METHODOLOGY TO EXTEND IMPACT

SPRING IMPACT

JEWISH TEEN Education & Engagement FUNDER COLLABORATIVE

INTRODUCTION

Through the work of the Jewish Teen Education & Engagement Funder Collaborative many communities and organizations have seeded, nurtured, and grown programs that reach new and diverse teens and positively impact their Jewish learning and personal growth. New research and insights have led to a richer understanding of modern teenagers, spurring inspiring engagement methodologies which reflect this understanding. Many of these new models of engagement—and other approaches emerging from new programs in the engagement space—have immense potential to be adapted by other communities.

While scaling to other communities is a captivating idea, actually doing so requires a great deal of hard work and attention to operational detail. Too often organizations jump into scaling impact without carefully thinking through the upfront decisions necessary to effectively carry out their ambitions. Spring Impact—a nonprofit that focuses purely on scaling social innovations—developed a systematic approach that helps programs effectively and sustainably extend their impact to new communities. Spring Impact and the Jewish Teen Education & Engagement Funder Collaborative have developed a custom toolkit to support organizations interested in using this approach and process as they scale to new communities.

This toolkit is for you if:

- You are a Jewish organization or program
- You are motivated by the vision of your methodology, program, or principles positively impacting other communities
- You have evidence of demand for your methodology, program, or principles
- You are able to track and articulate the impact of your methodology, program, or principles
- You have at least one team member who can dedicate time and capacity to leading efforts to extend impact to new communities

ABOUT THE JEWISH TEEN EDUCATION & ENGAGEMENT FUNDER COLLABORATIVE

The Jewish Teen Education & Engagement Funder Collaborative is an innovative philanthropic experiment. In an unprecedented collaboration, national and local funders work together to develop, nurture and scale new approaches to teen engagement. Informed by up-to-the-minute research and data, and drawing on the collective strength of local organizations, multi-faceted initiatives in ten communities across the country aim to reverse the trend of teens opting out of Jewish life in their high school years.

ABOUT SPRING IMPACT

Spring Impact is a nonprofit that focuses purely on scaling social innovations. Spring Impact was born out of the frustration of seeing social organizations constantly reinventing the wheel and wasting scarce resources. Using a combination of successful and tested commercial and social principles, while drawing on extensive practical expertise, Spring Impact helps organizations identify, design and implement the right strategy and business model for scale.

OVERVIEW

This document is intended to be used as a tool to plan and prepare for scaling impactful solutions within the Jewish community. It is broken into three core sections:

- First, **to learn** about the potential models you can pursue;
- Second, **to choose** the model that is best suited to your goals;
- Third, **to prepare** the necessary elements for sustainable and effective scaling

1 LEARNING ABOUT PATHS TO SCALE

This section will introduce you to the main directions and models you can pursue to scale your impact.

- 1.1 OVERVIEW TO SCALING IMPACT
- 1.2 MODELS FOR SCALING IMPACT

2 CHOOSING A PATH AND ASSESSING READINESS

This section will guide you in decision making to help determine which scale strategy best fits your organization and goals.

- 2.1 SETTING YOUR GOAL
- 2.2 ASSESSING COMMUNITY DEMAND AND FUNDER APPETITE
- 2.3 SPECIFYING YOUR MODEL AND ROLE

3 PREPARING FOR SCALE

This section provides tactical guidance about the central components one must consider in order to successfully extend impact into other communities.

- 3.1 CAPTURING CORE COMPONENTS
- 3.2 DETERMINING ROLES AND RESPONSIBILITIES
- 3.3 DEFINING ADAPTER PROFILE
- 3.4 DETERMINING START-UP AND ONGOING SUPPORT
- 3.5 ESTIMATING COSTS AND FUNDING STRUCTURE
- 3.6 DEFINING DATA NEEDS
- 3.7 DESIGNING YOUR MODEL
- 3.8 CREATING A TOOLKIT

OVERVIEW TO SCALING IMPACT

Scale is a hot topic in the nonprofit sector, yet scaling in way that preserves quality and sustainability can be difficult. Too often organizations and funders jump into scaling impact without carefully thinking through the upfront decisions necessary to effectively carry out their ambitions.

It's worth recognizing that there are a wide range of indirect and direct ways to scale impact. Indirect methods of scaling impact increase impact by influencing others, such as influencing public policy around an issue or building a social movement. Direct methods of scaling increase impact by providing a service or a product directly to the end recipient, such as increasing the number of those served or increasing the quality of a provided service.

A common way of indirectly scaling in the Jewish community is through field building, when an organization works independently or in collaboration with other similar-minded organizations to create social change for the Jewish community. 'Building the field' generally involves creating a collective identity across a visible membership base that pursues a shared common cause or desired change to the status quo. It also typically involves collective actions and activities for the membership base.

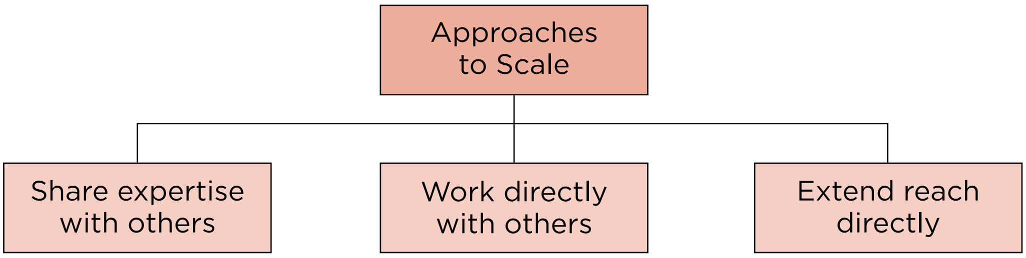
Direct methods of scaling impact include increasing the quality of the programming you're already delivering or helping the solution reach more people in more places. Scaling strategies are not mutually exclusive and often interlink—in fact, many organizations employ different strategies simultaneously.

This toolkit is based on Spring Impact's experience with a specific method of scale called "replication". Replication is defined as taking your organization, program or a set of core principles to other geographic areas, or empowering others to do so. Within the context of Jewish community organizations, this is best articulated as enabling others to take on and adapt a program, methodology, or principles in their own community. Throughout this toolkit, we will frequently use the term "adaptation" in place of "replication".

It's useful to define a few key terms upfront when talking about adaptation strategies that enable others to take on a program in their own Jewish communal organizations. This toolkit will use the following definitions:

1. **Originator** – the individual or organization that originally creates a program, method, or set of principles
2. **Adapter** – the individual or organization that takes on a program, method, or set of principles and adapts them to their community

There are three high-level directions you might choose to pursue in order to enable other communities to take on and adapt your program, methodology, or principles. The direction you choose depends on the level of control you wish to have, and the speed by which you hope to reach new communities. There are advantages and disadvantages to each approach, which will be explored in more detail below.



SHARE EXPERTISE WITH OTHERS

In models where expertise is shared with others, originators create resources (toolkits, manuals, etc.) that enable adapters to take on and adapt a program or initiative in new locations. Sharing expertise may involve little interaction between the originator and the adapter. In some cases, a fee can be charged for materials and advice, but there is usually no ongoing financial or legal relationship between originators and adapters.

This approach is generally most appropriate when a project, or elements of it (such as a curriculum, tool, or approach), can be quickly and easily copied or adapted. This is less effective when your program is likely to be misused, and should not be pursued when there is potential for a program to lead to harm if delivered incorrectly. For example, a mental health program may have a specific protocol to care for the wellbeing of suicidal participants, and any community that takes on the mental health program would need a protocol of comparable quality to avoid causing harm. The program may not be well suited for models of sharing expertise with others, because the originator may have a hard time ensuring the quality of the program once adapted elsewhere.

ADVANTAGES	DISADVANTAGES
• Easiest means of quickly reaching new communities • Low ongoing support and monitoring requirements • Often requires less financial investment and time to prepare	• No guarantee the program, methodology, or principles will be implemented well • Difficult to monitor impact or gather learnings from other communities • Income generation likely to be small and less secure • Less likely to capture benefits such as economies of scale and brand awareness

WORK DIRECTLY WITH OTHERS

In models of working directly with others, originators create relationships and networks with other organizations or individuals in order to support spreading their impact to new communities. This approach features an official ongoing relationship between the originator and adapter. Typically, there is some level of legal and financial arrangement between both parties.

These scale models are especially effective when a program should be customized to the local context, but the adapter will require some ongoing support to make sure the program is implemented well.

ADVANTAGES	DISADVANTAGES
• Can balance the priorities of a more rapid expansion with a focus on quality implementation • Do not have to manage day-to-day operations in the same way as with direct scale models • Option to share the financial burden • Ability to harness local resources, knowledge, and ownership • Data on a large scale for impact assessment and advocacy purposes	• No guarantee the program, methodology, or principles will be implemented well • Difficult to monitor impact or gather learnings from other communities • Income generation likely to be small and less secure • Less likely to capture benefits such as economies of scale and brand awareness

EXTEND REACH DIRECTLY

In models where reach is extended directly, originators replicate impact by carrying out delivery in new locations, for example, through setting up local or regional offices. The greatest benefit is a high degree of control – the person delivering the project is employed by the central organization so follows rules and standards provided by them.

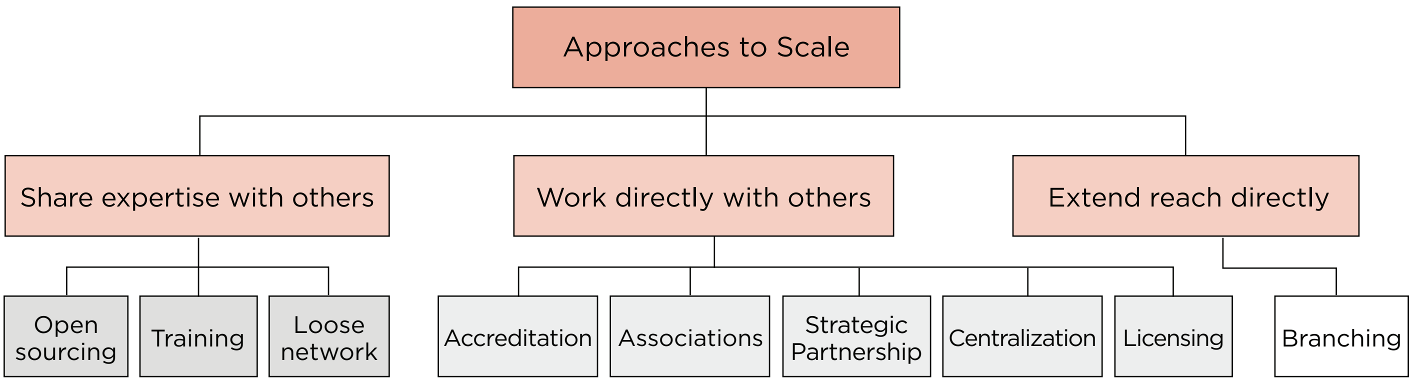
This type of adaptation may be appropriate for complex programs that would require a large amount of knowledge transfer for others to adapt or where the risks of others incorrectly delivering a program are very high.

ADVANTAGES	DISADVANTAGES
• Can oversee implementation and ensure fidelity to original program • Less risk to brand • Decisions can be made centrally, often with less consultation required • Consistent management and reporting	• More difficult to achieve local sense of ownership • Likely to be less flexible and may fail to make necessary adaptations to new contexts • More expensive • Slower way to scale

MODELS FOR SCALING IMPACT

Now that you have been introduced to three directions through which you can extend reach to other communities, you hopefully have a clearer sense for a direction your organization is well positioned to pursue. Within each of the three directions presented, there are specific models for scaling impact. The next section will introduce you to these strategies, and unpack their nuances in more detail.

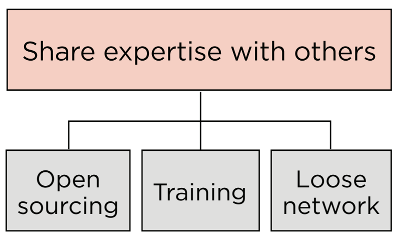
There are nine main models best positioned to help Jewish community programs scale impact. It is worth noting the [Spring Impact Social Replication Toolkit] describes additional models beyond the nine below.



We will begin by exploring the potential scale strategies in which you share expertise with others.

SHARE EXPERTISE WITH OTHERS

Three common models for sharing expertise with others are Open Sourcing, Training, and Loose Networks.



OPEN SOURCING

In open sourcing models, the originator creates resources advising others on how to create programs or interventions in their local area. Resources provided could include online videos, best practice booklets and easy-to-use tools. This generally works best when a program is simple and the adapter who takes and uses the resources is capable of using them correctly. Channels for disseminating those resources include: websites, conferences, and publications. Open sourcing is most effective where there is already a sense of the type of organization or adapter that would use the resource to take on a program in their community.

Open sourcing is often perceived as a simple way to share best practice, but the reality is that it usually needs quite a proactive approach to be successful.

One of the most well-known examples of an open source model is Alcoholics Anonymous. Alcoholics Anonymous published a set of principles, the **Twelve Steps**, that local meeting groups apply autonomously. There is no central organization involved.

Another open source model is **Better Together in a Box**, a free, ready-to-use curriculum that includes teen learning sessions on Jewish values and virtual intergenerational activities that allow teens to connect with elder "buddies." Better Together in a Box also offers a modest grant for Jewish organizations to fund their programming.

ADVANTAGES	DISADVANTAGES
• Can be the least costly form of bringing impact to new communities • Easiest means of rapidly expanding your geographical reach	• Little control over way resources are interpreted and used which can impact quality

Key success factors:

- Easy-to-understand resource structure and content
- Supply of adapters capable of using resources successfully
- Proactive dissemination plan with targets and if relevant, small incentive grants

TRAINING

Originators can teach adapters to implement a model or aspects of it through courses, workshops or seminars. Training works best when resources need explaining, or some local adaptation initially, but can then be easily used independently.

One option is the train-the-trainer model that enables the originator to show a less experienced instructor how to deliver the training themselves. Often, a new instructor will attend a training event led by the originator to allow them to observe how a normal session is run. They will also generally receive guidance on how to deliver their own training events. This allows you to expand your reach more quickly and offers the originator some but not significant control over quality.

An additional example of a training model is the National Lawyer Guild's Legal Observer® Program, which prepares individuals to observe and record incidents and the activities of law enforcement in relation to demonstrators. National lawyers Guild provides a Legal Observers training manual that is supplemented with in-person trainings held several times a year in various locations around the country.

Another example of a training model is Youth Mental Health First Aid, an 8-hour course through the National Council of Behavioral Health. This course, led by certified facilitators overseen by the Funder Collaborative, teaches participants about risk factors and warning signs for a variety of mental health challenges applicable for Jewish Youth settings. Unlike some other training models, Youth Mental Health First Aid is also paired with a certification.

ADVANTAGES	DISADVANTAGES
• Teach others the fundamentals of your program • Can be a source of limited income	• The individuals being trained may not implement lessons correctly

Key success factors:

- Easy-to-follow structure, resources and expectations
- Clear learning objectives and milestones

LOOSE NETWORKS

Loose Networks are networks of individuals or organizations who share the same social mission but with little coordination or control. The originator shares resources with the network, which often grows spontaneously with adapters rallying behind a popular cause. Network members may or may not share the same brand.

Loose networks are generally appropriate where adapters benefit from an ongoing association with the originator, where they need only limited support and there is little risk to any shared brand. Technology can be used to improve communications across the network, creating a common sense of purpose and community. Adapters may be allowed to pick and choose elements of the program to apply. Other characteristics of a loose network often include:

- Relatively loose relationship between original and adapting organizations
- No formal agreement or contract
- Considerable room for local adaptation and innovation
- Relatively even distribution of power between network members
- Recruitment processes relatively or completely open

One example of a loose network model is the **Coalition on Human Needs**, an alliance of civil rights, religious, labor and professional organizations working together to promote public policies that address the needs of low-income and other vulnerable populations. The coalition publishes and sponsors educational seminars and facilitates forums for member organizations to share information and collaborate on public policy issues.

Another example of a loose network model is **Nitzan**, a network of programs committed to renewing Jewish learning after school through immersive and stimulating Hebrew language and Jewish cultural experiences. Nitzan unites geographically-distributed programs though shared resources and connections, as well as advocates for alternative Jewish afterschool programs.

ADVANTAGES	DISADVANTAGES
• Rapid expansion of reach • High degree of flexibility for adapters to innovate to meet local needs • Best if program, method, or principles can be adapted significantly	• Can be difficult to lead • Members often work in an incoherent way, often leading to unnecessary duplication of efforts • Often focused on a broad mission but not on specific impacts • Lack of coordination and control presents risks to the brand or program

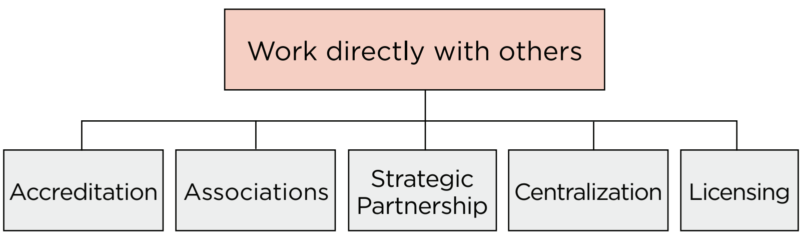
Key success factors:

- Finding a cause or rallying point that will generate enough interest to form a network
- Simple, easy-to-implement programs scale quicker
- Being clear on who makes what decisions where, and when
- Buy-in from all parties

There are additional options for sharing knowledge with others that are typically less relevant to the Jewish Community. To explore these options, please access the Spring Impact Social Replication Toolkit here.

WORK DIRECTLY WITH OTHERS

Four common models for working directly with others are Accreditation, Associations, Centralization, and Strategic Partnerships.



ACCREDITATION

Under this model the originator becomes the accreditor, providing formal third-party recognition by way of a recognized 'mark' of competence for others to operate a program. Conditions attached to the accreditation will help to ensure that the program is implemented with quality. When done effectively, this makes certified organizations or individuals stand out from other similar providers, by extending value through shared or recognizable branding. Periodic fees can be charged to help boost income, though it often proves challenging to raise enough finance this way to sustain central operations.

A well-known example of accreditation model is Fair Trade, which requires all food producers to provide fair wages and abide by standards for health and safety of working conditions. In exchange produces are accredited as a Fair Trade producer, which helps them stand out within the market.

Another example of the accreditation model is the *hechsher* system that modern Jewish institutions employ to certify foods and other products as Kosher. Like the Fair Trade example above, these symbols on packaging indicates to consumers that the product was brought to market under the observance of Jewish dietary laws and restrictions. Organizations, such as the Orthodox Union, accredit these products and producers with their seal of approval, which helps observant customers feel confident in their purchase.

ADVANTAGES	DISADVANTAGES
• Can enforce standards without needing to create a large central support body • Can create a strong brand awareness with a well-marketed accreditation system.	• Requires significant effort and resources to generate awareness of accreditation mark • Can be time-intensive to ensure appropriate use of the mark

Key success factors:

- Finding a compelling need for accreditation
- Generating accreditation mark awareness among beneficiaries

ASSOCIATIONS

Associations involve individuals or organizations entering into an agreement to achieve a common purpose. In an Association, members operate and raise funding in communication with peer organizations. However, there is central organization and coordination of activities. As in Loose Networks, members may be able to choose which aspects of a program to implement and which to not.

The originator often takes on a role to coordinate the network and/or fulfill certain functions as the network's center. However, the originator may be held accountable by a governance structure in which all members of the network are considered as equals.

One example of association models is Feeding America, the nation's largest domestic hunger-relief organization. Feeding America is a central entity that secures donations from national food and grocery manufacturers and matches excess food with the food banks that most need it. The network of food banks receive, store, and distribute donated food and grocery products. Feeding America's central entity also promotes public education about food insecurity and supports food banks with training or equipment.

Another example of association models is the The Efshar Project, a network of ten early childhood centers in Denver and Boulder. The coordinating body of the initiative provides professional development for early childhood educators, public advocacy for the value of Jewish early childhood education, and assistance navigating operations in moments of crisis (i.e. during the COVID-19 pandemic). Participating early childhood centers pay a small annual membership fee.

ADVANTAGES	DISADVANTAGES
• Works well when a number of similar potential adapters already exist and your program(s) would add incrementally to their work • Relationship between parties leads to greater accountability • Allows for sharing of experiences and best practice across network members • Can reap economies of scale through sharing certain functions	• Likely to involve duplication of efforts • Can be challenging to lead towards a common purpose • Can be challenging to define a level of centralization that works for everyone

Key success factors:

- Strong emphasis on representation – understand your members and then act as a spokesperson for their concerns
- Being clear on the roles and responsibilities of the center (if applicable) and network members

STRATEGIC PARTNERSHIPS

In strategic partnerships an originator enters into an agreement to collaborate with one or more partners to address common goals and opportunities. Any partner you choose needs to be well placed to help your organization adapt your program(s) in a new community. Unlike short-duration partnerships formed in order to secure funding, such agreements should generally emphasize a long-term relationship and financial sustainability.

Strategic partnerships could be with a range of similar-sized or smaller organizations who might have similar capabilities to your own, or they could be with larger organizations whose existing infrastructure could enable rapid scale up. When pursuing strategic partnerships, it is important to set expectations early on, think carefully about whether you want to work with and can trust the partner, and formalize your expectations in a written agreement.

One of the best-known examples of a strategic partnership model is the matchup between Starbuck and Barnes & Noble. Almost every Barnes & Noble bookstore has an in-house Starbucks coffee shop – Starbucks bringing customers into the bookstore in the morning when people usually do not shop for books, and Starbucks generating sales when customers pause for a break in shopping. The companies also collaborated to develop Barnes & Noble cafes that license the Starbucks brand and serve coffee.

Another example of a strategic partnership model is the collaboration between The NorthEast Teen Collective, Union for Reform Judaism, and JumpSpark to launch JumpSpark's peer leadership program in Atlanta. NorthEast Teen Collective and URJ shared their model, recruitment process, and methodology for peer to peer engagement with JumpSpark, and supported program set-up. The partnership is supported with shared funding and a memorandum of understanding, and the organizations are in frequent communication to share learnings and continue developing programming.

ADVANTAGES	DISADVANTAGES
• Make use of others' technologies, skills, capabilities and competencies that would otherwise be difficult or take a long time to develop • Partnering with large organizations can lead to a rapid scale up	• If there are many (potential) partners negotiation will become time-consuming and costly • Large organizations may risk turning into a glorified subcontracting arrangement

Key success factors:

- Developing shared vision and value statements
- Ensuring that each partner's resources are appropriately valued
- Accountability for all involved, with clearly defined decision-making processes, objectives, performance standards and assessments
- Having a formal written agreement that is clear on IP use

There are additional options for working with others that are typically less relevant to the Jewish Community. To explore these options, see here.

CENTRALIZATION

Centralization brings together an existing set of programming or group of organizations under one umbrella. Centralization models are similar to Associations but with a greater level of coordination as members work towards a shared goal. They include principles and stipulations regarding how those involved work together, backed up by oversight mechanisms and formal agreements.

Typically, an existing organization with the necessary infrastructure and network is established as the Center. This organization coordinates with other member organizations and works to scale programs across geographies. Member organizations are most likely to weigh in at the local level, when it comes to adapting programming to fit specific regional contexts.

Centralization models are likely to share a common brand and often use a governance structure in which the central support organization oversees the rest of the network.

An example of the centralization model is The International Planned Parenthood Federation IPPF). IPPF is a global NGO with the broad aims of promoting sexual and reproductive health and advocating the right of individuals to make their own choices in family planning. They have 118 member associations in 129 countries, with 6 regional offices that oversee, promote, and distribute core funds to member associations and a central board of directors. Due to the importance of the local political and cultural climates in their work, not all members share the same name or exact operations.

ADVANTAGES	DISADVANTAGES
• Enable sharing of experiences and best practice across network members • Central organizations tend to be well established leading to a stronger brand and deeper impact for the scaled programming and/or solutions • Can reap economies of scale through consolidation of certain functions	• Program originators may lose control over how their programming is implemented elsewhere • It can be challenging to define the right level of responsibility between the central and member organizations

Key success factors:

- Running an efficient process to create consensus between members regarding the role the Center should fulfill
- Being clear on the roles and responsibilities of the Center and local members
- Ensuring local members understand and look at the Center as the main decision making body for the network

LICENSING

Licensing is a contractual agreement between two parties, where the originator (licensor) leases its program or product to adapters (licensees) under specific conditions. The licensor owns the intellectual property (IP) and can set the terms for geographical use, length of time, and how the product or program is to be used. Licensors typically collect licensing fees from licensees on a 1-3 year basis. The licensee, in turn, is granted access to the IP, and other benefits that licensors offer their licensee network.

An example of the licensing model is Recovery Cafe Network, a nonprofit committed to serving people suffering from homelessness, addiction and other mental health challenges. Individuals or organizations interested in bringing a Recovery Cafe to their community will apply to become a licensee. If approved, they start as an Emerging Member, and receive training, resources, and rights to the brand for 2 years. They are then evaluated on how they have implemented the model to become a Full Member, and if approved, granted a full license that will be evaluated every 3 years.

An example of the licensing model in the Jewish community is JLicense (www.jlicense.com). Created by Jewish clergy and professionals from within the organized Jewish world, and powered by Transcontinental Music, Jlicense is a music-licensing agency that serves artists and encourages the composition of new Jewish music by helping synagogues and other Jewish organizations to be compliant with copyright law. Users can conveniently purchase licenses to legally record, customize, stream, post, and archive copyrighted music and lyrics.

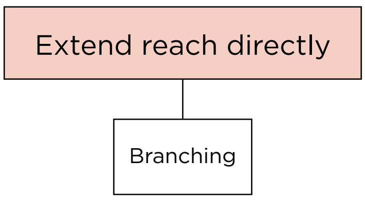
ADVANTAGES	DISADVANTAGES
• Effective way of rapidly distributing more complex products or programs • Financial costs are already built into the business model • Allows for greater control over how an originator's IP are used by adapters	• There are limitations to the quality control, as the originator has no control over the business operations of the licensee • Licenses usually require protecting intellectual property which can be expensive and initially time-consuming

Key success factors:

- Setting up the terms of the license clearly, including: fees, terms of use, support that will be provided
- Put a brand strategy into place, to market the program or product license

EXTEND REACH DIRECTLY

Extending reach directly is also known as branching.



BRANCHING

Branches are wholly owned organizational units that are managed and controlled by the central organization, with local staff operating the branch but reporting directly to the central office. Local branches may have their own advisory boards, but the governance responsibility lies primarily with the central board of directors.

Well managed branches give the central organization a level of control which helps to protect its brand and reputation. Coordinating overall strategy and operations also allows for a greater amount of consistency. Where organizations expand using multiple strategies, branches serve as models, testing grounds for new ideas, and a means of keeping the central office in tune with actual delivery of service.

One of the largest and longest standing examples of a branching model within the social sector is Teach For America. Teach For America trains college graduates to become teachers in some of the most underserved schools in America. With 50 branches across the country, the central office will share a portion of their funding and has a main board of directors, but each branch has a local advisory board and their own share of funding responsibilities. The standards for teacher recruitment and training is consistent across all branches, which was important for the program's impact and reputation in the education sector.

An example of branching in the Jewish organizational world maybe "movement-based" summer camps. Camps that are affiliated with a Jewish denomination such as the Reform Movement's URJ camping network or the Ramah movement preserve local culture, flavor, traditions, emphasize local partnerships (such as food service), respect local policies or laws, etc. but year-round leadership are employed by a central agency (like the URJ or USCJ), training for staff is unified, some internal policies and rules are governed by a central agency, etc.

ADVANTAGES	DISADVANTAGES
• Can provide a higher degree of control which can be desirable when the program being implemented is complex or relies heavily on knowledge that is hard to transfer to others • Can be suitable when an organization is in the early stages of growth and is interested in testing and refining its model in new locations, or the organization has less ambitious expansion plans	• Resource-intensive: originator has to invest heavily in its own readiness, the process by which it opens new branches, and in the new branches themselves • Requires high levels of ongoing support and monitoring • Maintaining a close-knit culture and recruiting the right leaders can be difficult • Usually grow at slower rates given the greater investment of resources by the central organization

Key success factors:

Achieving the right level of centralization versus decentralization of certain activities: decentralization can lead to people duplicating efforts across different offices, centralization can lead to slow and bureaucratic decision-making and processes

!! STOP AND THINK

Do you already have a sense of the model, or a few models, that you imagine are the best fit for you?

You will continue to identify the model best suited to bring impact to new communities as you advance throughout this Toolkit. This process begins by articulating exactly what impact you are hoping to achieve, which will be explored in the next section: Setting Your Goal.

SETTING YOUR GOAL

An impact goal is a single statement that defines the impact you wish to achieve with measurable and realistic targets. It is different from, but should complement, your organization's mission and vision. While you have likely invested a great deal of time into refining your mission and vision to date, the impact goal should be new and unique to your aspirations for scale, and should define a nearer-term impact milestone you wish to achieve on your journey to fulfilling your mission.

In many cases, an organization will not be able to achieve its impact goal on its own. The impact goal may highlight where it will be important to share expertise with others, or establish relationship and networks, in order to reach and engage more communities. Defining your impact goal helps select between different models of scaling impact.

Impact goals have four elements: the target population, location, timeframe, and metric.

Impact Goal Aspect	Prompt	Example
Target Population	Who are you directly and indirectly engaging with your program or service?	Jewish high school students entering 10th through 12th grade
Location	Which Jewish communities do you aim for the program to reach?	4 other cities on East Coast (Brooklyn, Queens, Long Island, Boston)
Timeframe	By when are you aiming to have reached these communities?	5 years
Metric	What information or data will demonstrate that the program was successful in these communities? What is your target that is achievable and ambitious?	1,800 students engaged in the program have a stronger sense of self, host at least 2 peer events within their communities.

Combine the four components together to create the impact goal.

For example, "In the next five years, 1,800 Jewish high school students in four cities on the East Coast will have developed a stronger sense of self, and have regularly engaged peers".

STOP AND THINK

Practice crafting your impact goal based on the guidance offered above and using the workbook below.

Having a clear sense for the impact you aim to create will be relevant for building understanding in the next section, which explores how to assess community demand and potential funder appetite for your program.

Part 1: Use the table below to create the four components of your impact goal.

Impact Goal Aspect	
Target Population	
Location	
Timeframe	
Metric	

Part 2: Combine the four components you drafted above together to create your impact goal.

Once you draft your impact goal with your team, outline how you will reach your goal, estimating the impact, site by site, year by year. The following is a sample roadmap based on the impact goal from the recent example. Note that this organization has decided to stagger when they will open each new community, and after a couple of years, the number of students increases more rapidly.

Impact Goal Roadmap Example

	Year 1	Year 2	Year 3	Year 4	Year 5
Site 1: Brooklyn	50 students	100 students	150 students	200 students	300 students
Site 2: Queens		25 students	50 students	100 students	200 students
Site 3: Long Island		25 students	50 students	100 students	200 students
Site 4: Boston				100 students	200 students
Total per year	50 students	150 students	200 students	500 students	900 students

Use the following roadmap to understand how you will achieve your goal.

Your Impact Goal Roadmap Template

	Year 1	Year 2	Year 3	Year 4	Year 5
Site 1					
Site 2					
Site 3					
Etc.					

Next steps to finalizing and using your impact goal:

- Review how current activities contribute towards your goal
- Share your impact goal with key stakeholders (e.g. board, funders, advisers) and gather feedback
- Use it to maintain focus, determine where you want to scale, and decide how to allocate resources
- Continuously track progress
- Share your impact goal to inspire your team and your supporters!

ASSESSING COMMUNITY DEMAND AND FUNDER APPETITE

Now that you have a sense of the impact you wish to achieve, it's important to take a step back and consider the feasibility of reaching and engaging more communities. Assessing community demand and funder appetite will help you determine whether it is worth embarking on what can be a resource-intensive undertaking.

Each question is worth considering in depth. Ultimately, it's best to be honest here.

Score your program on a scale of 1-3 for the following questions.

Community Demand

Q1: Does your program generate interest among parents and teens? Are your program's offering regularly filled either to capacity or with critical mass?

1: Programs are not well attended.	**2:** Program attracts a limited number of repeat, highly engaged participants, marketing is primarily staff led.	**3:** Program is well attended, and periodically sold out. Marketing is increasingly word-of-mouth.

Q2: Is there at least one unique selling point (USP) about the program that differentiates it from others? Is there evidence that this unique selling point is an improvement compared to other programs?

1: Have developed some theory behind the USPs but no evidence.	**2:** Have defined the USPs with some evidence of improvement compared to other programs.	**3:** Have well defined USPs and evidence of significant improvements compared to other programs.

Q3: Do your program's goals align with those of other Jewish communities?

1: Success of the program is very specific to the local community.	**2:** Some evidence that the factors of success for the program would be present in other communities.	**3:** Strong evidence that the factors of success for the program would be present in other communities.

Q4: Are organizational leaders from other communities interested in or asking for the program?

1: No other communities have yet shown demand for or interest in the program	**2:** There has been moderate demand in or interest from other communities.	**3:** Numerous other communities are expressing interest in or asking to adapt this program

↓ *cont.*

Funder Appetite		
Q5: Does your organization have the potential to attract funding to prepare for scaling to new communities (i.e. create resources and provide support)?		
1: Little evidence that there is interest in funding plans to extend impact into new communities.	**2:** Little evidence that there is interest in funding plans to extend impact into new communities.	**3:** There is at least one funding partner that has expressed interest in funding strategy and plans to extend impact into new communities.
Q6: Does your program have the potential to attract and sustain funding in a new location?		
1: Little evidence that funders are interested in funding the program in another community.	**2:** Moderate evidence that funders are interested in funding the program in another community.	**3:** Other funders have already approached the program offering to fund in another community.

Scalable Program		
Q7: Have the program's outcomes been proven and evaluated? Is there a theory of change or similar framework, and before and after data in place?		
1: Internal evaluation process has shown a reasonable level of evidence of the program's impact.	**2:** Internal evaluation process has shown high level of evidence of significant programmatic impact.	**3:** At least one rigorous external evaluation process has been conducted on the program and shows significant impact.
Q8: Are the core elements of the program and what is being scaled clear?		
1: It's not clear whether it is a program, set of values, approach, methodology, or other aspect that should and can be replicated.	**2:** Some clarity on what should or can be replicated, but more analysis needed.	**3:** Clear understanding of what should be replicated.
Q9: Has the program been replicated 1+ times in local community, or has serviced multiple groups (i.e. multiple rounds of teen innovation awards)?		
1: Program only operating in one location or has only served one group.	**2:** Program is operating in 2-3 locations or has had served two groups.	**3:** Program is operating in 3+ locations and has served more than two groups.
Q10: Are the necessary processes and systems well-defined and developed to ensure quality?		
1: Few or no processes and systems exist or they are fragmented and/or difficult to find.	**2:** Most processes and documentation for delivery and replication are in place but with some gaps.	**3:** Accurate documentation is in place for process, systems, training, legal agreements, procedures and ensuring quality.

↓ *cont.*

Q11: Does the program have a clear sustainability plan for the next 3-5 years (multiple funders, diversified revenue)?

1: There is little evidence that the program will be sustained locally.	**2:** There is evidence demonstrating the program's sustainability, including a track record of securing sufficient income and rationale for this to continue.	**3:** There is detailed evidence around sustainability including documentation around income sources, profit levels, reserve amounts, income ratios etc.

Q12: Has the program evaluated cost efficacy and ensured the cost of the program is scalable?

1: The program cost has not yet been evaluated or is in need of improvement to make it more cost effective.	**2:** The program has evaluated cost efficacy and is beginning to take steps towards improving cost-efficacy.	**3:** The program has been evaluated and is determined to be cost effective.

Organizational Capacity

Q13: Is there resistance on the part of local funders and programs team to scaling the program into new geographic locations?

1: Stakeholders are hostile towards adaptation and/or there has been no consultation at all.	**2:** Stakeholders are neutral towards adaptation and/or there has been limited consultation.	**3:** Stakeholders fully support adaptation and have been consulted.

Q14: Do the local funders and/or program team have deep programmatic knowledge and the capacity to work with Spring Impact and the Funder Collaborative to develop and implement the adaptation model (i.e. participate in a Scaling Masterclass or individual coaching)?

1: There is no capacity among knowledgeable members of the local community to work towards scaling.	**2:** There is sufficient capacity among members of the local community to work towards scaling.	**3:** There is significant capacity and buy-in among members of the local community to work towards scaling.

Q15: Is there is a clear project owner to lead scaling efforts?

1: There is no one within the local community that has the capacity to lead scaling efforts.	**2:** There is a clear project owner with a relevant skill set who can lead scaling efforts.	**3:** There is a clear project owner with previous experience in scaling and is trusted by stakeholders.

STOP AND THINK

Take a moment to self-assess your program, using the workbook below. Often, it's helpful to ask someone else who knows the program well, like a team member or collaborator, to assess the program for a second perspective.

Part 1: Use the table below to score your program on a scale of 1-3 for the following question related to community and funder demand.

Self-Assessment Questions	Score (1-3)
Community Demand	
Q1: Does your program generate interest among parents and teens? Are your program's offering regularly filled either to capacity or with critical mass?	
Q2: Is there at least one unique selling point (USP) about the program that differentiates it from others? Is there evidence that this unique selling point is an improvement compared to other programs?	
Q3: Do your program's goals align with those of other Jewish communities?	
Q4: Are organizational leaders from other communities interested in or asking for the program?	
Funder Appetite	
Q5: Does your organization have the potential to attract funding to prepare for scaling to new communities (i.e. create resources and provide support)?	
Q6: Does your program have the potential to attract and sustain funding in a new location?	
Scalable Program	
Q7: Have the program's outcomes been proven and evaluated? Is there a theory of change or similar framework, and before and after data in place?	
Q8: Are the core elements of the program and what is being scaled clear?	
Q9: Has the program been replicated 1+ times in local community, or has serviced multiple groups (i.e. multiple rounds of teen innovation awards)?	
Q10: Are the necessary processes and systems well-defined and developed to ensure quality?	
Q11: Does the program have a clear sustainability plan for the next 3-5 years (multiple funders, diversified revenue)?	
Q12: Has the program evaluated cost efficacy and ensured the cost of the program is scalable?	

↓ *cont.*

Organizational Capacity	
Q13: Is there resistance on the part of local funders and programs team to scaling the program into new geographic locations?	
Q14: Do the local funders and/or program team have deep programmatic knowledge and the capacity to work with Spring Impact and the Funder Collaborative to develop and implement the adaptation model (i.e. participate in a Scaling Masterclass or individual coaching)?	
Q15: Is there is a clear project owner to lead scaling efforts?	

Part 2: Step back and look at your scores.

Have you scored a 1 in any of the questions? If so, consider pausing plans to extend impact into new communities, and focus on strengthening that aspect of your program or gathering more information.

If you scored a 3 against the majority of questions, it's a good sign that you are ready to effectively and sustainably extend your impact to new communities. Areas where you self-scored a 2 should be your focus for improvement as you plan and implement your model.

SPECIFYING YOUR MODEL AND ROLE

As outlined in the first chapter, there are many models you can use to help other communities adapt and take on your program. The right model depends on many factors including how quickly you are hoping for other communities to adapt your program, whether it is important to ensure the program is delivered with a high degree of quality, and whether you would like to have an ongoing relationship with others that adapt your program.

In order to better understand your model and role helping impact extend to other communities, it's helpful to define key criteria or "design requirements" related to your program and priorities.

Start by thinking through the following questions for your own program.

Areas	Key Questions
Complexity and Flexibility	• How complex is your program? • How much of the program must be done exactly the way it's done now and how much is flexible to be adapted by the local community?
Adapter Profile	How open or strict is the profile of the adapter that is taking on your program? How selective do you want to be? (e.g. alignment of values or ideology, existing resourcing, etc.)
Impact goal	How quickly are you hoping to see the program adapted by new communities, and how many communities are you aiming to reach?
Support	Will adapters who take on the program in their own community require ongoing support to run the program effectively? Is this a light level of support (ex: answering questions in a phone call) or more intensive support (ex: helping plan launch events)?
Evidence	Will you need adapters to share back data or evidence from their program? If so, what level of data or evidence?
Interactions among adapters	How important is it that adapters can interact with each other (share knowledge, ask questions) across communities?
Financial relationship with adapter	What is the financial flow between the originator and the adapter? Are there any shared funding responsibilities?

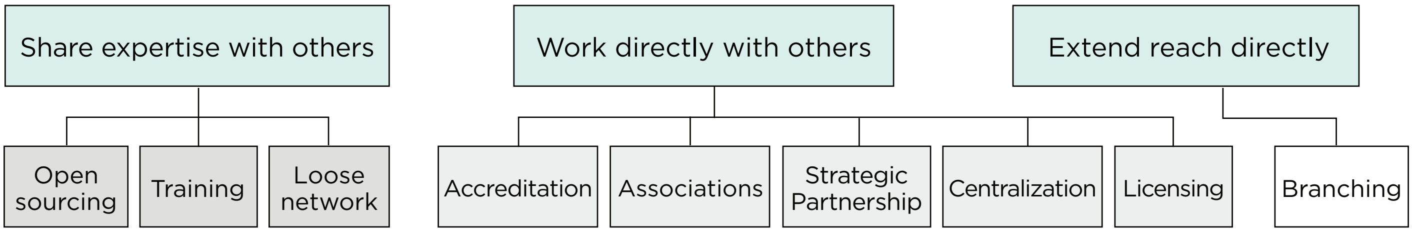
STOP AND THINK

Try writing out your answers to the above questions using the table below.

Do you feel clear on your answers to the questions? This can be a good opportunity to consult others.

Areas	Answers to Key Questions
Complexity and Flexibility	
Adapter Profile	
Impact goal	
Support	
Evidence	
Interactions among adapters	
Financial relationship with adapter	

Now consider what model makes the most sense for your program. Use the following table to understand how your answers to the above questions help determine which model and role is the best fit. As a reminder, there are nine main models best positioned to help scale impact for Jewish community programs.



	Open-source	Training	Loose Networks	Accreditation	Association	Strategic Partnership	Centralization	Licensing	Branching
Complexity and Flexibility	Best for simple programs or a set of principles	Best for simple programs or a set of principles	Best for simple programs or a set of principles	Best for a standard set of principles that must be adhered to	Best for moderately complex programs	Best for moderately complex programs	Best for moderately complex programs	Best for moderately complex programs	Best for highly complex programs
Adapter Profile	No selection of adapters	Adapters must request training	Minimal control over which adapters are allowed into network	Adapters must pass standard for certification	Best for moderately complex programs	Adapters are recruited or screened	Adapters are already known, or recruited and screened	Adapters are already known, recruited, and screened. License is typically renewed annually or every 2-3 years	Adapters are hired directly by the originator
Impact goal	Requires upfront time to develop content, but can reach unlimited communities	Requires upfront time to develop training, but can reach a large number of communities	Possible to reach many communities rapidly	Possible to reach many communities rapidly	Requires time to establish association, can reach a small or large number of communities	Limited number of communities and speed due to partnership building and partner support	Can reach a small to large number of communities or member organizations	Can reach small to large number of communities	Creating a new branch or regional office requires significant time, effort, and resources
Support	No ongoing support	Initial light support through training, no or limited ongoing support	Limited initial or ongoing support	Typically, no initial or ongoing support beyond renewing of certification	Possibility for significant initial and some ongoing support, including marketing, shared resources	Significant initial and ongoing support, including initial launch support, and ongoing troubleshooting	Moderate to significant initial support, varying levels of ongoing support	Significant initial support, ongoing support level varies	Significant initial and ongoing support within organization
Financial relationship with adapter	Typically provided as a free resource, or incentivize adapters with small grant	Originator charges fee for training service	Option for adapters to pay small fee for membership	Option for adapters to pay small fee for membership	Option for adapters to pay small fee for membership	A grant is shared across partners or partners seek separate funding	Central organization usually seeks funding and sometimes distributes a portion of it to the network members	Adapter pays a license fee on an ongoing basis	Some type of shared funding structure with adapters
Evidence	No evidence or data shared back	No evidence or data shared back	Adapters share data with each other across the network	Adapters must share evidence of compliance with standards for certification	Adapters share data with each other across the network	Adapters may be required to collect and share back select data and evidence	Adapters may be required to collect and share back select data and evidence to Center	Adapters usually share evidence	Adapters collect the same data or evidence across the organization
Interactions amongst adapters	Typically, no interactions	Typically, no interactions	Adapters can identify each other, and may spontaneously interact with each other	Adapters can identify each other, but are unlikely to interact with each other	Adapters have a strong relationship with each other and interact in formal network	Typically, no interactions	Adapters may have limited interaction with one another	Adapters usually have some to limited interactions with each other	Adapters interact in organizational meetings or cross-regional initiatives

STOP AND THINK

Use the table from the above page to help you determine what model(s) might make the most sense for your program.

Part 1: Circle the level in each row that most closely aligns with your answers.

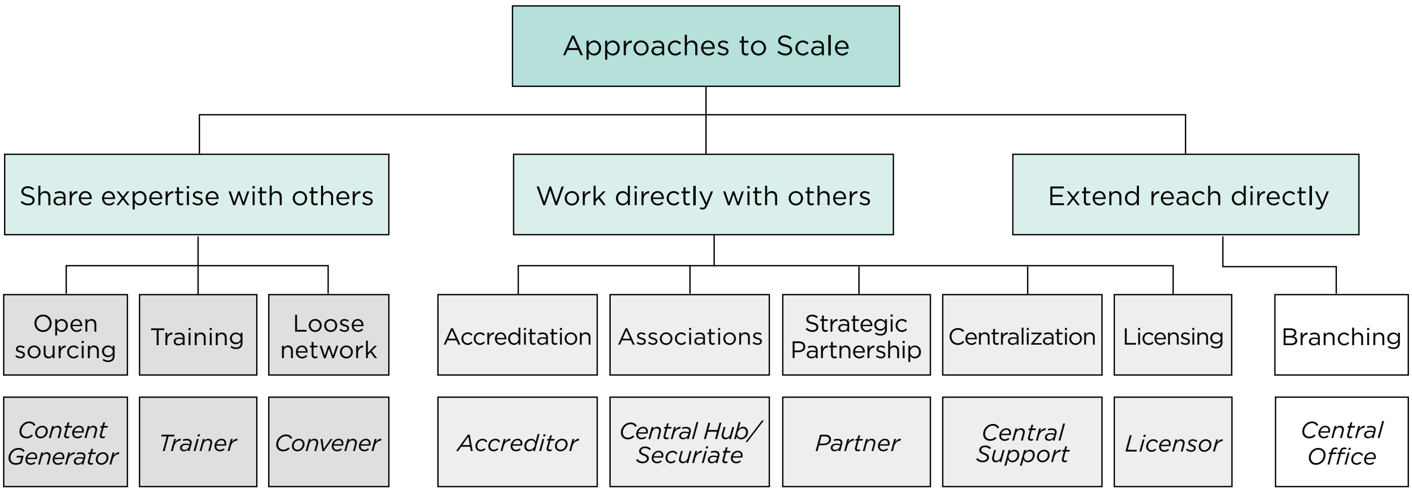
Part 2: Which model's column has the most circles? What model(s) do you think might make the most sense for your program? Why?

It's important to also consider the role you and your organization want to play in helping other communities take on your program. Models where you share expertise with others tend to be less effort because content is typically generated once and put out into the world. Models where you work directly with others or extend reach directly are more involved.

Depending on the model you choose, your role can look quite different. For example:

- In an open sourcing model, your role likely involves generating resources that advise others on how to create programs or interventions in their local area or improve what they are already doing
- In a loose network model, your role likely involves helping convene other organizations or individuals with a common sense of purpose and community
- In a strategic partnership model, your role likely involves developing relationships with other and supporting them by providing initial training, resources and remote or in-person ongoing support

See a summary of the roles associated with each model below:



STOP AND THINK

Do you already have a sense of the roles that you want, or feel prepared, to play?

It's not always the case that you or your organization need to play a role yourself. For example, if you choose an association or centralization model, you could involve a 3rd party or partner to serve as the central hub.

CAPTURING CORE COMPONENTS

The 'Core' refers to the essential elements of your program or organization which create impact in your community, and therefore should be included anytime the program is adopted by another community.

WHY DO I NEED TO THINK ABOUT CORE ELEMENTS?

It is important to reflect on the aspects of your programming that drive impact in your community, and set you apart from other Jewish organizations. This helps to isolate what is absolutely critical to be taken on by other communities, what must be adapted for the local context, and what is less important for impact.

To begin, you should first identify what is driving the impact of your model where it already exists. Is it...

- The **principles** and **approach** that underpin what you're doing?
- A **program** structured in the specific way it exists?

When thinking about core elements, it's useful to ask yourself:

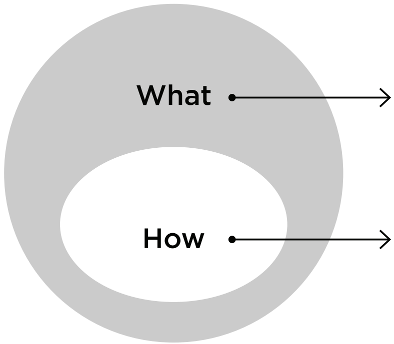
- Which elements of what we do are vital to achieving our mission and impact?
- Is this backed up by evidence?
- What aspects of what we do would others benefit from?

GUIDELINES FOR DEFINING YOUR CORE ELEMENTS

Core elements need to be defined at two levels. Start by making a list of the key activities and aspects of the program (the 'what'), as well as the different structures and systems that enable you to deliver it effectively (the 'how').

Note: These guidelines are illustrative of a path in which you pursue bringing a program to new communities, but could be significantly cut down if it's determined you are focused on enabling others to apply a set of principles.

"What" - Program Activities and Aspects	"How" - Structure and Systems
These core elements pertain to the impact your program(s) deliver. Examples may include: • Methodology • Program components • Delivery platform	These core elements pertain to 'how' your programs are delivered or organization operates. Examples may include: • Staff functions • Training • Business systems and equipment • Partnerships • Site/Facilities



- Values, staff functions, office space, training, timing, business systems and equipment
- Delivery of your program to the Jewish community

1. Once you have gone through and identified all of the elements, see if these can be broken down any further into sub-elements. For example, if you have several values that are core to your systems and structure, then list these out. If you have a specific methodology that needs to follow certain steps, outline the main steps as sub-elements.

2. For each sub-element decide what is exact versus flexible for others who take on the program.

- **Exact** - What elements are prescriptive (or should be replicated exactly) as opposed to recommended? For example, “training must take place in a group of 15 people or less, and must follow a set structure in each session”.
- **Flexible** - What elements must be carried out but can be done in a flexible way based on the local context? For example, “there is a defined time period over which training must take place, but it’s up to the local community to choose when”.

See below for an example of what core might look like for a Jewish teen leaders fellowship:

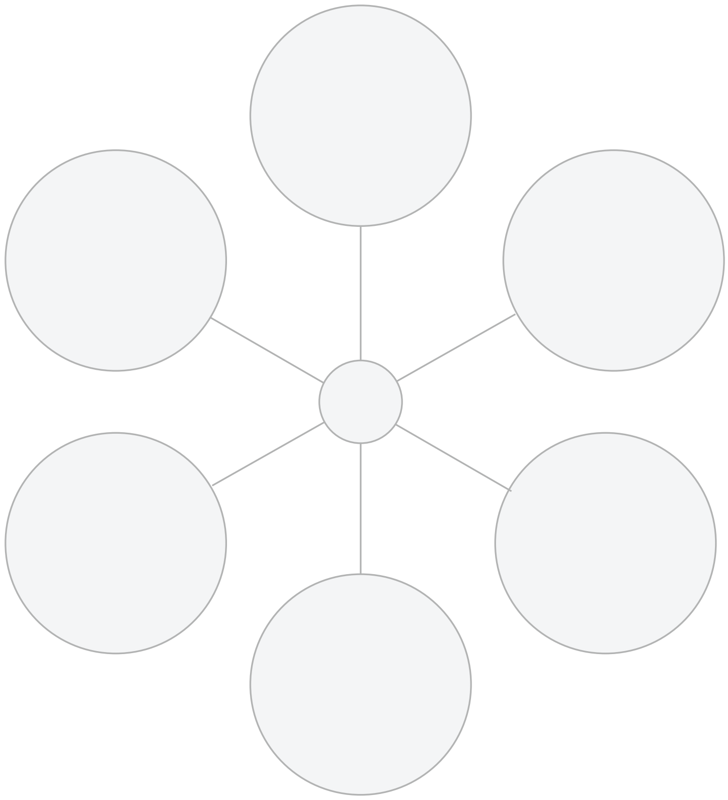
Impact Delivery Core Elements	Structure and Systems Core Elements
Pre-program • Promotion and recruitment is teen-led (flexible) • Participants complete short online application process (flexible) **Monthly sessions** • Meetings with group size no larger than 15 teens (exact) • One meeting per month for the duration of the school year (exact) • Each meeting includes an external speaker followed by small group discussion (flexible) **Post sessions** • Participants reflect and complete creative exercise following each session (flexible)	**Values** • Teens as leaders – choosing the topics and leading the discussions (exact) **Staff Functions** • Part-time role to facilitate discussions and arrange speakers (flexible) **Partnerships** • Middle school staff to refer interested teens (optional) • Connections to local speakers (flexible) **Site/Facilities** • Private room for teens to meet in-person (exact) • Group discussion takes place in a circle (optional)

STOP AND THINK

Use the tables below to write out your core elements.

Part 1: Start by mapping out a list of the core elements of your program that lead to impact. Core elements include the “what”—program activities and aspects—as well as the “how”—different structures and systems that enable you to deliver you program effectively.

The “What”
You may find you don’t need to fill all the circles in the diagram below, or you may need to add extra.



The “How”
You may or may not have core elements to your structure and systems core elements for each area below.

Value	Staff functions	Training	Business Systems & Equipment	Partnerships	Site & Facilities	Other

Part 2: Write each high-level element you identified in Part 1 into column A. Breakdown this element into its sub-components in column B.

Part 3: Indicate whether sub-elements are exact or flexible.

A: Core element	B: Sub-components	Exact Critical	Exact Flexible

Part 4: Once you have a first draft, go through every element and ask yourself, why is this element essential for impact? Is there anything that can be removed?

DETERMINING ROLES AND RESPONSIBILITIES

Roles and responsibilities define which activities will be completed by you and which will be completed by others that adapt your program.

WHY DO I NEED TO THINK ABOUT ROLES AND RESPONSIBILITIES?

- Adapters can understand what is expected of them
- You can prepare for activities required to support adapters
- You can more easily communicate the structure of your partnership to others, including funders

GUIDANCE TO DEFINE ROLES AND RESPONSIBILITIES

Determine who is responsible for your program activities, as well as the key systems and structures to deliver the program. Use the list below to identify and differentiate between an adapter's key responsibilities and yours. Depending on your program, you may not have relevant responsibilities for each area, or you may need to add other areas.

Area	You	Adapter
Program Activities	Which program activities, if any, will you carry out?	Which program activities is the adapter expected to carry out?
Materials	Will you provide any job aids like templates, tools, or handouts?	• Is the adapter responsible for developing their own materials? • Adapt materials to their local community?
Facilities and Local Partnerships	Will you support partners to secure facilities or develop local partnerships?	• Is the adapter responsible for securing a site or facility to do the program? • Is the adapter responsible for building local partnerships?
Staff Functions	Will you provide staff role descriptions? Help train staff?	• Are new staff roles needed? • Will the adapter recruit and train any new roles?
Business Systems or Equipment	Will you provide business systems like software licenses, or equipment like tablets?	• Is the adapter expected to bring their own business systems or equipment?

↓ *cont.*

Data	• What information or data do you need to collect centrally? • Do you need to analyze and report this information or data?	• What information or data needs to be collected at a local level? • Does the adapter need to analyze and report this information or data?
Continuous Learning	Will you share lessons learned and new improvements with adapters? How?	Will adapters share lessons learned and new improvements back to you? How?

EXAMPLE

This is an example of a program that is using a "work directly with others" scaling approach.

Area	You	Adapter
Program Activities	Create event topics	• Select and schedule local events • Promote upcoming events • Host event • Share follow-up materials with participants
Materials	• Share example facilitation guide • Share example workbooks	Customize facilitation guide and workbooks to group needs
Facilities and Local Partnerships	None	Identify and secure location for group events
Staff Functions	• Provide example job description for lead facilitator • Train lead facilitators in orientation sessions	• Identify at least 2 individuals to be lead facilitators • Lead facilitators attend orientation session
Business Systems or Equipment	Share standardized Google forms for attendance and post-event feedback	• Provide tablet or laptop for participants to check in • Capture attendance and post-event feedback in google forms
Marketing	Provide example communication materials	Share communication materials with local synagogues
Data	Collect and analyze attendance and post-event feedback across all communities	Send attendance and post-event feedback on monthly basis
Continuous Learning	Organize and lead on quarterly partnership call to share lessons learned	Participate in quarterly partnership call to share lessons learned

STOP AND THINK

Part 1: Use the below table to fill out the division of roles and responsibilities for your program.

Area	You	Adapter
Program Activities		
Materials		
Facilities and Local Partnerships		
Staff Functions		
Business Systems or Equipment		
Marketing		
Data		
Continuous Learning		

Part 2: Continue to revise roles and responsibilities until your answer is 'yes' to the following two questions:

1. Is it realistic that adapters will be able to take on each of their responsibilities?
2. Do the responsibilities above cover all the crucial elements of your program?

DEFINING ADAPTER PROFILES

This section outlines the minimum requirements that other individuals or organizations will need in order to adopt and take on the program in their community.

WHY DO I NEED TO THINK ABOUT THE ADAPTER PROFILE?

- Clearly outlining the elements helps other individuals or organizations evaluate their own fit
- Working with the right individuals and organizations helps maintain the quality and impact of the program in a new community
- You may find there is a need to select or screen out individuals or organizations

DEPENDING ON YOUR PROGRAM, ADAPTERS MIGHT BE:

- A regional office that your organization already has or will set up
- A school, synagogue, senior center, or other community organization
- Another nonprofit or organization
- An individual

GUIDELINES FOR DEFINING YOUR ADAPTER PROFILE:

Use the following elements to create a list of critical and desirable criteria for others that adopt and take on the program.

Element	Description
Shared values and mission	How closely do they need to be aligned with you in mission, or perhaps more broadly, values, approach, or ethos?
Shared ideology	How closely do they need to be aligned with you in ideology?
Financial situation	Do they need to have any specific financial practices, secured funding for taking on the program, or expected funding?
Technology	Do they need to be able to support with certain levels of technology, or have software licenses?
Legal structure	Do they need a specific legal status?

↓ *cont.*

Equipment and facilities	Do they need to have a venue, operating space, equipment or requisite materials?
Staff structure	Is there a minimum number of staff or management structure to take on the program?
Staff or individual capacity	Is there a minimum amount of staff or individual time that should be dedicated in order to deliver the program?
Staff capabilities	Do staff or individuals need specific experience, certifications, or other qualifications?
Qualifications and reputation	Any requirements about the adapter's previous track record and experience?
Existing relationships	Any relationships or access to networks that the organization or individual must already have in place?
Leadership	Are communal leaders enthusiastic and appreciate the potential of your programs?

Here's an example of what the adapter profile might look like for a Jewish teen leaders fellowship:

Elements	Critical Criteria	Desirable Criteria
Shared values and mission	Committed to empowering teens as leaders	
Legal structure	Currently incorporated as or in the process of becoming a 501(c)3	
Equipment and facilities	Secured venue for teen groups to meet in-person	Area to store materials between sessions
Staff capacity	Capacity to devote 10 hours a month to prepare and facilitate sessions	
Staff capabilities	Experience working in with middle-school aged teens	Local connections to diverse speakers
Existing relationships	Relationships or existing programming in at least three middle schools	

STOP AND THINK

Use the below table to write out your critical and desirable criteria.

Part 1: For each element in the table below, consider whether they are critical or desirable criteria for others that will adopt and take on the program in their community.

Element	Critical Criteria	Desirable Criteria
Shared values and mission		
Shared ideology		
Financial situation		
Technology		
Legal structure		
Equipment and facilities		
Staff structure		
Staff or individual capacity		
Staff capabilities		
Qualifications and reputation		
Existing relationships		
Leadership		

Part 2: How will you verify or assess each criterion for individuals or partners? Is it reasonable to expect that other individuals or organizations can meet all of the criteria? If not, are there any criteria that are desirable, but not critical?

DETERMINING START-UP AND ONGOING SUPPORT

Start-up support defines everything that you will provide to adapters initially, so that they can successfully adopt and set-up the program or intervention in their community. Examples of start-up components include initial training, launch materials, or financial incentives.

Ongoing support defines everything you will provide to adapters on a consistent, ongoing basis so that they can successfully deliver the program or intervention in their community. Examples of ongoing support may include direct coaching, refresher trainings, or access to technological resources.

WHY DO I NEED TO THINK ABOUT START-UP AND ONGOING SUPPORT?

- You can encourage others to adopt and deliver your program in their community through a compelling package of support
- Those taking on the program can clearly understand what support they will receive
- Those taking on the program can clearly understand what support they won't receive, which helps them anticipate what additional resources they will need to provide themselves.

GUIDANCE TO DEFINE START-UP AND ONGOING SUPPORT

1. Start by reflecting on the 'core' essential elements that you defined in the previous section "Capturing the core components of your program". What support will new adapters need to be able to launch each essential core component?
2. Next, reflect on the roles and responsibilities for others who adopt the program. Is there any other support adapters will need to carry out their responsibilities?
3. Choose what type of support you will provide to adapters. The right support varies widely based on your program, and your chosen model. Determine what support will be provided just at the beginning, and what will be provided an ongoing basis.

↓ cont.

QUESTIONS TO CONSIDER

1. Will the support provided be enough to enable another individual or organization to take on and adapt the program in their own community?
2. Can elements of the start-up package be provided remotely, or do they require being in-person?
3. Should this support be provided by you, an external party, or through peer-to-peer support?
4. If there are multiple people or organizations who adopt the program, will they be able to interact and communicate with one another through regular meetings, forums, or online channels? And if so, who will convene, initiate, and monitor those communications?

EXAMPLE

Below is an example of startup and ongoing support with a Jewish teen leadership program.

Start-up Support	Ongoing Support
Support • Marketing support to recruit first fellowship participants • Grant template and assistance writing grant for program **Training** • Initial 3-day training for facilitators **Tools or Equipment** • Example exercises for participants to reflect on each group session • Grant template language	**Support** • Remote help in case there are difficulties in setting up the speakers or running the group sessions • Marketing support to recruit fellowship participants and peer leaders • Publicity by including new program on organization’s website **Training** • Biannual 2-day refresher training for facilitators **Tools or Equipment** • Updated versions of materials

If you find that there is not a lot of ongoing support required for others to effectively take on and adapt the program, it’s a good indication that you want to choose a model where you share expertise with others (open sourcing, training, or loose networks). If you find that others will need some, or substantial ongoing support to be successful, it’s a good indication you want to choose a model where you work directly with others (association, accreditation, or strategic partnerships).

STOP AND THINK

Part 1: Use the below table to write out your start-up and ongoing support

Start-up Support	Ongoing Support
Support:	**Support:**
Training:	**Training:**
Tools or Equipment:	**Tools or Equipment:**

Part 2: What does your start-up and ongoing support suggest about the type of model you should choose?

ESTIMATING COSTS AND FUNDING STRUCTURE

Estimating Costs is the practice of outlining the initial and ongoing costs that will be needed for your model to succeed.

Funding structure is the arrangement where you determine who is responsible for covering these costs. At this stage, hopefully you have an idea of the scale strategy you aim to pursue. This stage will help you resolve what your efforts will likely cost, and who should cover those costs.

WHY DO I NEED TO THINK ABOUT ESTIMATING COSTS AND FUNDING STRUCTURE?

- Ensures that the model you are designing is financially viable
- Sets expectations early on for what costs are likely involved, and who should cover those costs
- Identifies and articulates a realistic financial request to funder partners

GUIDELINES FOR ESTIMATING COSTS

There are four main buckets to consider when estimating costs:

1. **Initial costs for you:** What are the initial costs that you will incur to prepare your program for others to adapt? What are the initial costs that you will incur when supporting others to start-up or launch the program?
2. **Initial costs for adapter:** What are the initial costs for an adapter to start-up or launch the program?
3. **Ongoing costs for you:** What are the ongoing costs that you will incur when supporting others to deliver the program?
4. **Ongoing costs for adapter:** What are the ongoing costs for an adapter to continue delivering the program?

Initial and ongoing costs vary and depend on the model you have selected. Some models, such as open-source or loose networks, require less of your ongoing involvement and therefore won't have many ongoing costs for you. Models that work directly with others or extend reach directly will have higher initial and ongoing costs.

Common costs that fall into each of these buckets include:

	You	Adapter
Initial Costs	• Staff time for initial meetings and trainings • Staff time to develop operational manuals or other job aids • Staff time to provide advisory services • Direct costs for start-up program materials (including marketing materials, equipment, or tools)	• Recruitment of new staff if needed • Staff time and direct costs for initial marketing • Staff time to adapt materials to local community context • Direct costs for start-up program materials (including marketing materials, equipment, or tools)
Ongoing Costs	• Staff time for ongoing coaching support • Staff time to provide refresher trainings • Recurring direct costs like licenses	• Staff time to deliver the program • Direct costs for ongoing program materials (food and drink, clothing, etc.) • Recurring direct costs for equipment or facilities

ESTIMATING INITIAL COSTS

You need to consider the costs to both you and your adapters of getting a new program to the point where they are ready to begin operations. List the different elements of support the program will need to allow new adapters to get up and running (see earlier section on “core” and “start up and ongoing support”) and how much each will cost to provide. Decide whether you want to charge adapters for the cost of this initial support and how much. We recommend that you aim to break even on start-up costs.

Next, list the additional costs that an adapter will incur in starting up your program. If you expect your adapter to be an existing organization, then they may already have resources that can be used and their costs may be limited. An individual starting from scratch may have to buy equipment, rent facilities, etc. making it more expensive. Think about whether the total start-up cost to a new adapter is reasonable. Will they have the money themselves; will they be able to fundraise for it? In some cases, you may want to help new adapters fundraise for part or all of their start-up costs, however, an adapter’s willingness to fundraise is a good initial indication of their commitment.

ESTIMATING ONGOING COSTS

There are a number of ways that money can flow between adapter and originator on an ongoing basis.

> - **Originator to adapter:**
>   - **Central fundraising/large contracts:** You may wish to raise money centrally for projects that will be delivered locally by your network of adapters. This type of arrangement is more likely in open-sourcing, strategic partnerships, or loose network models where you may provide a financial incentive for adapters.

- **Adapter to originator:**
  - **Fee for service:** You may want to charge adapters for services provided. For example, if you are using training or consultancy models, you might want to charge for the cost of delivery.
  - **Ongoing fees:** You may want adapters to pay an ongoing fee to you. For example, if you are using Association models, you might want to charge an annual membership fee.
  - **General income:** If expanding reach directly through branching, all income is likely to come back to you at the center anyway, before then being redistributed according to local and central budgets.

- **Pricing Strategy**
  - There are a number of strategies to employ when setting fees. Some of these will require desk-based market research or speaking with existing or potential adapters. You can use one of the following, or a combination of the following strategies to help you:
    - **Value-based pricing -** setting prices based on an adapter's perceived value of a product or service.
    - **Ability to pay -** charging based on what the adapters might be able to afford. Explore the profile of the adapter you are seeking and consider what that adapter might be able and willing to pay.
    - **Market based pricing -** setting prices based on what other similar types of programs cost.
    - **Cost recovery -** charge directly what the scaling operations costs your organization, so that you break even.
    - **Cost-plus or a target return on investment -** set a price based on your cost plus a set percentage, or enough to achieve your target return on investment.
  - Build in flexibility and be open to adjustments. As you pilot your model, you may discover your costs aren't that high and it may be helpful to lower your price. You may realize your costs are much higher and you need to increase your price. You may discover no one is able to pay for the full program, and then need to figure out alternative ways of funding or subsidizing the costs.

GUIDELINES FOR DETERMINING FUNDING STRUCTURE

Replication can be funded by a combination of your program, an external funder, or the adapting organization.

EXAMPLE

	Originator program/ funder funds	Joint/funders fund together	New adapter/funder funds
Pros	Originator coordinates the adapted network and has transparency over finances	• Buy-in from the adapter • Collaboration could open up opportunities	• Buy-in from the adapter • Less investment and time from originator required
Cons	• Requires significant effort and time from originator • Less buy-in from the adapter • May be resistance from originator's funder community	Requires coordination between adapters and different funders	• Could limit potential adapters if their funding is restricted • Could be competing for same pool of national funds

Questions to consider in order to determine your funding structure:

Originator program/ funder funds	Joint/funders fund together	New adapter/funder funds
Do you have the time and resources to invest in funding new communities to take on the model?	• How much time and resources will it require to coordinate funding for supporting adapters? • Is there potential for coordinating fundraising together from local or national funders? Are there advantages to this?	• Is it possible that adapters would be competing for the same pool of funds? • Are adapters capable of raising funds for the program and any fees for support?

Here's an example of what the initial and ongoing might look like for a Jewish teen leader fellowship that choses to use a Strategic Partnership model:

	Originator	Adapter
Initial costs	• Staff time to provide advisory services • Venue and logistical costs to host facilitator's initial training	• Staff time to speak with middle schools and distribute marketing materials • Staff time to screen application responses and select fellows • Travel costs for facilitator initial training
Ongoing costs	• Staff time for ongoing coaching support • Staff time to provide ongoing support • Licenses for the application that hosts feedback forms • Venue and logistical costs to host refresher trainings	• Staff time to schedule speakers and facilitate discussion • Speaker fees • Costs to rent the room • Materials for creative exercises following each session • Travel costs for refresher trainings

STOP AND THINK

Take some time to estimate initial and ongoing costs, as well as to choose what type of funding structure makes the most sense for you, using the below exercises.

Part 1: Use the guidance below to estimate the initial and ongoing costs to you and the adapter.

1. List the different elements of support the program will need to allow new adapters to get up and running and on an ongoing basis (see earlier section on "core" and "start up and ongoing support")
   - Estimate how much each support element will cost to provide
   - Decide whether you want to charge adapters for the cost of this support and how much.
2. Now list the additional cost elements that an adapter will incur in starting up and running your program. Estimate how much each element might cost.

	You			Adapter	
	Elements	Ballpark Cost	Cost passed to adapter	Elements	Ballpark Cost
Initial costs					
Ongoing costs					
Total estimated cost	-	$	$	-	$

3. Think about whether the total initial and ongoing costs to a new adapter are reasonable. Will they have access to funds themselves already? Will they be able to fundraise for it?

Part 2: Now that you have considered your costs and what will be passed on to the adapter, here is another example estimating costs and the funding structure between an originator and adapter with a couple of additional considerations:

- Revenue sources for both originator and adaptor. In this example, the originator has revenue sources from funders and adapters, while the adapter has revenue sources from the originator, funder, and end participants.
- Multiple years of financial flows. In most adaptation models, costs and revenue will change from year to year for the first few years and then stabilize. For example, in this model, the originator's costs will decrease year by year, as adapters require less support.

This is a funding structure where both originator and adapter are paying for adaptation. The originator is covering most of their costs in preparing for scale and training the adapter, while the adapter is paying for operating the program on a continuing basis.

EXAMPLE

Costs

	Originator		Adapter	
	Year 1 (start up)	Year 2 (ongoing)	Year 1 (start up)	Year 2 (ongoing)
Operational staff	$20,000		$20,000	$30,000
Training for students	$5,000	$2,500	$5,000	
Ongoing advisory		$7,000		$7,000 (Fee for advisory services)
Marketing to participants	$5,000		$5,000	$5,000
Materials and equipment	$5,000		$10,000	$1,000
Facilities				
Grant for adapter	$5,000		$1,000	
Total costs	$40,000	$9,500	$41,000	$44,000

Revenue

	Originator		Adapter	
	Year 1 (start up)	Year 2 (ongoing)	Year 1 (start up)	Year 2 (ongoing)
Revenue from funder	$40,000	$2,500	$26,000	$34,000
Revenue from adapter		$7,000 (Fee collected for ongoing advisory)		
Revenue from originator			$5,000 (grant provided from the originator)	
Revenue from participants			$10,000	$15,000
Total Revenue	$40,000	$9,500	$41,000	$49,000

If it is applicable, you can also add in financial flows for additional adapters for future years. Ask yourself: how many adapters will you support each year in order to reach your impact goal? Will an increasing number of adapters deliver economies of scale? e.g. could you combine training sessions to multiple adapters, lowering the costs of training for your organization?

Part 3: Tailor the financial model to your program and your adaptation model, and use it as a tool to pressure test the model and ultimately help you reach your impact goal.

DEFINING DATA NEEDS

Data needs refer to any metrics or processes that you or adapters want to collect and analyze in order to understand the outcomes and impact of the program, as well as learn and adapt.

WHY DO I NEED TO CONSIDER DATA NEEDS?

- Assess the success of your program in another community, and potentially identify needs for additional support
- Benefit from lessons learned across communities
- Ensure data collection expectations and practices are clear to and manageable for adapters
- Communicate impact to potential funders and partners

GUIDELINES FOR DATA NEEDS

The model you have selected will determine what kind of data you will likely want and be able to collect from adapters. In models like open-sourcing, training, consulting, or loose networks, you likely do not have an ongoing relationship with adapters, and it is typically more difficult to request data.

QUESTIONS TO CONSIDER

1. **Data Needs** – What is the data needed for? Reporting to funders? Understanding progress toward your impact goal? Understanding where the program is working well, or where things need to be improved?
2. **Key Criteria** – What data do you collect currently to measure the impact of your program? What are the key performance indicators that will allow you to understand whether others are successfully able to adapt your program (Is it number of participants, frequency of programming, benefits to the lives of teenagers, etc.)?
3. **Data collection and analysis process** - Considering the adapter profile, can a potential adapter conduct the data collection and analysis process? How much of a burden is this for the adapter?
4. **Data collection systems/tools** – Are there any restrictions or preferences for the format in which you will receive the adapter's data? Will it require the adapter or your organization to institute any new systems or tools?
5. **Continuous Improvement** – How will you interact with adapters to share lessons learned with each other across communities?

Once you have determined data collection and reporting needs, you should decide who is responsible for collecting, analyzing, and reporting the data. Revisit and update your roles and responsibilities accordingly.

Here's an example of what the data needs might look like for a Jewish teen leader fellowship that choses to use a Strategic Partnership model:

- **Data Needs:** Impact metrics will be included in biannual reporting for funders. Desire to gain an understanding of what is working well and make strategic choices about where to put resources.
- **Key Criteria:** Collect "current engagement" metric classifying teens by their engagement in Jewish programs in the past 12 months as well as the outcomes for the 14 Outcomes that Positively Impact the Lives of Jewish Teens framework.
- **Data collection and analysis process:** Minimal burden on adapters as most organizations are already using some form of a survey to collect data from programming.
- **Data collection systems and tools:** Adapter and originator will use the same survey format for teens and parents involved in the teen leader fellowship.
- **Continuous improvement:** Adapter and originator have an hour-long virtual meeting with each other on a monthly basis to share ideas.

STOP AND THINK

Take some time to write out your data needs, using the table below.

Consider – what is the process you will use to share data? Are there any considerations for privacy and confidentiality? Visit **here** for shared frameworks, tools, and data collection instruments for Jewish teen engagement

	Your responses
Data Needs	
Key criteria	
Data Collection and Analysis Process	
Data collection systems/ tools	
Continuous improvement	

DESIGNING YOUR MODEL

In Section 2.3, you answered a few key questions about your program and scale goals, and selected a model that was the best fit for your program. Continue to use this framework to design and refine it, but remember the chosen model is a reference, and you are designing a customized model for scaling your program.

Your model is like a puzzle that is pieced together with the organization's identity, program's goals, and operational elements. The following figure outlines potential pieces of the puzzle, many of which have already been covered in this toolkit.

The first five pieces in gold: Problem Definition, Vision, Mission, End game, Scale objectives, and Impact goal define your organization's identity and goals. The remaining components in grey are operational pieces to the model. Note that some of these components may not be relevant to your program, and will not need to be defined. Also, many of these pieces feed into each other. For example, designing your Core feeds into how you define Roles and Responsibilities.

DESCRIPTION OF MODEL COMPONENTS

Model component	High level description
Problem Definition	The problem(s) the organization/program is trying to solve
Vision	World the organization hopes to see
Mission	What the organization is trying to achieve
End Game	The specific change the program is trying to make
Scale Objectives	There are two types of scale objectives: 1) Social objectives associated with programmatic impact and 2) Business objectives that are related to the organizational goals, such as financial sustainability
Impact Goal	Defines the impact the program wishes to achieve, with measurable and realistic targets
Core	Essential elements of the program or organization which create impact in your community, and therefore should be included anytime the program is adopted by another community
Roles and Responsibilities	Outline of which activities will be completed by you and which will be completed by others that adapt your program
Initial and Ongoing Support	Everything that you will provide to adapters initially and on an ongoing basis, so that they can successfully adopt and set-up the program
Offer	What value you are offering adapters through the program and corresponding support
Adapter Profile	Minimum requirements that other individuals or organizations will need in order to adopt and take on the program in their community
Potential Adapters	Consideration of the existing market for organizations or individuals that could potentially take on the program; a way to pressure-test the Adapter Profile
Quality Management	Measures put into place to ensure high quality execution of the program
Impact Evaluation and Data	Metrics or processes that you or adapters want to collect and analyze in order to understand the outcomes and impact of the program, as well as learn and adapt
Brand and Marketing	Determining how you and your adapter will brand and market the program (for example, cobranding or separate branding)
Governance	The framework for decision-making between the originator, adapter, and if applicable, the adapter network
Legal	Legal implications of a potential model, and what, if anything, will be done to protect the program's intellectual property and reputation
Costs and Funding Structure	Outlining the initial and ongoing costs that will be needed for your model to succeed, as well as the arrangement where you determine who is responsible for covering these costs

As you begin to pilot your model, continually revisit these elements and refine them as you learn what works.

CREATING A TOOLKIT

A toolkit provides detailed information about how to successfully implement a program or intervention as well as practical resources, such as sample marketing materials. A well-designed toolkit can bolster quality and consistency of the program, and can be an invaluable tool for equipping others to take on the program or training new staff.

WHY CREATE A TOOLKIT?

- Set a standard and ensure quality and consistency for your program
- Provide a single source of information for people to refer back to as they carry out the program
- Help new staff or others taking on the program to get up to speed quickly

DEFINING THE TOOLKIT PURPOSE

1. **Define your end user** – Is the toolkit going to be used by program directors or individuals who manage or coordinate the program? Staff who deliver specific aspects of the program?
2. **Determine the context in which end users interact with the toolkit** – Will it be available for anyone to download and use on their own? Will it be provided after an initial round of training? Or supplemented with ongoing coaching?
3. **Determine when and how the user needs to reference information** - Are users going to reference the toolkit online, or use it as a physical job aid? Is the toolkit best kept as one document or divided it into different sections according to who needs to implement each aspect of a program?
4. **Consider the degree of detail needed for the toolkit** – What is the right length and scope given your program and degree of flexibility in program implementation? The level of standardization can range from broad design principles to fully specified services and procedures. Finding the right degree is a balancing act that should reflect the specific program and the importance of adapting to local context.

DETERMINING TOOLKIT CONTENT

Toolkit content should reflect the aspects of programming that are required to drive impact.

1. Start by reflecting on the 'core' essential elements that you defined in the previous section "Capturing the core components of your program". For each core element, consider what an adapter would need to know in order to successfully deliver the element.

2. Reflect on the roles and responsibilities for others who adopt the program. Consider what an adapter would need to know in order to fulfill their responsibilities.

As a reference point, toolkits typically cover the following content:

Introduction	**Set-up**	**Delivery**	**Management**
Set context about the program, and how the toolkit is intended to be used	Provide guidance for planning or set-up activities prior to running the program	Provide guidance for day-to-day operations of the program	Administrative policies or processes that are required for the program
Typically covers: • Index • Introduction • Objectives of the program • Mission • Values • Glossary of terms	Sections may include: • Securing venue and equipment • Setting up systems or events • Planning schedules • Marketing the program	Sections may include: • Steps needed to run the program • Processes for collecting and/or reporting data • Processes for quality management	Sections may include: • Safeguarding • Confidentiality • Learning and development policies • Health and safety policies • Brand guidelines

WRITING THE TOOLKIT

It's important to keep a consistent structure through a toolkit. Add reference links so it is easy for the user to find specific information they need at a point in time. Use bullets and checklists rather than long-form writing to make content easy to understand.

The following is a suggested format for each section within your toolkit:

- **Introduction** - Explains upfront context for the section, why it is important, and defines any key terms.
- **Checklist** – Outlines a concise list of bullet points for everything that should be done within a specific section. In many cases, this make take shape as a step-by-step process. Where possible, include specifics about which role is the primary actor for each step.
- **Lessons learned and resources** – Describes any tips that other communities may benefit from when adapting and taking on the program. Typically, this includes information on best practice, examples, and suggested techniques. This section may also link to external resources.

Link to sample toolkits

CONCLUSION

We hope this toolkit enabled you to explore and understand key concepts related to scaling in the Jewish community. While scale is an exciting topic in the nonprofit sector, taking meaningful steps to carefully thinking through the upfront decisions are critical for success.

To briefly recap, this Toolkit was designed to enable you:

1. **First, to learn about the potential models you can pursue:** Assessing the right direction for you, based on the on the level of control you wish to have, and the speed by which you hope to reach new communities.

2. **Second, to choose the model that is best suited to your goals:** Defining your goal, assessing community demand and funder appetite, and thinking about the responsibilities you want to have in scaling.

3. **Third, to prepare the necessary elements for sustainable and effective scaling:** Thinking through a number of exercises meant to help you think through critical elements of your current programming in order to build plans for scale. This included capturing the core components of your programming and determining roles and responsibilities, an adapter profile, financial structures, and data collection needs. Finally, the Toolkit section guided you in how to package these decisions into your own toolkit, in order to enable quality and consistent scaling of your program.

As you progress in the development and implementation of your scale plans, remember to revisit and revise your decisions. It is important to build in learning throughout the implementation process, so you are able to continuously reflect on and lean into what's working, and make improvements where necessary.

We look forward to seeing where your learnings about scale take you! If you have questions, we encourage you to reach out to the Jewish Teen Funder Collaborative. Please contact Rabbi Dena Shaffer, Director of Learning and Engagement at 585-472-5888 or at dena.shaffer@JewishFederations.org.

Good luck!