series of 'natural experiments' from which you can expedite learning, harvest insights, and nuance your understanding of which program components drive the greatest impact."*
>
> *– Alejandro Gibes de Gac, Springboard Collaborative*

OneGoal uses its own data dashboard to support a test-iterate orientation. Diaz-Andrade noted: "We review Key Results (KR) on a weekly basis, and on a quarterly basis, we pull up to ask ourselves, 'What did we learn based on this KR, and what does that mean for what we want to test/learn next quarter?' With respect to implementation, we have a KR that is about the extent to which our partner school site directors are entering coaching log data. This is an indicator that they are invested in the program. When we have seen this KR below our target, we can then do some root-cause analysis and pivot directly to address cases that may be about investment, technology issues, or something else."

Widespread Impact and Branding

One consideration for more intensive, deep Widespread Impact models is when and how organizations share their branding with partners. Widespread Impact models are a great way to build overall brand awareness. But depending on the performance of Widespread Impact partners, it can also distort or dilute an organization's Direct Impact brand. Some organizations elect to remain "private label" and not share branding. Others will create a separate brand (e.g., Valor's Powered by Compass model) but may still require significant demonstration of fidelity and strong student results to be certified and invited to adopt this brand (and may require ongoing strong outcomes to retain it).

Does an Organization With a Widespread Impact Model Need a Direct Impact Model?

No.

First, some organizations are explicitly founded as Widespread Impact organizations to propagate programming based on another organization's Direct Impact model or through an education intervention that has been heavily researched and is ready to go into the field. This includes organizations that spin out of a Direct Impact organization to exclusively focus on Widespread Impact, such as Fishtank Learning, which spun out of Match Education, a Boston-based charter school network. Another example is the BARR Center, which was founded by a high school counselor who initially developed the model to support her own students — and then, after 10 years of success in one high school, shifted to supporting schools across the country to implement it via a new, dedicated organization.

Second, it's also possible for an organization to begin in a Widespread Impact model and then expand into Direct Impact — and also Systemic Impact. An example of this is Beyond 12, which Bernadotte began as an entrepreneur-in-residence at NewSchools Venture Fund (NSVF) in 2008. Bernadotte and colleagues at NSVF identified a need to "make education organizations more effective and efficient by providing them with a product that allows them to track the postsecondary success of their students, and through that tracking equip organizations with the data and insights that allow them to more effectively provide student supports." Bernadotte built and scaled a platform that collected qualitative and quantitative student enrollment and success data from a range of sources.

Over time, some partner organizations came back to Bernadotte with an ask to directly provide coaching. She reflected: "We had some of our institutions telling us that we were providing them with great tools to highlight challenges, but they didn't have the bandwidth or capacity to provide students with the supports they needed — so they asked us to."

This sparked the creation of Beyond 12's direct student coaching model, which matches students with full-time near-peer coaches (recent college graduates) managed by Beyond 12 to guide students as they navigate their postsecondary success journeys.

Beyond 12's technology and data-focused roots were front and center as it designed this Direct Impact model. Its coaching is data- and analytics-driven, grounded in its Widespread Impact data system to track and support students. Additionally, Beyond 12 founded its direct coaching as a virtual model. As Bernadotte noted, "From the start, we were thinking about scale ... and our North Star was always through technology and always virtually."

Beyond 12 continues to see strong, mutual reinforcement between its Direct and Widespread Impact models. Its Direct Impact model continues to serve as a lab to develop insights into programming that can then be scaled through its Widespread Impact offering, which generates its own learnings, a data set to mine for insights, and a pipeline of partners back into its Direct Impact model.

Beyond 12 is also now exploring how to further expand into Systemic Impact. First, the act of observing, collecting, and sharing data about a system can sometimes lead that system to change itself. Bernadotte noted that "our data analytics on performance can provide insights to shift the mindsets in education systems we work with, helping them shape their own policies, practices, and resource flows to better respond to low-income, first-gen student needs."

> *"Our data analytics on performance can provide insights to shift the mindsets in education systems we work with, helping them shape their own policies, practices, and resource flows to better respond to low-income, first-gen student needs."*
>
> *– Alexandra Bernadotte, Beyond 12*

Second, Beyond 12 is exploring how it leverages the agency and relationships it builds with students. The organization's model builds the capacity of students to succeed through an executive coaching model, the foundation of which is the belief that students are "creative, resourceful, and whole," and are capable of finding the answers to their challenges with the right resources and guidance.[11] The organization is currently supporting 97,000 students on its coaching platform and plans to coach 1 million students annually by 2030. It's beginning to explore building community across these students, and how that community can lead students to self-organize as coalitions and campaigns driving collective impact within systems. Beyond 12 wants to activate students on its platform to support and mobilize their classmates to develop strategies and approaches for redesigning their campuses so they become more accessible, affordable, inclusive, and relevant to more students. Bernadotte shared: "We want to help students identify ways they can each create conditions to bring another 100 or 1,000 of their peers across that graduation stage with them. We want to be the Ella Baker of student advocacy — we won't tell students what to think and organize about, and we're not in the front of the movement. Rather, through coaching, we can provide the tools and build the skills to help them lead and activate their campus community. Our ultimate goal is to spark changemakers who will serve as catalysts for systemic change."

Third, some organizations that begin with a Direct Impact model eventually transition exclusively to a Widespread Impact or Systemic Impact model. For example, while Citizen Schools demonstrated and developed its model for its first three decades as a Direct Impact model, it's now evolving to focus exclusively on growth through the dual strategies of Widespread Impact and Systemic Impact and transitioning out of direct program management. Nadia K. Selby, Citizen Schools' vice president of program, noted, "We are in a position now where we want to move our work and its impact forward in a faster pace — because, quite frankly, when you're doing direct service, it moves at such a slower pace. And we've done [our Direct Impact model] for over 25 years, so it's time to branch out and teach more organizations how to do some of the magic we have learned and done ourselves."

Systemic Impact: Creating a Demand Strategy and Conditions for Scale

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

—David Flink, Founder of Eye to Eye

Most education is provided through social systems that determine what is and isn't required, allowed, funded, and measured.

A fundamental challenge of many education organizations is that they pursue a flawed theory of change grounded in a *Field of Dreams*, paraphrasing the film's iconic line: "If you build it, they will come." This theory presumes that if education entrepreneurs are righteous in their intent about addressing inequity and are getting promising results, then that's all it takes for others to broadly follow them into the field.[12]

However, one of the main flaws of this theory of change is that it presumes education systems are rational systems, when in fact they are political systems constructed of a complex and competing web of money, power, interests, and values that frequently disenfranchise the very communities they're meant to serve. If achieving scale means an education innovation requires disrupting the status quo of money, power, interest, and values, it's highly likely the system will push back because most systems are structured to preserve their status quo. Humans are political creatures, so our systems by nature will be political systems, and that cannot be ignored. Education entrepreneurs do not have to care about political systems for political systems to care about them.

As Springboard's Gibes de Gac noted, "We know that Widespread Impact will take us from the tens of thousands to the hundreds of thousands, but we measure the problem we're trying to solve in the millions, and you don't get to that without Systemic Impact."
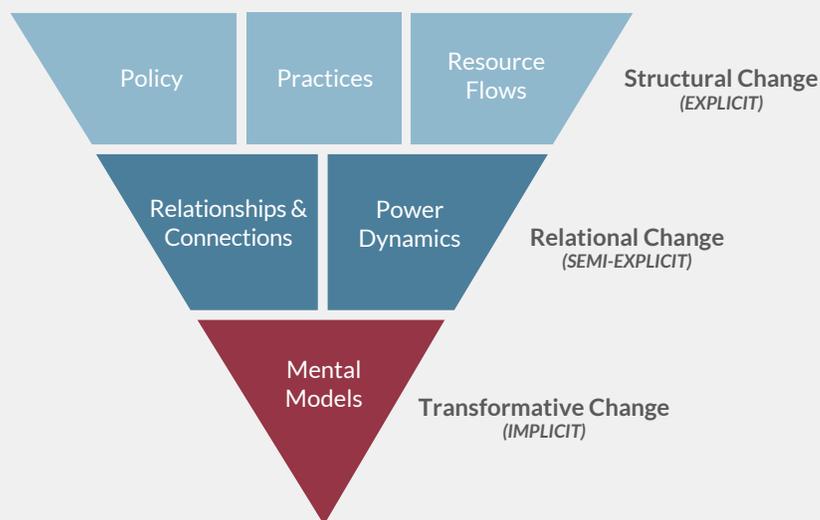
Similarly, uAspire's Piñero shared, "While our Direct and Widespread Impact work were and remain very important, it's the systems change work that is going to stop students from having to come back to us year after year for the same problems."

To reach systemwide scale, education organizations at some point must decide on a strategy for Systemic Impact, individually and in collaboration with others. FSG's framework on the six conditions of systems change outlines how an organization can seek to shift mindsets, relationships, and power as a means to shift policy, practice, and resource flows (Figure 7).[13]

> *"While our Direct and Widespread Impact work were and remain very important, it's the systems change work that is going to stop students from having to come back to us year after year for the same problems."*
>
> *– Jaclyn Piñero, uAspire*

Figure 7 Six Conditions of Systems Change

Policy | Practices | Resource Flows — **Structural Change** *(EXPLICIT)*

Relationships & Connections | Power Dynamics — **Relational Change** *(SEMI-EXPLICIT)*

Mental Models — **Transformative Change** *(IMPLICIT)*

Source: John Kania, Mark Kramer, and Peter Senge, "The Water of Systems Change," fsg.org, May 2018.

Others have written with significantly more experience and expertise on Systemic Impact, but we felt it was important to discuss as a crucial third peer to Direct Impact and Widespread Impact.[14] While Widespread Impact is different from Systemic impact in its strategic decisions and programs, Widespread Impact *does* help contribute to the Systemic Impact strategies of many organizations. As Citizen Schools' former CEO McCann observed about its community of Widespread Impact partners, "'You're not just our partners, you're not just recipients, you're influencers in our bid for systemic change.' So they become the ones who come with us on our Hill day. They're the ones who are advocating to their local congressional leaders."

Questions to Consider in Designing Systemic Impact Strategies: Through in-depth interviews with a range of education entrepreneurs, we found that many organizations developing Systemic Impact strategies work iteratively through the following questions (Figure 8).

Figure 8 > Questions to Consider in Designing Systemic Impact Strategies

META QUESTION:

What role and leadership do communities most impacted by education systems have in setting the agenda for changing those systems?

1. **Which systems** does an organization seek to influence?
2. **What changes** does an organization want to achieve for a given system? What is the agenda?
3. **How are those changes achieved**, and who has to be influenced to achieve them?
4. **Who else needs to be involved and in what role** for changes in a system to be created and sustained?

Embedded in and across each of these questions is a meta-question that must be considered: **What role and leadership do communities most impacted by education systems have in setting the agenda for changing those systems?** Organizations pursuing systems change must acknowledge and address the reality that often the agenda for education change is set by and reflects the values of people with privilege in positions of power. These efforts often marginalize and alienate the very communities well-intentioned outsiders seek to serve by imposing an agenda on them, essentially disenfranchising these communities in the same way existing underperforming education systems often do. The first step is to ask this question directly to communities and let their answers and corresponding agenda then guide the answers to these next four questions.[15]

- **Question 1: Which systems does an organization seek to influence?** Organizations can define systems at different levels. For example, in higher education, a nonprofit may seek to achieve systemic change at an individual college or university campus. It might seek to achieve change at a multi-campus system, a statewide public college or university, at all higher education institutions within a state, or at a national level — and these are not mutually exclusive.

  Community voice becomes essential in defining systems, for the simple reason that communities may experience and define systems differently than outsiders. In education reform, we have the privilege of creating our own siloed definition of systems: school systems. But that isn't how communities experience systems. They experience an ecosystem of multiple — often failing and oppressive — systems that overlap and impact each other. If we want to be in service of social justice, then we also have to respond to that reality and a community's agenda outside of our narrow definition of education, be it safety, food security, housing, healthcare, immigration rights and protections, economic opportunity, and/or taking on systemic racism and oppression in our social policies and civic structures.[16]

- **Question 2: What changes does an organization want to achieve for a given system? What is the agenda?**
  What has to shift in order to allow, encourage, or even mandate that an organization's education model scales broadly across a system? Is it an elimination of an existing policy, a change in existing policy, or a new policy? Is it about creating sufficient funding and/or effective, efficient, and equitable distribution of that funding? Is it about changes to practice that ensure that systems best support the stakeholders they were meant to serve (e.g., simplifying the FAFSA [Free Application for Federal Student Aid] form, or requiring it as a condition of high school graduation)?

  Again, it's crucial that organizations engage with local community stakeholders as authentic partners in crafting the "what." Without respecting a community's agency in determining the direction of change, education leaders cannot expect communities to exercise their power in support of a change imposed on them, and organizations risk trying to advance a change that does not truly meet the needs of the community they purport to serve.[17]

- **Question 3: How are those changes achieved, and who needs to be influenced to achieve them?** First, organizations must understand who has the authority to create change in a system. Second, organizations and the communities they serve must determine how to reach and influence those in authority. Education organizations have a broad range of levers to pull in pursuing Systemic Impact. As shared in Widespread Impact, Systemic Impact also so often begins with shifting mindsets so that stakeholders know first what's possible and then believe they have a pathway to making the possible a reality. Systems change can be as much about the power of persuasion as the power of pressure. Common levers for change include but are not limited to:

  > **Research and publishing to raise awareness**, which may also leverage content created for the free resources provided as part of some Widespread Impact models. As Saga's Gutierrez noted: "The power of thought leadership is so important as we think about having an influence on policy change ... if you have key policymakers and influencers reading [your content], it strengthens the credibility of your work and builds momentum. And when the philanthropic community sees that, it helps us raise money to do this work."

  This also becomes crucial in engaging with communities and their parents and students in pursuing systemic change. It can be difficult for a community to try to solve problems or seize opportunities they don't know they have. Springboard's Gibes de Gac observed: "In order to bring our vision for Systemic Impact to life, we need a groundswell of families and teachers demanding change. And the biggest impasse is perhaps the one you least expect: data transparency. Parents may not realize their children are falling behind, which makes it exceedingly difficult for them to advocate for their kids."

  > **Social media and online communities** to also raise awareness and guide individual or collective action by stakeholders, including not only Widespread Impact partners but also students, parents, teachers, and other community stakeholders.

> **Active engagement with policymakers**, which can include briefing, testifying, and sharing an organization's experience and expertise. Organizations that have strong evidence from their Direct Impact and/or Widespread Impact models bring credibility to the table for policymakers who value evidence-based practices to shape public policy. For example, Saga connected with more than two dozen Capitol Hill offices in Washington, D.C.; held data briefings with members of Congress and the U.S. Department of Education; and provided expert testimony at the state level in Colorado to support a tutoring bill that subsequently became law.[18] Gutierrez noted that "establishing strong credibility gave us a seat at the table."

> **Participating or organizing coalitions** of like-minded organizations to launch a systems change advocacy campaign and build an infrastructure of collective power.

> **Movement-building**, supporting constituencies — community, parents, students, and/or educators — to organize and build their innate collective power to drive change (and to be the ones defining the change being pursued).

> **Building a 501(c)(4) arm and engaging in electoral and more extensive legislative lobbying and activism.**

In considering this range of levers, organizations also must think about what assets they possess or can develop, such as data in the form of quantitative information and qualitative stories; relationships with those in formal authority and political/social capital; and the infrastructure of community power aligned with their agenda.

- **Question 4: Who else needs to be involved and in what role for changes in a system to be created and sustained?** Organizations must consider potential partners and their roles for a change in a system to succeed and be sustained. Organizations may turn to like-minded nonprofits or schools, or their Widespread Impact partners, to join them in this work, and/or may join broader coalitions across the field. Again (because it warrants emphasis), organizations must engage with students, parents, and communities whose roles should be not only to participate in action but also to decide on which systems to influence and a shared agenda for change.
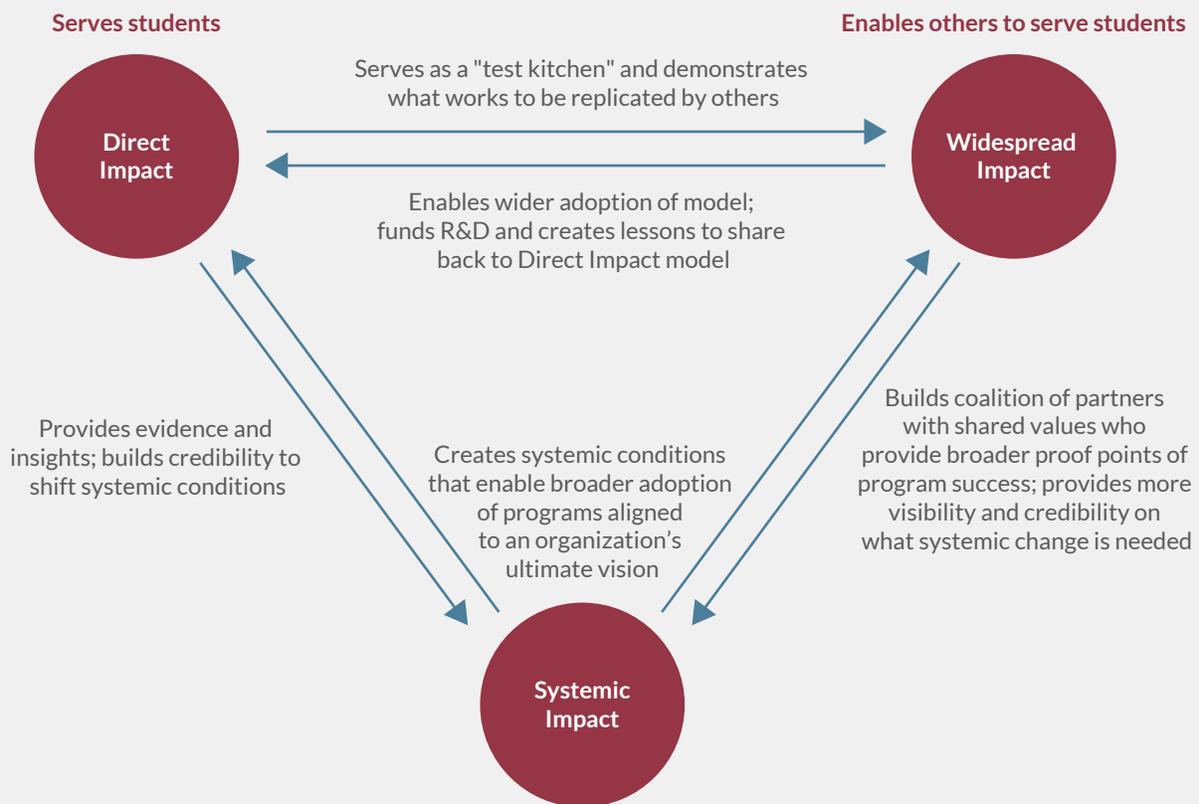
Last, Systemic Impact is not a marathon nor a sprint but rather a commitment to walk 10,000 steps every day on a cyclical path. The wheel of systems change is always turning. No decision is permanent. Individuals in authority can change, as can their positions. Policy changes within larger systems (e.g., the federal government) may impact the policies of smaller systems (e.g., state legislatures). Those who do not agree with a specific systems change agenda will continue to work to advance their competing agenda. Changes in larger societal conditions (e.g., a recession or pandemic) can upend existing systems. Education entrepreneurs will continually create new or refine existing innovations, and community needs will change and evolve, leading to new change agendas to pursue.

How Impact Strategies Are Mutually Reinforcing and Can Be Balanced

Each impact strategy is individually powerful, but organizations also reflected on their mutually reinforcing power when pursued in combination. We introduced this playbook with the following graphic that illustrates this power (Figure 1 *Repeated*).

Reinforcing Benefits of Direct, Widespread, and Systemic Impact Strategies

Serves students

Enables others to serve students

Serves as a "test kitchen" and demonstrates what works to be replicated by others

Direct Impact

Widespread Impact

Enables wider adoption of model; funds R&D and creates lessons to share back to Direct Impact model

Provides evidence and insights; builds credibility to shift systemic conditions

Creates systemic conditions that enable broader adoption of programs aligned to an organization's ultimate vision

Builds coalition of partners with shared values who provide broader proof points of program success; provides more visibility and credibility on what systemic change is needed

Systemic Impact

Connelly explained how OneGoal thinks about all three working in concert: "We've started to actually codify what we think about a reimagined college advising world: What is true at the student level, school level, and system level? And what could OneGoal's role in each of those levers be? We have this direct program that ensures that students are receiving high-quality advising experiences within the school day, and we feel like that's an incredible and a critical component. We believe at the school level that educators, counselors, and school leaders need to be

trained and equipped with the knowledge, skills, mindsets, and beliefs that ultimately create the kind of additional conditions for advising to happen. And then we believe at the system level (state level), there needs to be consistent prioritization and funding for this work for all of this to succeed at scale."

As organizations look to move beyond Direct Impact into Widespread and Systemic Impact, they're suddenly faced with bigger questions around prioritizing time, energy, and resources between and across the three strategies. Leaders can consider the following while deciding how to balance across these impact strategies:

1 **Intended Impact and Theory of Action versus Theory of Change**

2 **Organizational Capability**

3 **Financial Sustainability**

1 **How the Three Impact Strategies Contribute to an Organization's Intended Impact and Theory of Action versus Theory of Change**

Distinguishing between an organization's Intended Impact and Theory of Action versus its Theory of Change is an important forcing function to drive clarity around what an organization is and is not holding itself accountable for achieving (Figure 9).

Figure 9 ❯ Intended Impact, Theory of Action, Theory of Change, and Ultimate Vision

Intended Impact	Theory of Action	Theory of Change	Ultimate Vision

• Articulates three things:
  1. Who are the **beneficiaries** being served (their attributes and where they are)?
  2. What specific, measurable **outcomes with targets** are being achieved with them?
  3. Over what **time frame**?
	• Articulates the specific **actions/ strategies an organization takes** to address these challenges and/or opportunities to achieve this intended impact.
	• **Can be a series of 'if-then' statements**, and actions can be taken in sequence or in parallel.
		• The **larger set of population-level change in** *conditions* an organization wants to see achieved and that a successfully executed Intended Impact/Theory of Action contributes to.
		• Includes the **actions that other stakeholders have to take** to achieve the ultimate vision.
			• **Ultimate population-level change in** *outcomes* an organization seeks to achieve through its Intended Impact/Theory of Action contribution and success in achieving the Theory of Change.

What an organization holds itself accountable for achieving
(and expects others to also hold it accountable for achieving)

Broader population-level impact an organization contributes to, and can even measure, but is not holding itself directly accountable for achieving

Intended Impact is an articulation of who an organization serves, what outcomes it wants to help them achieve, and over what time frame (typically three to five years). **Theory of Action** is an articulation of an organization's programmatic actions and strategies that will achieve this Intended Impact. Together, Intended Impact and Theory of Action are what an organization will hold itself accountable for achieving in the near-to-medium term.

In contrast, a **Theory of Change** is the ultimate population-level change in conditions an organization wants to see created that are necessary to achieve its **Ultimate Vision** of population-level outcomes. A Theory of Change and Ultimate Vision are the larger change that an organization's success contributes to, and that it desires, but that it is not holding itself accountable for achieving.

Clearly articulating these concepts (using these or other terms) can be a powerful exercise for organizations. They can then use that clarity to decide what they will and will not do (and therefore what they should and should not be held accountable for), and to tell a clear, compelling story in both an internal playbook for their teams and as a pitch book for external stakeholders, including funders.

Organizations employing all three impact strategies (Direct, Widespread, and Systemic) can more ambitiously expand their Theory of Action closer to their Theory of Change (moving the line in Figure 9 to the right and closer to an organization's Ultimate Vision).

By expanding into Widespread Impact, an organization allows more partner organizations and communities to adapt, adopt, and demonstrate how an organization's education innovation can drive impact in a range of contexts.

Wells from ELP summed it up nicely: "We are a small technical service provider that has, like many others, an ambitious mission statement that's thinking about every child in America, especially those who are least served right now. And I'm painfully aware, even though I'm proud of how we've grown, what a drop in the bucket we are. We've been thinking a lot about how our theory of action can be better scaled … which is what led us to our Widespread Impact work."

Expanding into Systemic Impact allows an organization to explicitly take on creating the population-level conditions required for systems to fully adopt an education innovation. Direct Impact and Widespread Impact models contribute to Systemic Impact by providing evidence of what works at scale across a broad and diverse set of communities, by revealing insights into the root cause of obstacles within systems that need to change for an innovation to truly scale and flourish, and by building credibility and a broader coalition of stakeholders who support the same ultimate vision for change and can organize to exercise their power to achieve it.

And unless an organization's ultimate Theory of Change is exclusively achieved through changes in individual behavior (e.g., individual students, parents, or teachers adopting an education resource), or others are leading Systemic Impact on an organization's behalf, then it inevitably must take on Systemic Impact to achieve its ultimate vision. Wells at ELP acknowledged, "Right now, we do a lot of our work in spite of and around existing policies. We look for opportunities to influence systems because we know that if we have a voice at the table, if we're involved in those conversations, there's a chance that we can help shift conditions for our school-based work to be even more effective and sustainable."

Playing in Systemic Impact may also be a requirement to sustain Widespread Impact. Safran at Saga noted, "the Widespread Impact work we're doing might not survive after three years unless we change systems to sustain the right policies and funding — it's necessary work."

> *"Right now, we do a lot of our work in spite of and around existing policies. We look for opportunities to influence systems because we know that if we have a voice at the table, if we're involved in those conversations, there's a chance that we can help shift conditions for our school-based work to be even more effective and sustainable."*
>
> *– Justin Wells,*
> *Envision Learning Partners*

❷ Organizational Capability to Effectively Expand into and Execute All Three Models of Impact

Many nonprofit organizations are challenged by having ambitions that their internal capacity cannot meet. Organizations expanding into multiple impact strategies face this challenge at multiple levels. However, while growing pains may be unavoidable, they are addressable:

- **Begin by acknowledging that the mindsets and capacity to execute these strategies can be very different.** Cruz from Citizen Schools noted that, "There's a strong cultural and organizational transformation that needs to happen from focusing on direct work to capacity-building work." Leading execution of a direct program is not the same as codifying, training, or consulting to others about how to implement. Some staff work best with clear control over directly running a program versus more limited control and greater emphasis on influence in Widespread Impact models. Systemic Impact requires being unapologetic about power and understanding who has it, how to harness it, and how to use it. Direct Impact, Widespread Impact, and Systemic Impact also work on very different timelines and, in the case of Systemic Impact, can be less linear and more cyclical — and some people and organizations have different appetites for that.

> *"There's a strong cultural and organizational transformation that needs to happen from focusing on direct work to capacity-building work."*
>
> *– Oscar Cruz,*
> *Citizen Schools*

- **An organization must provide its team a common "why" with context and clarity on what it's prioritizing within and across these impact strategies.** When expanding from Direct Impact into Widespread Impact, organizations often develop internal confusion and tension around what truly constitutes a priority. Direct Impact teams who were previously front and center might feel devalued as Widespread Impact models suddenly take root and have the potential to grow rapidly. This can become a bigger strain on an organization if staff are pulled into working across multiple impact strategies beyond either their skill set or bandwidth, or staff transition from one strategy and leave another short-handed.

  Saga has grappled with this tension over time, and Safran has found that holding transparent town hall-style meetings helped give the team context and mitigate concerns by reiterating this message: "We will always have a Direct Impact side of the house. It is our crown jewel, with the highest fidelity and deepest ongoing impact on students, and the place where we can test modifications that can improve tutoring further." At the same time, Saga leadership has had to be clear that its Widespread Impact strategy is important and needs to be embraced, even within its Direct Impact team. Saga's Gutierrez shared, "Grounding people in the greater 'why' is starting to become a great priority for us as we expand into a more ambitious set of directions and impact." He continued: "A lot of our team is focused on directly implementing our model at the highest level of fidelity, putting our best foot forward. Offering supports that reach more youth but with less fidelity is difficult for some to accept. But we have to pursue more models to scale our evidence-based program, and the trade-off between Direct Impact and Widespread Impact has led to some really crucial conversations internally."

- **Expanding from one to multiple strategies is not a zero-sum game of resources.** Valor's Dickson noted how Widespread Impact can be positioned as a complement to and not a detraction nor distraction from Direct Impact efforts: "Compass Camp (Valor's Widespread Impact model) helped build capacity across our organization. The added capacity that was brought in to build out our Widespread Impact allows us to raise the bar for our Direct Impact work in our schools — learning happened in both directions."

> *"The added capacity that was brought in to build out our Widespread Impact allows us to raise the bar for our Direct Impact work in our schools — learning happened in both directions."*
>
> *– Todd Dickson,*
> *Valor Collegiate Academies*

- **Building out separate teams is valuable, but it's also important that they share DNA.** Bauer White at InsideTrack explained: "We have changed our organizational approach over the years. Just a few years ago, we had teams that were doing everything — some direct coaching, some consulting, and some training. But as we grew, we realized that this wasn't really sustainable. So now we have our coaches report into managers who can support the quality and impact of our direct coaching model. And we have our strategic partnership directors who deliver on our capacity-building model and build strong partner relationships. And that shift allowed us to really focus our resources and make sure that both teams were getting the attention they deserved."

Sometimes this means moving people across teams. Saga's Safran explained, "We moved some people from our Direct Impact tutoring program into our emerging Widespread Impact strategies because we needed the DNA of our original program to ensure the new program was grounded in what worked."

- **Executive oversight is critical to keeping each impact strategy individually successful yet also collectively aligned.** uAspire's Piñero explained: "If you're an organization that is looking to have Direct, Widespread, and Systemic Impact, then absolutely there has to be a framework that will solve for the silos in communication … it's our chief impact officer's wholescale responsibility to oversee the interaction of our three impact models, how they build upon, learn from, and grow from each other. And she has [direct reports] in place who are strong leaders so she can stay at that higher level and see the intricacies across models." InsideTrack's Bauer White concurred, noting that while InsideTrack has built separate teams, "It's still important for teams to know what the others are doing so those leaders have to have a close relationship."

- **Individual organizations also do not have to take on everything themselves — they can work in partnerships and coalitions.** While some organizations expand into all three strategies, others deliberately coordinate with partners, either in place of or as a complement to their work. Cruz of Citizen Schools observed: "We don't need to do everything. That's a nonprofit issue — we want to tackle all these different avenues alone, but actually we don't need to. If you do this, and this other organization does that, together we're able to meet the needs of students and families within this community."

- **Finally, an organization may also choose to pursue a merger or acquisition pathway** to bring in-house the capabilities required to expand into Widespread Impact or Systemic Impact. For example, Saga acquired Woot Math (an education technology company) in 2020 when it realized technology was going to be a crucial enabler to rapidly scaling its Widespread Impact models.

③ Financial Sustainability

As organizations scale their impact across multiple strategies, they must be cognizant of funding these growth ambitions. uAspire's Piñero shared how its team balances its mission-driven approach with the everyday management and operation of the organization's business side: "How much to put where, who is going to pay for it, market demand … it comes back to the breadth-versus-depth question — we will be able to give you more when you pay for it … it's just a fact of life that revenue has to be part of the strategic conversation. You have to have a team that can have those conversations and understand the role that revenue needs to play in making choices."

Some organizations refine their Direct Impact model and its costs, making trade-offs on ROI to reach a price point stakeholders can fund without philanthropic support (e.g., being fully funded by federal Title I).

Other organizations explicitly expand from Direct Impact to Widespread Impact as a strategy for not only scale but also for sustainability. One organization shared it was transitioning out of its Direct Impact model because "it was really clear to us after many, many years that our Direct Impact program was not a financially scalable model."

And many Widespread Impact models are designed to have an earned income component from partners, including those designed to be revenue-generating over time and at scale. Saga's Safran hypothesized that, for some models, "Widespread Impact can support Direct Impact with revenue, and Direct Impact can support Widespread with reputation."

Education philanthropy frequently serves as both innovation capital for new ventures and growth capital for scaling existing ones with strong evidence. Some funders focus on Direct Impact models based on their own strategies for creating impact, based on the age/stage of an education program they seek to fund, and/or based on the level of evidence they require for funding. Others are open to funding the creation and scaling of Widespread Impact models, with different funders sometimes prioritizing breadth or depth.

Education philanthropy is at times reluctant to fund work around Systemic Impact, even as many intend their innovation or growth capital to ultimately be amplified and replaced by spending from education systems.

From an education practitioner perspective, a crucial reason for pursuing Systemic Impact is the pragmatic calculus of who's funding education. While philanthropy provided an impressive estimated $7 billion in K-12 funding in 2017, this equaled less than 1% of the $736 billion spent by federal, state, and local governments on public K-12 in the 2016-17 school year.[19]

For an education program to achieve true scale and sustainability, changes must be made at the systems level. As one education leader observed, "Systemic Impact can be the ultimate business development."

Conclusion

Social change is daunting. We fully acknowledge that some organizations will focus on just one or a subset of these three impact strategies, and in doing so will continue to create profound value. However, for some organizations, expanding to pursue a combination of Direct, Widespread, and Systemic Impact is a requirement to achieve their vision. As Springboard's Gibes de Gac observed, "If you want to solve the problem at the scale it exists, then you have no choice but to do all three, and I find that motivating even as it gets harder the bigger and more complex you get."

ELP's Wells, in reflecting on expanding into these three impact strategies for his organization, shared: "That's what I love about this work — I found a way for this technical service provider to be engaged in a deeply philosophical conversation that this country is poised for right now: What are our schools for? … Our work across all three of these impact strategies is a fight to expand the notion of what student success is about, not only to raise the bar, but also to give students more ways to reach it."

> *"If you want to solve the problem at the scale it exists, then you have no choice but to do all three [impact strategies], and I find that motivating even as it gets harder the bigger and more complex you get."*
> *– Alejandro Gibes de Gac, Springboard Collaborative*

This work is not easy. We are deeply inspired by the ambitions and accomplishments of the education entrepreneurs featured in this paper and their peers across the country who are working tirelessly across these three impact strategies to improve life outcomes for students.

Appendix: Measuring Widespread Impact

Why is measurement so important? The purpose of all work in education is in service of students so they can fulfill their potential, and measurement is a means for organizations to manage and maximize their contribution to that. Specifically, measurement is valuable to the following stakeholders for a range of different reasons (Figure A1):

Figure A1   Reasons Stakeholders Value Measurement

Organizations Providing Widespread Impact	Widespread Impact Partners	Funders	Policymakers
• Planning, setting priorities, and properly resourcing those priorities — in strategic planning and on an ongoing basis. • Managing and maximizing execution. • Learning. • Attracting allies, partners, and resources.	• Managing expectations of commitment. • Managing and maximizing execution. • Learning. • Making the case for funding/prioritization internally and attracting external resources.	• Understanding impact. • Learning alongside grantees. • Unlocking more funding. • Better structuring that funding (time-frame, level of restriction).	• Understanding what impact is possible. • Understanding how that impact can be achieved/what program models should be supported. • Equipping them with what they need to make the case on policy.

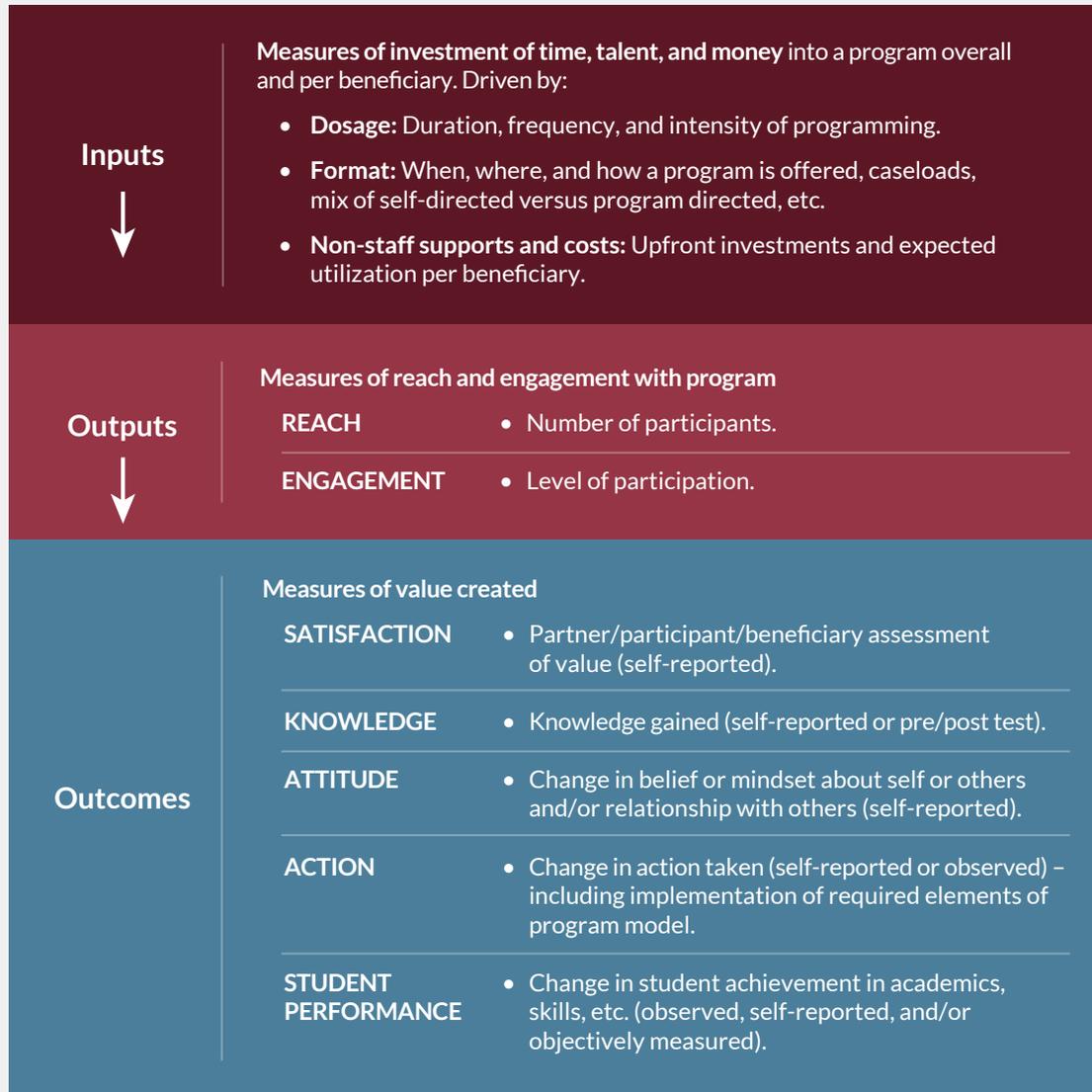Measurement is a challenge for many organizations.

Across all three impact strategies, collecting and analyzing data takes time, energy, resources, and expertise — all things that are usually in limited supply.

It can also be hard for some organizations to isolate and demonstrate what impact they are responsible for. Some outcomes are completely influenced by a single organization's programming, while in other complex situations — like within a school building — an organization may be only one of many actors serving the same student population.

In addition, there are a complex range of measures organizations need to consider across inputs, outputs, and outcomes. These three categories of measures are important, but they are also different, and some organizations conflate outputs and outcomes (Figure A2).

Figure A2 > Categories and Types of Measurement

Inputs ↓	**Measures of investment of time, talent, and money** into a program overall and per beneficiary. Driven by: • **Dosage:** Duration, frequency, and intensity of programming. • **Format:** When, where, and how a program is offered, caseloads, mix of self-directed versus program directed, etc. • **Non-staff supports and costs:** Upfront investments and expected utilization per beneficiary.
Outputs ↓	**Measures of reach and engagement with program** REACH — • Number of participants. ENGAGEMENT — • Level of participation.
Outcomes	**Measures of value created** SATISFACTION — • Partner/participant/beneficiary assessment of value (self-reported). KNOWLEDGE — • Knowledge gained (self-reported or pre/post test). ATTITUDE — • Change in belief or mindset about self or others and/or relationship with others (self-reported). ACTION — • Change in action taken (self-reported or observed) – including implementation of required elements of program model. STUDENT PERFORMANCE — • Change in student achievement in academics, skills, etc. (observed, self-reported, and/or objectively measured).

What can be measured in Widespread Impact varies based on the breadth-to-depth continuum. We have observed the following trends across each Widespread Impact model regarding what outputs and outcomes can be measured. Note: Organizations providing a data system/backbone as part of their model — either a la carte or as part of a consulting or cohort model — are in a much stronger position to assess actions (e.g., is an organization implementing a model) and student outcomes (Figure A3).

Figure A3 — What Can Be Measured by Widespread Impact Model

	Free Resources (tools, resources, research)	Convenings	Fee-based Resources	Trainings	Consulting	Cohort Capacity-building
INPUTS	X	X	X	X	X	X
REACH	X	X	X	X	X	X
ENGAGEMENT	X	X	X	X	X	X
SATISFACTION	X	X	X	X	X	X
KNOWLEDGE				X	X	X
ATTITUDE				X	X	X
ACTION					X	X
STUDENT PERFORMANCE			If resource is a data platform with data sharing agreement		If part of agreement	If part of agreement

Some organizations incorporate their own measurement of student performance into their Widespread Impact models and find that measurement incredibly valuable. For example, Springboard's Gibes de Gac noted: "Student assessment is built into our FELA (Family Engagement Learning Accelerator) method – partners first measure a baseline and then over time measure progress against that baseline. The FELA method doesn't work if you're not working toward a growth goal, so all our partners are measuring literacy growth in one way or another."

However, as with many Direct Impact models, Widespread Impact models can be even more challenged in attributing their impact on student performance. uAspire's Piñero acknowledged, "We track persistence and enrollment, which are two very important things to track, and financial aid has an impact on both. But it's not the only thing that impacts enrollment and persistence."

For some more intensive, depth-centric Widespread Impact models, measuring actions around implementation and fidelity become very important. Just as organizations closely monitor the execution of their own model, organizations with a heavier emphasis on fidelity of implementation will in turn want to measure the implementation of their model by their Widespread Impact partners, acknowledging that they measure many of the same things in their Direct Impact model but have less control over what a partner organization does and where it can and cannot set performance targets for partners.

Again, organizations providing a data backbone to their partners are in a much better position for their partners to measure implementation and share it back.

Where possible, it also becomes valuable to link measures of implementation to measures of student performance to understand if the desired student outcomes are being achieved, how it varies based on different student subgroups (and if it points to different student profiles to be provided with different program models), and/or how it varies based on different levels of implementation (Figure A4).

Figure A4 | **Measuring Implementation and Fidelity of Widespread Impact Partners**

Measuring a Widespread Impact Partner's Actions — Implementation and Fidelity

Design Elements	Target Implementation (if applicable)	Actual Implementation (by subgroup)
Target Beneficiaries	?	?
What is Measured by Partners	?	?
Curriculum/Content/Program	?	?
Dosage	?	?
Format	?	?
Mix of Talent/Technology	?	?
Source/Support for Talent	?	?
Ratio	?	?
Caseload	?	?
Integration with School/Partner	?	?

What student outcomes are being achieved and how do they differ by different subgroups of beneficiaries and/or by different levels of implementation?

Inputs

Outputs — REACH, ENGAGEMENT

Outcomes — SATISFACTION, KNOWLEDGE, ATTITUDE, ACTION, STUDENT PERFORMANCE

Measuring Financial Sustainability and Return on Investment

Widespread Impact organizations, their Widespread Impact partners, and their funders will all want to understand the financial implications of a Widespread Impact model (Figure A5). Widespread Impact organizations should track the cost to deliver their Widespread Impact models — both costs to the organization and costs to its partners. Over time, as these models grow and evolve, stakeholders will want to understand what can drive financial sustainability. In addition, as organizations begin to track measures of outputs and outcomes, stakeholders can begin to understand what can drive cost efficiency and, ultimately, ROI.

Figure A5 > Measuring Financial Performance

Inputs

What is the cost to the Widespread Impact organization to deliver this model to their partners? What is the financial sustainability of this model over time as it scales?

Outputs

What is the cost per reach and engagement with a partner?

Outcomes

*For Depth Widespread Impact models where **implementation** is measured*

What is the cost per student to a Widespread Impact partner to implement? How does it vary by subgroup? Does it become **cheaper** over time?

*For Depth Widespread Impact models where **student outcomes** are measured*

What is the cost per student outcome? How does it very by subgroup? Does it become **more effective** over time? What is its **ROI**?

Measurement is not the same as target setting, but both are important. A target is not the same as a measure of inputs, outputs, or outcomes. Rather, a target is the specific performance an organization wants to achieve for any of these types of measures in a specific time period.

Setting targets is both an art and a science. Targets should be ambitious yet achievable — not a lofty aspiration. Targets should inform an organization's path forward (e.g., timelines and allocation of resources).

In Direct Impact, because an organization is running its own program, target-setting is at its discretion.

Target-setting is more complicated in Widespread Impact models. An organization can set targets for itself around outputs (e.g., reach and engagement) and outcomes (e.g., satisfaction in its breadth models). For models closer to the depth side of the continuum, and as the outcomes start to focus on actions and student performance, potential targets become part of the social contract between an organization and its Widespread Impact partners. Some Widespread Impact models may set explicit targets, while others may continue with rigorous measurement but don't choose to set targets for partner performance.

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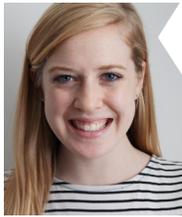
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About Bellwether Education Partners

Bellwether Education Partners is a national nonprofit focused on dramatically changing education and life outcomes for underserved children. We do this by helping education organizations accelerate their impact and by working to improve policy and practice.

Bellwether envisions a world in which race, ethnicity, and income no longer predict opportunities for students, and the American education system affords all individuals the ability to determine their own path and lead a productive and fulfilling life.

About New Profit

New Profit is a venture philanthropy organization that backs social entrepreneurs who are advancing equity and opportunity in America. New Profit exists to build a bridge between these leaders and a community of philanthropists who are committed to catalyzing their impact. New Profit provides unrestricted grants and strategic support to a portfolio of organizations led by visionary social entrepreneurs to increase their impact, scale, and sustainability. It also partners with social entrepreneurs and other cross-sector leaders to shift how government and philanthropy pursue social change to ensure that all people can thrive. Since its founding in 1998, New Profit has invested over $350 million in 130+ organizations and, through the America Forward Coalition's collective advocacy efforts, has unlocked over $1.7 billion in government funding for social innovation.