SOCIAL INNOVATION BUSINESS TOOLBOX

FROM ROOTS TO RESULTS

Stronger SI Concepts
Collecting Evidence

Methods, Tools & Instruments
Theoretical Foundation

Continuous Stakeholder Dialogue

Modelling & Testing
# CONTENT

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTRODUCTION</td>
<td>4</td>
</tr>
<tr>
<td>WHAT BUSINESS MODELS ARE BEHIND SOCIAL INNOVATIONS?</td>
<td>4</td>
</tr>
<tr>
<td>WHAT IS THE SIMPACT SOCIAL INNOVATION BUSINESS TOOLBOX?</td>
<td>5</td>
</tr>
<tr>
<td>SI BUSINESS TOOLBOX OVERVIEW</td>
<td>8</td>
</tr>
<tr>
<td><strong>TOOL 1</strong> CHECKING YOUR CHALLENGE</td>
<td>8</td>
</tr>
<tr>
<td><strong>TOOL 2</strong> PROBLEM DEFINITION</td>
<td>11</td>
</tr>
<tr>
<td><strong>TOOL 3</strong> SWOT ANALYSIS</td>
<td>12</td>
</tr>
<tr>
<td><strong>TOOL 4</strong> CUSTOMER JOURNEY</td>
<td>13</td>
</tr>
<tr>
<td><strong>TOOL 5</strong> PERSONAS</td>
<td>15</td>
</tr>
<tr>
<td><strong>TOOL 6</strong> TARGET GROUP</td>
<td>17</td>
</tr>
<tr>
<td><strong>TOOL 7</strong> IDEA SELECTION</td>
<td>19</td>
</tr>
<tr>
<td><strong>TOOL 8</strong> SERVICE BLUEPRINT</td>
<td>20</td>
</tr>
<tr>
<td><strong>TOOL 9</strong> IDEA CARD</td>
<td>22</td>
</tr>
<tr>
<td><strong>TOOL 10</strong> THINKING HATS</td>
<td>24</td>
</tr>
<tr>
<td><strong>TOOL 11</strong> VALUE PROPOSITION CARD</td>
<td>26</td>
</tr>
<tr>
<td><strong>TOOL 12</strong> LOGIC MODEL</td>
<td>27</td>
</tr>
<tr>
<td><strong>TOOL 12</strong> RESOURCE ASSESSMENT</td>
<td>29</td>
</tr>
<tr>
<td><strong>TOOL 13</strong> MOTIVATION MATRIX</td>
<td>31</td>
</tr>
<tr>
<td><strong>TOOL 14</strong> STAKEHOLDERS MAP</td>
<td>33</td>
</tr>
<tr>
<td><strong>TOOL 15</strong> CASH FLOW PROCESS</td>
<td>35</td>
</tr>
</tbody>
</table>
Welcome to the SIMPACT Social Innovation Business Toolbox!

This toolbox was created to help support the main players of the social innovation (SI) space. If you are actively creating solutions to today’s greatest societal challenges or supporting these solutions through intermediary services, then this toolbox is for you. The toolbox provides tools that all actors can use to create, develop, measure and assess SIs.

What business models are behind social innovations?

In the face of growing societal challenges, SIs craft unique solutions to unmet social needs. Having multiple objectives, SIs requires business models that differ from traditional models. SI business models are: (i) configured around finding complementarity between antagonistic assets (resource combinations that from the start hinder the commercialization or marketing of a product or service) and seemingly conflicting logics; (ii) often structured around a divergence in the allocation of cost, use and benefit leading to multiple value propositions; (iii) modelled on multi-actor/multi-sided business strategies; (iv) developed as frugal solutions and through actions of bricolage.

What does this mean?

Social innovations typically start their solutions with assets that are not chosen based on their complementarity to the economic mission of reducing costs to create a larger profit but rather the assets are often at the core of the social mission. One can think for example of the challenges that employing the differently abled, the long-term unemployed or ex-prisoners could present in running an efficient operation, which might also entail hiring specific figures to ease entry or re-entry into the labour force.

SIs target a diverse range of customer segments that include: beneficiaries, customers and financing supporters. Unlike traditional business models, in SIs those who pay for the innovation (welfare systems, donors, customers) may not use it and may not benefit from it (or at least not directly). Value propositions in SIs are thus tailored to target each in the aim of producing and capturing social and/or economic value: for beneficiaries (to produce social value and at times capture economic value), for customers (to provide social value and capture economic value) and for donors/funders (to provide/produce social value and gain financial support). As a result of the multiple customer segments and value proposition, SI business models are multi-actor, with social value being the cornerstone of the model.
Social innovators also work under extreme resource scarcity, thus keeping the end game on creating a business model that drives meaningful change while being cost-effective and sustainable is king.

What is the SIMPACT Social Innovation Business Toolbox?

Who is it for?

→ Social Innovators: individuals or groups who have found solutions to the mounting social challenges facing our societies today.
→ Intermediaries: organizations or experts who support the development of social innovations through consulting and incubation services and network facilitation.

What’s in it for you?

→ Social Innovators: this toolbox will help you test and assess your idea, develop and/or consolidate your solution and measure your impact.
→ Intermediaries: this toolbox provides useful instruments to use in each phase of developing a social innovation.

What’s the process?

Figure 1: SIMPACT Social Innovation Business Model
The SI Business Toolbox is designed to facilitate developing and/or improving SI business models. That is why we have designed the toolbox within the framework of our social innovation business model canvas. The canvas above is therefore more than one of the many analytical devices or tools but rather the gateway for the design toolbox as the end objective.

• Preliminary Phase: Idea Drafting
  - A limited set of very simple and non-resource intensive tools, meant to support innovators in the idea drafting phase.
• Development and Startup
  - A larger set of more complex tools, meant to provide intermediaries with instruments to support the development of social initiatives.

How do you start?

If your solution is already developed, find your weakest point and start there! Make sure to adopt a beginner’s mindset, make it tangible, document everything and iterate!

If you’re just at the beginning, read the explanation below of what a business model canvas is and the process to follow.

What is a business model canvas?

A business model canvas is a tool used to draft and construct in a fast and iterative manner the mechanisms in which an organization/enterprise creates, captures and delivers value. It is composed of a set of boxes representing the principle elements of the business and their interwoven relationships.

In our revised business model adapted for social innovation, there are 10 sections to be completed as follows. It should be noted that the process can start at any point and that ours is merely a suggested course.

1. Social Problem/Social Need and Existing Alternatives: identify and analyze the social problem at hand and benchmark existing solutions to find out what is and what is not working.
2. Beneficiaries and Financing Supporters: identify, segment and understand your beneficiaries, customers and financing supporters (donors, investors and funders).
3. Solution/Governance: ideate or describe the solution to the social problem/need and the governance model.
4. Social/Commercial Value Proposition: formulate the social (i.e. the value created for beneficiaries) and commercial value proposition (i.e. the value created for paying customers/investors).
5. Relationship and Channels: describe how you reach your target beneficiaries, customers and/or investors.
6. Social Impact Measurement: what indicators can be used to measure the impact of the solution.
7. Key Activities/Key Resources: define what key activities and resources are needed to support the innovation.
8. In-kind Supporters and Key Partners: list key partners who provide support, resources and services that foster the growth of the solution.
9. Cost Structure & Revenue Streams: list what costs are created and how revenues will be generated (i.e. memberships fees, freemium/premium, product sales, etc.).
10. Surplus: indicate where surplus will be invested if generated.
What tools are in the kit?

(Idea Drafting: in green. Startup and Development: in grey.)

**Social Problem/Social Need and Existing Solutions**
- Checking your Challenge*
- Problem Definition
- SWOT Analysis*

**Beneficiaries and Financing Supporters**
- Customer Journey
- Personas*
- Target Group*

**Solution/Governance**
- Idea Selection
- Service Blueprint*
- Idea Card*
- Thinking Hats

**Social/Commercial Value Proposition & Relationships and channels**
- Value Proposition Card

**Social Impact Measurement**
- Logic Model*

**Key Activities/Key Resources**
- Resource Assessment*

**In-kind Supporters and Key Partners**
- Motivation Matrix*
- Stakeholders Map

**Cost Structure, Revenue Streams and Surplus**
- Cash Flow Process*

* Development and startup tools to be used with the help of an intermediary.
SI BUSINESS TOOLBOX OVERVIEW
What is it for?

“Checking your Challenge” is a great tool for innovators to test if their challenge is:

- daring (i.e. it is not easily solved while having the potential of impacting the lives of many people);
- feasible (i.e. the team has easy access to beneficiaries, supporters and partners and hence the team can influence the problem); and
- scalable (i.e. the challenge is widespread and not limited to the single community).

Challenges that are framed well from the beginning are more likely to bring about impactful solutions. The “Checking your Challenge” tool helps narrow down a broad topic.

How to use it?

Start by finding out if the challenge is feasible by answering the related questions with post-it notes. Take time to really answer the questions in each section, asking yourself after each response: how? Proceed in the same manner, testing if the challenge is daring and scalable.

References: Design for America’s Process Guide Version 3.2
Do others nod when we tell them about it?
Can we test the problem?
Are local organizations working on the problem?
Can we identify & reach users/beneficiaries?
Can we access the expertise & tools needed to implement our solution?
Are there multiple places across the country where the problem occurs?
Are there foundations, non-profits or companies interested?
Are there a number of existing solutions for the problem?
Are there a wide-scale need?
Is it a need in my community?
Does it tackle a really big problem?
Does the problem appear in national news?
Are we excited about working on this problem?
If we had a minute with the President/Prime Minister, would we talk about this?
PROBLEM DEFINITION

What is the social problem/need and are there existing alternatives?

Complexity: Medium
Time required: 1-2 hours
Material required: pen, post-its
Other: Try to include people who have a good understanding of the social problem and the context in which the solution is to be created.

References: Kimbell & Julier’s The Social Design Methods Menu
Nesta’s DIY Toolkit

What is it for?

Defining a problem is an important step to creating an effective and efficient solution, as what may appear at first to be the problem may actually be the result of an underlying and perhaps even larger problem. This tool allows groups to understand what these underlying factors may be and to contextualize the problem so as to re-frame the problem in a more specific and direct manner.

How to use it?

The tool can be completed individually or in groups. Completing the task in groups however is preferable as the objective of the exercise is to approach the problem from different viewpoints in order to understand and define the problem better. Including stakeholders in the process is another useful idea. The worksheet should be filled out from left to right.

What is the key social problem/need you are addressing and why is it important?
Who is it a problem for?
What social/cultural factors shape this problem?
What evidence do you have that this is a significant problem?
Can you think of the problem in a different way? Can you reframe it?
TOOL 3
SWOT ANALYSIS

What is the social problem/need and are there existing alternatives?

Complexity: Low
Time required: 1 hour
Material required: pen, post-its
Other: Try to include people who have a good understanding of the context in which the solution is to be created.

References: Spider’s Service Design Toolkit
Nesta’s DIY Toolkit

What is it for?

The SWOT Analysis is an analytical tool used to determine the strengths, weaknesses, opportunities and threats that an organization has. It is helpful to perform a SWOT Analysis before the start of the project so as to test the idea or the strategy. The analysis leads to a deeper understanding of the solution’s offer, what opportunities it has and what should be worked on. It can also lead to further ideas on who to ask support from and how to better strategize success.

How to use it?

The tool can be completed individually or in groups for the entire organization or for single projects and ideas. It can be completed in any order but it may prove useful to start by working on the internal factors and then moving on to the external factors. Remember that the analysis is only useful if done with a critical eye, so be open to criticism and share the activity with others!

Strengths
What do you do better than others?
Why are you unique?
What comparative advantages do you have?

Weaknesses
What could you improve?
What should you avoid?

Opportunities
Is there a need?
Do your customer targets prefer something else?
Are there any external changes (policy, technology, etc.) that could help?

Threats
What challenges do you face?
What are your competitors doing?
Are there any external changes (policy, technology, etc.) that are making things difficult?
What relationships are you creating with your customers and what are the channels being used?

Complexity: Medium  
Time required: 2 hours  
Material required: pen

What is it for?

The Customer Journey map is a visual interpretation of the user’s relationship with the organization, service or product. While the story is told from the user’s point of view, it also highlights important moments where the user’s expectations intersect with the organization’s offer. It is a useful strategic tool that keeps the customers, beneficiaries and donors at the center of design decisions, highlighting pain points and opportunities for the organization to create a better user experience and an effective service.

How to use it?

First, individualize the user you will be designing for and map out the main phases of their journey throughout the service. (You can also consult your service blueprint.) Then draw sketches of the phases in the boxes or take pictures and use photo to sketch technology to convert them into sketches. Afterwards, provide explanations of the phases to create a story of the user’s journey. At each step along the way, identify the need that the user has at that moment and the channel or touchpoint through which this is met. Touchpoints pinpoint the intersection between the users of the service and the providers and thus how the user interacts with the service itself. At the end of the activity, detect what the possible pain points are, or rather where the beneficiary, customer or donor may have problems or difficulties using the service. Remember that pain points can also occur before or after the service in terms of their decision to use or re-use the service.
**User Storyboard**
Draw the key steps from the user’s perspective.*

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

**Explain the key steps to create a story.**

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

**Needs**
At each key step, define the main need of the user.

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

**Touchpoints**
Identify or design the touchpoints according to the need.

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

* If you can’t draw, you can take a picture and make use of photo to sketch applications.
T O O L  5

P E R S O N A S

Who are your beneficiaries, customers and financing supporters?

Complexity: Low
Time required: 2 hours
Material required: pen

What is it for?

Personas are fictional characters who embody the archetype of your customer, beneficiary or financing supporter. They are created through exhaustive observation of the customer segment and the drawing together of their shared characteristics, behaviours, motivations, interests, etc. It is a useful tool to really focus on getting to know who you are designing for.

How to use it?

The goal of the activity is to make the persona as accurate as possible and hence as detailed and nuanced as can be. Start by giving your persona a name and identifying from which customer segment s/he comes from. Then move on to describing who s/he is: age, personal background, education level, profession, etc. Now, make a sketch of your persona (remember you can always take a picture and use photo to sketch technology if you can’t draw). Move on to the other sections in any order you’d like and feel free to add more details!

### Who am I?

<table>
<thead>
<tr>
<th>My Interests</th>
<th>My Personality</th>
<th>My Skills</th>
<th>My Dreams</th>
<th>My Social Environment</th>
</tr>
</thead>
</table>

### 3 Reasons for me to engage with you:

### 3 Reasons for me not to engage with you:

<table>
<thead>
<tr>
<th>Persona name:</th>
<th>Customer Segment:</th>
<th>Add picture or drawing</th>
</tr>
</thead>
</table>
Who are your beneficiaries, customers and financing supporters?

Complexity: Low
Time required: 1 hour
Material required: pen

What is it for?

Having a clear idea of who you are serving is pivotal. The customer segment tool is a great way to have an overview of what your beneficiaries, customers and financing supporters looks like and is a great way to start thinking about the various elements of your model: value proposition, customer relationship and impact possibilities.

How to use it?

The first step is to define which customer target you are segmenting and give them a name. Next, draw a picture of them or take a picture and place it in the box. This helps you visualize who you are designing for. The following step is to clearly define their need(s) and how you are meeting that need (value proposition). The next two boxes concern the market size of your offering and how many of them can be reached. Thought should then be given to what kind of relationship will be created between the organization and the group, what is given and received and how it can grow.
What is the group called?

<table>
<thead>
<tr>
<th>What are their needs?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What are you offering them?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How many are there?</th>
<th>How many of them will you reach?</th>
<th>How often will you interact?</th>
<th>What do you get in return?</th>
<th>How can your relationship grow?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TOOL 7
IDEA SELECTION

What is the solution?

Complexity: Low
Time required: 1 hour
Material required: pen, post-its

What is it for?

After coming up with lots of ideas on how to solve the problem, it can be difficult to know where to start and which idea to develop. The Idea Selection tool helps you map out the numerous ideas you have according to their originality and feasibility. The objective of the activity is to select which ideas to focus on, to save for later and to trash completely.

How to use it?

The tool can be completed individually or in groups. Start the activity by jotting down on post-it notes the ideas. Then idea by idea, decide whether it is original or ordinary, feasible or not (yet) feasible and post it accordingly.
What is the solution?

Complexity: High
Time required: 4-5 hours
Material required: pen, post-its
Other: The activity is better done in a group of members coming from all of the areas of activity.

What is it for?

The Service Blueprint is an operational tool that gives an overview of the organization’s operations: key activities, products, services and points of interaction with the intended audience, stakeholders and beneficiaries. The tool is quite useful for planning or improving a service as it demonstrates what is happening along the service line and who is doing what through what means.

How to use it?

The Service Blueprint should involve a representative from each area of the service. The first step is to identify which user you’re planning for: customer or beneficiary if you have more than one. Then plot out the different steps that are taken before, during and after using the service. How do you engage the users and notify them of your service? What happens when they decide to use it? How do you stimulate re-use of the service or properly end the use of the service? These are all questions that must be considered when constructing the blueprint of the service. After mapping out the steps of the user (See Customer Journey tool), the rest of the worksheet can be filled out line by line according to the steps individuated. At the end of the activity, a line of interaction is created between what happens out front and what needs to happen in the back. This allows for successful and planning or improvement if necessary. At the bottom of the tool, there’s room for ideas on how to improve each phase.

### Social Innovation Business Toolbox

#### Before Use

<table>
<thead>
<tr>
<th>Activity</th>
<th>What does the user do?*</th>
</tr>
</thead>
</table>

#### Using the Service

<table>
<thead>
<tr>
<th>Touchpoint</th>
<th>What do the user and employee use for this? [folder, form, etc.]</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Activity</th>
<th>What happens here? [What does the employee/the form/the interface do?]</th>
</tr>
</thead>
</table>

#### After Use

<table>
<thead>
<tr>
<th>Internal Processes</th>
<th>What do your employees do behind the scenes?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>External Processes</th>
<th>What happens in the ecosystem?</th>
</tr>
</thead>
</table>

#### To Develop

* In the case of collaborative services (where there may not be a clear split in activities), the activities of all producers are put in the same box.
TOOL 9
IDEA CARD

What is the solution?
Complexity: Medium
Time required: 2-3 hours
Material required: pen, post-its
Other: It’s best to do this activity in a group setting for more input.

What is it for?
The Idea Card tool organizes in one page your idea: the challenge and needs you are addressing, the solution, what it might achieve and how you will accomplish this. It is an excellent tool to use when presenting your initial idea to stakeholders or future beneficiaries/customers to get a feel of what you’re doing right and what you could improve.

How to use it?
The tool can be completed individually or in groups. Start the activity by defining your challenge and the specific needs that you are addressing. Then think about what it would look like if the challenge were solved. Now that your challenge is framed, clarify your own idea, what it could achieve and how it could be accomplished. Share your final results for feedback!
<table>
<thead>
<tr>
<th>IDEA CARD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What challenge are you addressing?</strong></td>
</tr>
<tr>
<td><strong>If the problem were solved, what would it look like?</strong></td>
</tr>
<tr>
<td><strong>What are the needs?</strong></td>
</tr>
<tr>
<td><strong>IDEA:</strong> « .......................................................................................................................... »</td>
</tr>
<tr>
<td><strong>What does the idea achieve?</strong></td>
</tr>
<tr>
<td><strong>How?</strong></td>
</tr>
</tbody>
</table>
TOOL 10

THINKING HATS

What is the solution?

Complexity: Medium
Time required: 2-3 hours
Material required: pen, post-its
Other: The activity must be done in a group.

What is it for?

Thinking Hats is an interesting tool to use to uncover the many viewpoints that surround a topic. The activity stimulates conversations to take place that are structured around six clear functions and roles. This clear division of roles allows participants to have constructive conversations and discussions on the topic rather than endless, unfocused debates. The six hats to be worn in the exercise (factual, emotional, logical, cautious, out of the box and management) are useful also towards making a topic seem new and different and helps to create a shared understanding between the team.

How to use it?

Thinking hats can be done in two ways:

1. Everyone in the team wears the same hat and conversation is had from the same point of view. Once finished, everyone puts on the next hat.
2. Everyone in the team wears a different hat and conversation is had simultaneously from different points of view. The hats can be switched around during the discussion to force participants to change viewpoints.

Both methods encourage participants to organize discussion in a more effective manner. The hats can be worn in any order but might be easiest if worn in the order suggested in the template. If you don’t have hats, you can always wear badges with the themes on them.
<table>
<thead>
<tr>
<th>FACTUAL</th>
<th>EMOTIONAL</th>
<th>LOGICAL</th>
<th>CAUTIOUS</th>
<th>OUT OF THE BOX</th>
<th>MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TOOL 11
VALUE PROPOSITION CARD

What is your value proposition?

Complexity: Low  
Time required: 1 hour  
Material required: pen

References: Osterwalder’s Value Proposition Design: How to create Products and Services Customers Want.  
Brand Genetic’s Value Proposition Template.

What is it for?

The value proposition card is a useful aid towards constructing a concise and effective value proposition statement. It not only helps you describe your offer to your stakeholders and customer segments but also helps you clarify your objective(s).

How to use it?

The value proposition card should be filled out once for each type of value offered to the targeted customer segment. For example, a card should be filled out for the social value offered to the beneficiaries of the solution, while another should be filled out for the economic value, environmental value, etc. that is being offered and for whom.

Our ___________________________ (service/product/program/initiative/workshop/etc.) helps ___________________________ (target customer segment: beneficiary, paying customer, donor, etc.) who want to ___________________________ (social need/job[s] to be done) by ___________________________ (verb e.g. reducing, avoiding, eliminating, etc.) [customer pain] and ___________________________ (verb e.g. improving, increasing, enabling, etc.) [customer gain] (unlike ___________________________) [competitor, actual provider].
TOOL 12

LOGIC MODEL

What is your social impact?

Complexity: High
Time required: 3-4 hours
Material required: pen, post-its

What is it for?

Creating a logic model is a useful framework to evaluate effectiveness of a program. They can also be used for strategic purposes when planning and implementing a solution, as it assesses the “if-then” relationships between the inputs, outputs, outcomes and impact of a program. The logic model not only helps you to better articulate and align your activities to your bigger impact objective, it also allows you to spot any risk by identifying any underlying assumptions made along the way. The tool can also be used in team building to allow team members to understand their contribution to the larger mission.

How to use it?

The first step in creating your logic model is to jot down what you’re putting into the program: staff time, money, material, information, etc. The second step is to think of what you are delivering and to whom. The next step is to determine the outcome of your investment and activities. Outcomes are short-term changes that result from your solution, such as: learning, awareness, skill development, higher income level, etc. Outcomes should be measurable and tangible. Then skip over the assumptions and write down the impact that your solution aims at achieving, or rather the medium to long term changes in behaviour, culture and social action. Impact should be as measurable as possible. In order to provide a correct analysis, you have to also test the assumptions that link the outcomes to your desired impact. Assumptions should be tested and verified to guarantee that impact is being made. The last step is to define the value of the impact: social, environmental, economic or cultural and to whom.

References: W.K. Kellogg Foundation Logic Model Development Guide
<table>
<thead>
<tr>
<th>INPUT</th>
<th>OUTPUT</th>
<th>OUTCOMES</th>
<th>ASSUMPTIONS</th>
<th>IMPACT</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>What resources and activities have you used?</td>
<td>What are you delivering?</td>
<td>What has changed as a result?</td>
<td>What assumptions link the outcome(s) to impact?</td>
<td>What is the broader longer term effect of the outcome(s)?</td>
<td>What is the value of the impact and to whom?</td>
</tr>
<tr>
<td>Investments: staff, money, material, information, equipment, technology, partners</td>
<td>Activities: events, products, services, training, partnerships</td>
<td>Short term changes: learning, awareness, knowledge, skills, opinions, aspirations</td>
<td></td>
<td>Medium and long term changes: action, behaviour, practice, decision making, social action</td>
<td>Economic, social, environmental, cultural</td>
</tr>
</tbody>
</table>

- Investments: staff, money, material, information, equipment, technology, partners
- Activities: events, products, services, training, partnerships
- Short term changes: learning, awareness, knowledge, skills, opinions, aspirations
- What evidence is there to support your assumption?
- Medium and long term changes: action, behaviour, practice, decision making, social action
- Economic, social, environmental, cultural
**TOOL 13**

**RESOURCE ASSESSMENT**

**What are the key activities and key resources?**

Complexity: Medium  
Time required: 3 hours  
Material required: pen  
Other: The activity is better done in a group of members coming from all of the areas of activity.

**References:** IDEO.org’s The Field Guide to Human-Centered Design

**What is it for?**

Understanding how you will carry out your solution is pivotal. This entails mapping out the activities necessary to implement the solution and the resources that it will require. The tool helps organize resources by listing what activities will be done, what resources are necessary to perform them and who is responsible for their implementation. The activity is also analytical providing insight on what capabilities are lacking from the internal team and who can provide them.

**How to use it?**

The first step in assessing your resources is to make a list of all of the activities to be performed to make your idea work. Then one by one go through which capabilities are required and who is responsible for them. Are you already capable of performing this task? Do you need assistance? If so, from whom? Keeping your Stakeholders Map readily available would be a good idea!
<table>
<thead>
<tr>
<th>Activities</th>
<th>Capabilities</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>What activities will be required to make your idea work?</td>
<td>What are you already capable of? What resources do you need?</td>
<td>Who is responsible for doing it?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Internal Staff member</th>
<th>Stakeholder A</th>
<th>Stakeholder B</th>
<th>Stakeholder C</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TOOL 14

MOTIVATION MATRIX

Who are my in-kind supporters and key partners?

Complexity: High
Time required: 4-5 hours
Material required: pen, post-its
Other: The activity is better done in a group.

What is it for?

The Motivation Matrix helps teams understand the connections between the various actors that take part in the solution and adds clarity also to their roles by investigating the motivation behind their action. The tool helps to answer questions regarding the interests of each stakeholder and what their expectation is from their involvement. It is a good strategy tool for partnership managers and network development.

How to use it?

The Motivation Matrix can be done individually or in groups (preferable). The first step is to make a list of your stakeholders (See Stakeholders Map tool) and organize them on the matrix accordingly. The next step is to analyze one by one relationships and benefits of each stakeholder.

References: Service Design Tools
<table>
<thead>
<tr>
<th>Brings to...</th>
<th>System Promoter A</th>
<th>Stakeholder B</th>
<th>Stakeholder C</th>
<th>Other Stakeholders</th>
<th>Partnership</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Promoter A</td>
<td>A’s intention (motivation)</td>
<td>Stakeholder’s relationship (what A brings to B)</td>
<td>Stakeholder’s relationship (what A brings to C)</td>
<td>Partnership benefit (what A brings to the partnership)</td>
<td></td>
</tr>
<tr>
<td>Stakeholder B</td>
<td>Stakeholder’s relationship (what B brings to A)</td>
<td>B’s intention (motivation)</td>
<td>Stakeholder’s relationship (what B brings to C)</td>
<td>Partnership benefit (what B brings to the partnership)</td>
<td></td>
</tr>
<tr>
<td>Stakeholder C</td>
<td>Stakeholder’s relationship (what C brings to A)</td>
<td>Stakeholder’s relationship (what C brings to B)</td>
<td>C’s intention (motivation)</td>
<td>Partnership benefit (what C brings to the partnership)</td>
<td></td>
</tr>
<tr>
<td>Other Stakeholders</td>
<td></td>
<td></td>
<td></td>
<td>... enlarge for more stakeholders...</td>
<td></td>
</tr>
<tr>
<td>Partnership</td>
<td></td>
<td></td>
<td></td>
<td>Partnership benefit (what the partnership brings to A)</td>
<td>Partnership benefit (what the partnership brings to B)</td>
</tr>
</tbody>
</table>
TOOL 15

STAKEHOLDERS MAP

Who are my in-kind supporters and key partners?

Complexity: Medium
Time required: 3 hours
Material required: pen, post-its
Other: Try to include people who have a good understanding of the individuals and other organizations who are or might be involved in the solution.

What is it for?

The stakeholders map is a great tool for understanding who your partners are or might be and what role they play or could play in your organization. It also allows you to visualize who you are targeting with your solution, what role they could play in your strategy and how your direct stakeholders work together to reach them and by what means.

How to use it?

Start by jotting down who is involved in co-managing the solution: internal personnel and proactive stakeholders and beneficiaries. Then move outwards and list your strategic stakeholders and technical providers who might co-design and co-produce the solution with you. Conclude by noting down the stakeholders who are impacted by the solution and dividing them into groups: those with whom you may have consulted for advice and insight when designing the solution and those who are merely informed of the solution.
Internal Staff

Stakeholders involved

Strategic Stakeholders

Co-managing

Co-designing

Co-producing

Consulting with

Informing

Level of Engagement

Stakeholders impacted

Providers

Stakeholders involved
What is your cash flow?

Complexity: Medium
Time required: 2 hours
Material required: pen
Other: It should be completed with those managing the accounting.

What is it for?

Having a clear idea of the money coming in and coming out of your organization is important when trying to understand how to manage the sustainability of your solution in any given time frame. This tool will help give you a basic idea of your cash flow and how to manage that in a strategic way. As this can vary in different time frames throughout the year, it’s best to do this activity for each period of the year in order to understand your liquidity in any given time period and how to best prepare.

How to use it?

When determining the costs that will be involved, it is useful to have handy a list of the key activities of the solution. Start by listing the money going out of the organization and then what’s coming in to determine if sustainability is reached and if any surplus is achieved. Lastly, list where the surplus will be reinvested.

<table>
<thead>
<tr>
<th>Money in</th>
<th>Money out</th>
<th>Surplus</th>
</tr>
</thead>
<tbody>
<tr>
<td>What money is flowing into the organization?</td>
<td>What money is flowing out of the organization?</td>
<td>What cash is left over?</td>
</tr>
</tbody>
</table>
| • Sales revenues | • Direct production costs | • Structural investments  
| • Financial investments | • Indirect costs | • Programming  
| [grants, loans, equity investments, loans, etc.] | • Capital investment | |
| • Interest on surplus cash | • Loan repayments and dividends | |
REFERENCES


