

Reflecting on IDEA

Lessons learned from 10 IDEA Journeys in the NetHope Member Community

NetHope's Center for the Digital Nonprofit

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Table of Contents

Introduction	3
Participating Organizations.....	3
Background	3
Research Methodology.....	5
Findings	5
Methodology and Process	5
Step 0 (Pre-Dream)	5
Step 1 and 2 (Imagine and Design)	8
Step 3 and 4 (Execute and Assess).....	10
Impact and Value	13
Design Workshop Impact.....	13
Dreambook Impact	13
Solution Impact.....	14
Conclusion.....	15
Appendix	16

Introduction

The NetHope IDEA Journey™ (Imagine, Design, Execute, Assess) formerly known as D3™ (Dream, Design, Deliver) is the most efficient process for digital innovation across the nonprofit and humanitarian sector. Organizations that engage in this process fundamentally seek to achieve more impact with digital enablement and innovation. This white paper confirms that there is great value derived from participation and engagement in the IDEA Journey process. Moreover, it is validated that community efforts should focus on expanding access and resources to support future NetHope Member IDEA Journeys as well as for local social impact organizations across global south. However, opportunities also exist for process improvements particularly in the lead up to an IDEA Journey - the Pre-Dream phase - as well as in the transition from the Design to Execute phases. If these process improvements are strategically placed in coordinated with facilitators (i.e., NetHope) and external stakeholders (i.e., delivery partners) the participating organization can expect greater value to be derived from engagement in human centered design workshops such as IDEA Journey™.

Participating Organizations

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Background

Participating in an IDEA Journey allows social impact organizations to embark on digital transformation following a four-phase collaborative process supported by major technology and consulting firms. This process begins with problem analysis, transitions to design, and continues through to implementation of innovative solution to one of the sector's biggest challenges. In effect this digital enablement process seeks to explore deeper, achieve greater results, and transform more lives through NetHope Member organizations. The below steps capture the essential elements of each IDEA Journey for each participant:

Step 0 (Pre-Dream)

The organization realizes there is a need to accelerate mission impact on behalf of client communities and that to do so requires digital transformation. The organization gains alignment, buy-in, identifies areas of potential, and receives support from key stakeholders.

Step 1 (Imagine)

The organization completes a series of consultations to determine current state of digital readiness and maturity. NetHope begins coordination of a human-centered design workshop where stakeholders ideate solutions for a challenge the organization believes will catalyze digital transformation.

Step 2 (Design)

After identifying a ‘dream’ (i.e., an area of focus) the organization works with NetHope and delivery partner to scope and plan for a digital solution. This plan includes identifying what will be needed to successfully implement the solution, including people skills, processes, technologies, and funding resources.

Step 3 (Execute)

With support from NetHope and delivery partner, the organization pilots the minimal viable product of the digital solution and evaluates needs to scale. This typically requires several iterative loops between the ideas from *Imagine* step, the plan from *Design* step, and the realities encountered throughout the implementation.

Step 4 (Assess)

The organization begins collecting and managing the data required to assess the solution’s impact, efficiency, and effectiveness in reaching the organization’s goal. Opens opportunities to scale solution and partner with other organizations. This may engage the help of an external party to validate results.

NetHope has conducted 16 IDEA Journeys with individual Member organizations and is in the process of conducting the 17th organizational journey with a nonprofit focused on child development and advocacy. The programmatic focus of the previous 16 Journeys has been predominantly in Advocacy & Justice with three Members, Health & Nutrition with six Members, and Emergency Relief with seven Members (Figure A). Participating organizations were split in terms of the purpose of participating in the IDEA Journey, with eight focused on direct impact services and eight focused on internal business applications. Moreover, eight IDEA Journeys targeted staff for digital enablement while the remaining Journeys had a community focus on IDPs and Refugees for five Members, Children for two Members, and Women for one Member (Figure B).

Of the 16 IDEA Journeys conducted for individual organizations, eight Journeys have solutions designed for digitally enabling client experiences and services through solutions such as care assistants, enhanced case management and feedback mechanisms, as well as client engagement platforms (Figure C). The remaining eight Journeys are more focused on internal aspects of digital enablement and transformation such as innovation labs, information security protocols, as well as monitoring and evaluation frameworks (Figure C). At present none of 16 Journeys have been fully completed, thereby underscoring the difficulty and resources needed for successfully achieving digital transformation in the nonprofit and social impact sector. However, seven of the 16 Journeys have successfully moved forward from the Design to the Execution stage and several of these initiatives are now being scaled.

Research Methodology

Drawing on an inductive methodology NetHope approached each participating organization of the previous 16 IDEA Journeys and recruited 11 representatives for interview and analysis. Interviews took an unstructured approach where participants were encouraged to share challenges, success stories, and personal experiences from the design process as they saw most fit for purpose. The overarching research question was as follows:

- How can we make more digital dreams a reality through the IDEA Journey process?

Discussions followed an interview protocol focusing on the primary categories in the delivery process (i.e., methodology of the IDEA Journey) and the reported impact of participation (i.e., ROI of IDEA Journey to nonprofits). Every conversation was recorded and transcribed both through manual and AI assisted technologies, after which major themes and findings were coded based on sentiment (i.e., enablers and barriers) as well as the stage at which the sentiment arose (i.e., Imagine, Design, Execute, Assess). If a theme arose more than three times amongst participants, it was noted within the findings section of this document. The entirety of this process allowed NetHope to reveal the strengths and weaknesses of the current design process, develop process improvements, and engage with corporate partners to make IDEA Journeys more sustainable and more impactful for the NetHope Members in the future.

Findings

Lessons learned have been grouped into two major categories: process improvements based on the key phases of an IDEA Journey as well as the impact from participation in an IDEA Journey.

Methodology and Process

Step 0 (Pre-Dream)

Before engaging in an IDEA Journey there were enabling factors and barrier conditions which previous IDEA participants noted as critical to the early development and implementation of solutions from the Dreambooks.

Affordability of Services

Participants noted that while participation in the IDEA Journey process came from recognized business priorities, actual engagement came from zero-cost or pro-bono consulting offerings made visible through NetHope. Collaborations on IDEA Journeys were catalyzed by notions of “we had restricted budget and lack of specialty skilled people” (P10), that IDEA “is a service free from a consortium that we benchmark against, where we're going to get high powered consulting help to dream this out” (P6), as well as “[insert delivery partner] came to us with a free workshop and was keen to work with us” (P5). Looking back, project sponsors noted that their organizations would not have engaged in human-centered design workshop – like the IDEA Journey – without “NetHope and [insert delivery partner]” coming to the table first (P7) and “a significant amount of investment on the part of different donors”(P11). Pay-walled expertise and consulting services is a detriment to collaboration on social impact. Future Journeys should capitalize on nonprofit interest and seek to make future workshops more accessible for Members and partners from the global south.

Benchmarking Digital Capabilities

Participants noted that organizations “move at their own pace when it comes to digital” (P10) and that as a result the digital capabilities of nonprofits should be benchmarked before participation in an IDEA Journey. Regarding the delivery partners, participants noted that it would similarly be beneficial for a neutral third party – such as NetHope – to be a more effective “match-maker” (P1) between nonprofit capabilities and the unique value added from specific delivery partners. Several participants partnered with one consulting firm just to conclude “Yeah, we can deliver on this, but we're not going to deliver it with you” and as a result needed to find a different partner for vendor selection and solution execution (P6). Likewise, participants noted the usefulness of benchmarking nonprofit capabilities with perspectives like “do you have in-house design and development capabilities? What skills do we have? How can we best work together on an amazing solution?” (P5). Such efforts would dispel any “misunderstanding about how high [insert nonprofit] capability was” (P9) and prevent design breakdowns related to “afterthought” (P8) approaches on data or digital enablement. By benchmarking the digital capabilities of nonprofits and delivery partners alike social impact investors can act as more effective stewards to the innovation process.

Commitment to Digital Transformation

Engagement with IDEA needs to be approached with the understanding that the process leads to business transformation and not just implementations of digital solutions. Participation in IDEA Journeys should come from an internally recognized sentiment that “[insert organization here] needed to do better” (P1) or that “this business model would not scale to reach millions more clients” (P8). The innovation process may face significant barriers – such as an international pandemic like Covid-19 – which challenge the organization’s digital dreams and lead to stalled initiatives (P4). Failure to recognize the potential disruption of such a transformation will generate unsatisfactory impact or value from participation in human-centered design workshops such as IDEA Journey. Moreover, it may be discovered after beginning the Journey that the organization “was ready to dream... but not to do anything with it” (P1). Participants noted that agility and adaptability is needed throughout the innovation process and such mindsets should be established early on. Overall, Journey participants need to be committed to “a multiyear journey of a mindset shift” (P8) which may be dynamic in nature.

Executive Support for Participation

Commonly mentioned in successful IDEA Journeys is the notion of senior executive support. For Journeys that were coordinated through NetHope, executives were often included and thus already bought into the process at the outset as they control organizational levers on budget, resourcing, and functional assignments. In several cases participants had worked with teams to present senior executives with “a wish list” (P1) or a “transformation roadmap” (P5) that IDEA Journeys could engage on. However even in these cases, participants noted that “it would have been better to get more executive input in the overall mix... Such that we have greater sponsorship at the next level” (P4). Without support from senior executives the impact of an IDEA Journey would be limited to “pilot initiatives which may not see wider uptake from the organization” (P7). Regardless, support from decision-makers is an integral characteristic of IDEA Journeys serving to “translate ideas into action” (P8) allowing organization to more easily transition to the Execute and Assess phases of the innovation process.

Expectation Setting for Partnerships

Challenges were noted with delivery partners which were observable at the beginning phases of participation in IDEA Journeys. There is a noted sentiment amongst participants that clarity is needed on the motivations behind corporate support such that “nonprofits know why specific partners want to get engaged” (P3). For several participants, delivery partners were not fully engaged at the outset, “I knew through talking to people at NetHope that our delivery partner and facilitator had already booked other clients” (P1) hinting that client acquisition was more important than sustainable impact through IDEA. Other participants noted that it was unclear how far the delivery partner could take the nonprofit “[insert delivery partner] couldn’t build an app even if it was the right answer” (P5) and that “[insert delivery partner] was just an implementation shop for [insert delivery partner]” (P1). While others noted that “[insert delivery partner] came in with a financial incentive... and they would make up money in the [design] and [execute] phase” (P6). These sentiments indicate misalignment in corporate support and partnerships with nonprofit organizations. Partners need to reevaluate, as noted by one participant, whether they are just engaging for “another social impact story” (P5).

Institutional Seed Funding

Before entering IDEA, nonprofits need to acquire internal resources necessary to host the design workshop or to later execute on the ideas. While many services and offerings are pro-bono or discounted there remain observed overhead and business costs such as, “relatively low for the workshop... but costs for us were mainly the travel costs from the participants” (P7). With hindsight, participants reflected, “all the ideas that we’re trying to tackle are pretty big, and by big, probably expensive. And so, if there had been, you know, maybe some funding procured ahead of time that, like we knew would be coming, that might have helped push things along” (P3). Future IDEA Journeys should focus efforts on the early stages of the process to ensure that the organization has “people actually from fundraising functions of the organization” (P8) and that “future cost implications” (P1) are made clear. This is especially important regarding internal funding sources which will kick-start the design workshop and eventual support the development of the digital solutions identified in the Dreambook.

Scope of the Problem Statement

Organizations exploring an IDEA Journey should seek to establish a strong and contextualized problem statement that clearly lays out the selected issue and what impact looks like. A broad statement like “what should the [insert organization] strategy be” is ineffective and non-conducive to human-centered design methodologies such as IDEA Journey. Instead, a specific component of that digital enablement strategy could have become the focus (P3). Likewise, overly bold problem statements such as “serving the future refugees” by building client services through “an app for refugees” or other affected communities fails to capture the complexity or needed maturity for digital services and equally needs to be evaluated for feasibility and impact (P5). It is recommended that participants “manage expectations... This initiative is not to boil the ocean. Even if that is our vision to boil the ocean” (P6). The goal of all participating stakeholders is to refrain from falling into the trap of “applying a good process to a bad problem” (P5) and proper scoping at the outset will help ensure that is the case. Participants noted that “there may be a piece for NetHope or the partner that’s selected that might be able to support some of that research” (P4) highlighting an opportunity for partner improvement.

Workshop Location and Format

Regarding the format (i.e., timing, logistics, and location) of the design workshop, participants were split on the effectiveness of in-person vs. remote participation models. Participants noted that in-person workshops were most ideal in that “they were only a couple of days... and we were able to actually get all the right people in the room... which is pretty rare.” (P1) and that “two days was good... that is the maximum time you can pull people out of the business” (P2). However, participants emphasized that when “faced with constraints” remote design workshops were just as effective as a facilitation space for the innovation process (P8). Participants highlighted that a remote workshop “allowed for even more individuals to be part of the process” (P7) and that “remote participation also sort of helped with just people being able to fit this into their already busy schedules” (P4). Organizations should consider the format which is most conducive to getting vested stakeholders in the room for the Design workshop.

Step 1 and 2 (Imagine and Design)

While engaging in an IDEA Journey there were enabling factors or barrier conditions which participants noted as critical to a successful ideation and design workshop.

Best Practice Aggregation

Highlighted as an important gap in the Imagine and Design phase is increased support on aggregating and presenting existing best nonprofit practices for digital enablement. Participants noted that NetHope especially could be “a stronger partner and saying... you guys are not special snowflakes, this is how every other nonprofit like you does this particular thing” (P1). In this way the design workshops could capture the self-referential nature of the sector by “sharing best practices around who's further along, who can learn from it and, you know, encourage that members staff bring their learnings from one place to another” (P8). Through this effort resources can be saved, key knowledge gaps can be filled, and sectoral duplication can be avoided with collective actions and collaboration.

Cost and Resource Disclosures

A barrier in the Imagine and Design phase is lack of disclosure on the resources and financial expenditures needed to move forward. Participants emphasized that there “wasn't any funding for actual implementation” (P11). Thus, for nonprofits in this process, “It's about money... convincing decision-makers to provide budget for doing the next step of the work” (P2). Other noted that “leadership is really happy to write a check for money to make a problem go away, but they're not willing to free up people to spend time on it to really get it to be something that people buy into.” (P1). In either case participants noted that “full disclosure of costs is important, you know, we were going along swimmingly, until we got a price tag that we're like, whoa... we can't afford this price tag” (P6). This is important, as one participant highlighted, “we needed to make major investments... hiring 20 PhD data scientists” to get the project off the ground (P9). By including required costs and resources into future IDEA Journeys the end deliverables – i.e., the Dreambook – will serve as a more effective pitch deck for the Execute and Assess phases. As one participant noted “for me, it always gets down to what's it going to cost... So just give it a spot of saying, here's the overall feasibility... the overall sort of viability... and market demand for these aspects of it” (P4). Future IDEA Journeys would benefit from early and honest conversations about “if we had real commitments around funding” (P11).

Design for a Strategic Bridge

Advantageous to successful IDEA Journeys is project sponsors aligning participation in the IDEA Journey with strategic priorities of the enterprise. In several examples, participants noted that “[insert nonprofit] were living the strategy”, that IDEA fit into “execution of the new technology strategy... and that it could help us in one of our most painful challenges” (P10), and that the IDEA Journey was connected to “our anchor project with [insert high value donor]” (P4). Strategically aligning outcomes of the IDEA Journey with wider organization priorities brings with it institutional support. In this way the Dreambook becomes a pitch deck for critical business operations that serve the entire enterprise and not a siloed programmatic effort. Participant sentiments identified the IDEA Journey as an opportunity to “reimagine the [insert nonprofit] of tomorrow” (P8). Accordingly, moments of strategic development represent constructive moments of engagement with IDEA. As one participant noted, “it was the right time... because we were just at the end of our strategic development, and we were looking for improving learning with digital tools.” (P7). The identified digital dreams within the books then become pieces of the strategic implementation for the wider organization.

Inclusivity of Workshops

Before the Imagine and Design phases it is important to ensure organizations have the right stakeholders included into the design workshop. This may include the extended invitations to other business units such as in-house design teams or program leads that have stake in seeing the IDEA Journey completed. One participant noted “at the time, it was like, let's get loads of frontline people in the room,” but in hindsight the participant noted that it would have been better to balance participation across the organization to ensure “a couple of more of the right kind of technologists were in the room” (P5). Moreover, while senior executive buy-in and alignment was considered critical the participation of such stakeholders in the Design and Execute phases may not be necessary. As one participant noted “Our CEO... he can be very old-fashioned in his style, So, I had conversations with the leadership team... we ended up not inviting [the CEO] to the session because we all agreed that he would lose his patience.” (P2). In this way careful consideration should be given to the balance of stakeholders participating in the design workshop. Participation from those who would be involved in the Execute and Assess phases, such as field or program functions, should be prioritized over representation from the headquarters or global north.

Partner Selection and Support

Evident in the relationships stewarded between delivery partners and nonprofits are elements of misalignment on the capabilities each partner can provide, as well as expectations on how far the delivery partner can take them through the innovation process. Participants noted frustration with the consultants that were unfamiliar with nonprofit operations or their specific business models, “a lot of problems had to do with [insert delivery partner] people, they basically had one person who, who could do what we needed them to do” (P1) and that it “very clear that [insert delivery partner] wouldn't be the right organization... because they didn't have that kind of expertise, which they said themselves (P2). Others had issues with personnel from delivery partners that were “junior or new to their functions” (P5) or who were coming to the table with “tools and methodologies... that were very often northern, white, and commercial. So, we constantly had to say southern, multiracial, multicultural, NGO speak” (P8).

Partners need to better align design approaches with the nonprofits they are consulting. In this space, NetHope and other third parties should also leverage nonprofit expertise in a way that serves as a “real time interpreter” (P8) to the innovation process. Addressing these concerns, participating organizations in IDEA selected delivery partners that had insight into their organization, as one participant noted, “we had a lot of contacts at this time at Avanade already, because they are implementing for us on D365... and that they have also a kind of framework to implement this kind of [digital solution] easier” (P7). Moreover, nonprofits should recognize that there may be a moment where the organization realizes “Yeah, we can deliver... but we’re not going to deliver it with you” (P6) and that selecting a different vendor or partner for Execute and Assess phases may be necessary as the organization proceeds to implement identified digital dreams.

Step 3 and 4 (Execute and Assess)

While engaging in an IDEA Journey there were enabling factors or barrier conditions which participants noted as critical to execution of solutions from the IDEA Journey.

Change Management for Transformation

Critical to the successful execution of digital dreams identified in IDEA Journey and Dreambooks is effective change management practices. As one participant noted “the hardest part of IDEA is change-management” and that “there’s an awful lot that happens after that design session. And it’s rocky” (P1). One participant noted that there was “some uncomfortable truths... which required pitching a reimagined of our entire programs” (P9). Identifying needs and possible solutions therefore is the first component to a wider process of organizational transformation that is also influenced by capacity building, funding and grant acquisitions, organization culture and staffing, procurement processes and vendor selection, as well as other variables.

Participants from previous IDEA Journeys noted that transformation from IDEA Journeys requires alignment and buy-in, “this is not an IT thing. This is an organizational change; it is digital transformation” (P6) and participants accordingly need to prepare to equip the enterprise – or specific job functions – with needed resources to successfully adopt solutions or outcomes related to the IDEA Journey. Within this context of change-management one participant level set expectations on impact from IDEA Journeys, “So if 80% of dx projects have failed to deliver, either on time or outright failed, or too costly, in the for-profit world, why do we think they’re going to be any better in the nonprofit world” (P8). There is an opportunity for NetHope and delivery partners to get more involved at this stage, connect organizations with change management expertise, and ensure delivery of the identified digital dream.

Course Correction Mechanisms

Noteworthy to the Imagine and Design phase as well as the next steps of Execute and Assess are intentionally designed “mechanisms to course correct” (P5) and assist IDEA Journeys that are “not linear” (P10). For the IDEA Journeys that took place near or after March of 2021 this may have meant adjusting to external events, such as international pandemics. As one participant noted, “Covid-19 happened right as [insert organization] was getting through the planning process” (P4). Several participants noted that they could have used a moment of course-correction to reestablish buy-in from stakeholders as they “definitely had some people

at [insert organization], who really didn't want to see this project go forward" (P1). Other participants noted with advantages of hindsight that they wish their organizations would have capitalized on moments of uncertainty to revisit the problem statement during the Design stage, "afterwards, I realize if it had been something more specific... it may have been easier" (P2). Having a moment to reprioritize and focus on a specific component of the wider vision is important as participants "lose track of the vision" (P3). In response to these concerns participants emphasized the importance of "digital agility" and strong "project management... and regular product sprints" (P7) which offer continuous improvement opportunities to the innovation process and the stakeholders involved. Overall, participants noted that IDEA Journeys need to "better follow ideas through time" (P10) and make digital dreams reality.

External Funding to Build and Scale Solutions

Commonly described as a barrier to the transition of IDEA Journeys from the Design to the Execute phase was the availability of funding to build, develop, and scale the digital solutions from IDEA Journey Dreambooks. As participants noted, "without knowing for sure, how the funding would come about, that was a major problem to progress" (P3). Even in cases where money was available for execution of Journeys, participants noted it was usually only enough "to get through the some of the costs associated with the different aspects of the [Dreambook]" (P4). Several participants noted difficulties in acquiring sustainable funding wherein executives start to ask, "why are we still spending money on this?" which was tough to answer because the vision was a "marathon... we're not going to run for two years and get there" (P6). There was a shared sentiment amongst participants that it would be extremely beneficial to establish a "fund which would give out grants to help some of the scaling projects" which would "guarantee funding or at least guarantee the push to get the funding" (P8). By making funding available to translate ideas into action, nonprofits seeking to participate in the innovation process laid out through IDEA Journey would be more productive.

Field Inclusion and Testing Solutions

Critical to the successful execution of digital solutions from IDEA Journeys is input from the field and the global south where nonprofit programs seek to make an impact. Participating organizations were not always able to include field staff in the design workshops, "it's hard to get the balance of usefulness for global and for all the frontline staff, I'm not gonna take off the frontline and put them in a workshop" (P5). In these cases, it is even more important to ensure that field staff are included in the building of solutions for the Execute phase, "when we develop something strategically on global level, the implementation comes on regional and on the field level" (P7) -- meaning that to have impact through an IDEA Journey these stakeholders must be included. As another participant noted, "Things run differently in the field, things, things have to be different in the field" (P6) and to account for these nuances nonprofits need to "make sure that the technology will work on site... on the ground, it's an AI solution, or biolabs, rural areas, Africa, and connectivity, power, all these kinds of question marks, which can be there" (P7). In this way IDEA Journeys and the executed digital solutions represent a "fundamental relationship shift between [insert nonprofit], the [clients] and their [local] partners around data, digital, and impact" (P8). If these stakeholders are not included at the outset they must be included at the Execute phase to ensure that the identified solution is fit for purpose and feasible for social impact at the local level.

NetHope Engagement for Execution

While participants noted NetHope support as critical to the outset of IDEA Journeys, participants also illustrated a “gray area where we didn't really know what was going to be available [from NetHope]” (P11). Several participants noted they were “unsure how to engage with NetHope on the design and deployment” and that “NetHope didn’t have a relationship with the vendor we selected” (P1). Others noted that NetHope needed to provide clarity after the Design phase by establishing, “here's what you're getting for free. Here's some advice on how to get through that process. When you get to the second stage... Here's the expectation” (P6). The standard for IDEA Journey participants was that “once we had the results, the dream book... we developed the project itself ourselves” (P7) without NetHope support. There is an opportunity within this innovation process for NetHope to become a more effective third party to IDEA Journeys by increasing staffing, resources, and collective action toward the end-phases of the Journey. Partnerships with change-management, donors, and additional delivery partners should be considered for development in this space.

Ownership for Execution of Solutions

Conducive to the advancement of an IDEA Journey to the Execute phase is a business lead who has ownership and responsibility for moving the organization forward on the various stages of the innovation process. This is especially relevant in the transition to the Execute and Assess phases. Participants noted that in IDEA Journeys where the initiative stalled that there “wasn't a good owner for [the IDEA Journey] at the time.” (P3) and that “the business user, who was kind of the business sponsor left the [organization]... So, you know, everything basically ground to a halt.” (P1). Whereas in Journeys where continuous progress was made “there was already a business sponsor... that was strongly supportive in bringing in other executives and getting them onboard” (P4). Assigning ownership to functional leads or business units creates an important source of continuity and sustainability to the innovation process. In cases where the “sponsor leaves and takes the dream with it” (P8), previous efforts to democratize the innovation process should allow for another sponsor to step in.

Follow-Up Design Workshops

Noted as relevant to the continuous improvement of solutions identified in the Dreambooks of IDEA Journeys are second or third design workshop which realign the organization on the purpose of the digital dream and how to best proceed. Participants highlighted that often “we've been marching towards a deadline... and suddenly we're realizing that they aren't participating in they're not buying in” (P1). In pursuit of most effectively bringing people back into the fold a similar ‘Execute workshop’ could be held to synchronize staff from across the organization on the problem statement and feasibility of the identified digital solution. This methodology proved successful for two organizations, one who “made the strategic decision to have two workshops” (P1) and another which struggled to achieve organization alignment and buy-in the first time but “were massively successful and cross functional at the second” (P9). Replicating this template for future may be effective for reviving stalled IDEA Journeys as the sector emerges from the COVID-19 pandemic with increased funding and digital capabilities.

Impact and Value

Design Workshop Impact

Participants emphasized great satisfaction with the value of participating in human-centered design workshops such as the one afforded to nonprofits by the NetHope IDEA Journey. As previously noted, the workshops offered a “rare opportunity” to get all the relevant stakeholders together with low-cost implications (P1). What’s more, the workshop created a “safe space for innovation” (P6) that allowed everyone to get outside of their “comfort zones yet in the same room” (P2).

Participants noted, despite slight issues with global north approaches, that “people showed their personalities in surprising but innovative ways” (P2), that “moderators saw disparities and intervened to encourage participation” (P3), which allowed for those participating in the workshop to “suspend judgement of the possible” (P4). Overall, design workshops were extremely effective in providing value for nonprofits going through the IDEA Journey process. Nearly unanimously, participants highlighted the design workshops as opportunities to “gain clarity on the issues” (P6) and to move forward on those issues with agile human-centered design processes which get “[insert nonprofit] closer to alignment than traditional program meetings would have” (P3). It is clear that without “NetHope and [insert delivery partner] coming to the table” that nonprofits would not have the same access to such a valuable design experience.

Dreambook Impact

According to participant sentiment, the impact of the Dreambooks as a final deliverable is limited. Composition and format of the Dreambook is variable based upon nonprofit preferences and outcomes from the Design phase. Some had “captured four possible ideas” (P7) while others had a “single but very broad vision” (P6). Formatting and composition are also impacted by the specific approach of the delivery partner. Participating organizations found the Dreambooks and accompanying resource material most useful as a “pitch deck” (P4) which could be adapted for presenting the innovation process to different audiences. The effectiveness of the Dreambook as a pitch deck was variable amongst participants where one participant noted that it “served as a playbook for the next steps” (P4) while others mentioned that “the Dreambook provided essential elements for our concept proposal” or in more extreme cases “nobody refers to the Dreambook but the idea is captured in other programs” (P3).

The most common sentiment was that “the idea has evolved a little bit, but we refer back to the Dreambook so that people understand what we're aiming for” (P11). In this way, tracking the exact impact of a digital dream from IDEA workshops or the Dreambook is difficult to substantiate but known to have continuing impact as a “north star” (P11) for participating nonprofits and their digital dreams. In this context, there are opportunities for NetHope and delivery partners to ensure that the Dreambook is composed in a manner that is not just a retrospective of previous work but also a living document which acts as a proactive force for digital enablement by establishing the next steps to move forward on this set of digital solutions.

Solution Impact

Client and Local Impact

Of the Journeys that sought to focus the innovation process on “digital transformation for program participants” (P7) there has been limited evidence of impact at the local level. At the global level, IDEA Journey participation led to “single sources of truth from data collected at the field level” (P6) as well as “really uncomfortable truths... about impact... about what was working” (P9) which allowed for changes to be made at the leadership and management levels that addressed impact inequities or poor return on investments. It also allowed for participating organizations a moment to “think outside the box” and realize that existing business models or program approaches could not exist in a digitally enabled space (P8).

Only one participating organization in the NetHope IDEA Journey had a client-facing tool or digital device that has made it to deployment or Assess phase. In this case, the organization has affirmed that “the tool simulates human trainers... to bring the wealth of knowledge that we have as organization” directly to the client (P7). Although this is a notable example of a successful of IDEA Journeys making a direct impact for clients, much of the impact has been indirectly related to data capture and harmonization across the organization. Future Journeys should continue to focus on the client or affected communities of participating nonprofits such that more local impact is made through IDEA.

Enterprise and Staff Impact

Evidence of impact from participating organizations in IDEA Journeys is very substantiated at the enterprise level. Fundamentally, the design workshop work along with identified digital solutions from Dreambooks to align participating the organizations on a “common view on where we were... and where we actually wanted to be” which can be difficult to achieve in globally dispersed and culturally diverse organizations (P2). Participants in IDEA noted that IDEA Journeys “definitely felt a community building type effort... where we are all trying to ride this boat... navigate the agency” (P3). This community bonding effort in turn led to everyone “focusing on the same problems at the same time on the same solution... kind of reinforcing, we really need to make this a priority” (P9). The purpose of the design workshop, Dreambook, and digital solutions therefore is to leverage this alignment into action and impact for clients and staff alike.

For the IDEA Journeys which have moved to the Execute and Assess phases, participants noted early success stories from the innovation process wherein their organizations were able to “take friction out of [internal business functions]” (P1), create the foundations for a “single platform for data management” (P3), coordinate “headquarter visibility on data collected at the field level” (P6) as well as extend “digital transformation for program participants” (P7). Participants noted that the initial business investments in IDEA were thus productive and continue to contribute positive operational growth toward digital enablement and maturity for organizations which participated. As impact continues to be gained from IDEA collaborations, there begin to emerge example of solutions being implemented and “scaled to partners in the field” (P7), however, these solutions are part of “wider visions” where nonprofits “want more progress” (P6) from solutions identified in IDEA Journeys, meaning more progress can be expected in years to come.

Further evidence of impact can be derived from the way in which IDEA Journeys have affected staffing and training in support of the Execute phase within the innovation process. One organization saw budgetary support “increase in the millions” (P8) while others saw staffing behind major support function increase “by 60 staff positions” (P9). Another organization noted that they realized “they lacked the talent and needed to hire for it” leading to a “3x increase in staffing around the project” (P4). Generally, organizations that have worked with NetHope on the IDEA Journeys the sentiment is that “[insert nonprofit] are well on our way... and will have large scale success” (P6) but that this success requires continued effort and funding. Furthermore, the design and implementation of solutions in Dreambooks showed “that certain things are feasible, when you have enough endurance, and when you have a good concept” and as a result such efforts continue to pay off by digitally influenced other program approaches for the better (P7). Overall, IDEA Journeys have been utilized as important catalyzing events for digital transformation across participating nonprofit organizations.

Conclusion

While the IDEA Journey has brought tremendous benefits to those that have committed themselves to digital transformation there are numerous opportunities for process improvement and in effect greater impact for participating organizations and client communities that they serve. Through interviews with 11 participants of the 16 NetHope IDEA Journeys, there are opportunities within the Pre-Dream phase by creating a viable and feasible problem statement; in the Design phase by expectation-setting support from delivery partners as well as designing for strategic bridges in solutions; and finally, in the Execute phase, by ensuring organizations are prepared for the change-management process and that they receive more effective support from NetHope and other third parties to the IDEA Journey. With these process improvements, as well as ongoing hard work from participating nonprofits, global and local impact will continue to emerge from collaborations coordinated by NetHope and with support from partners across the social impact ecosystem.

Appendix

Figure A



Figure B

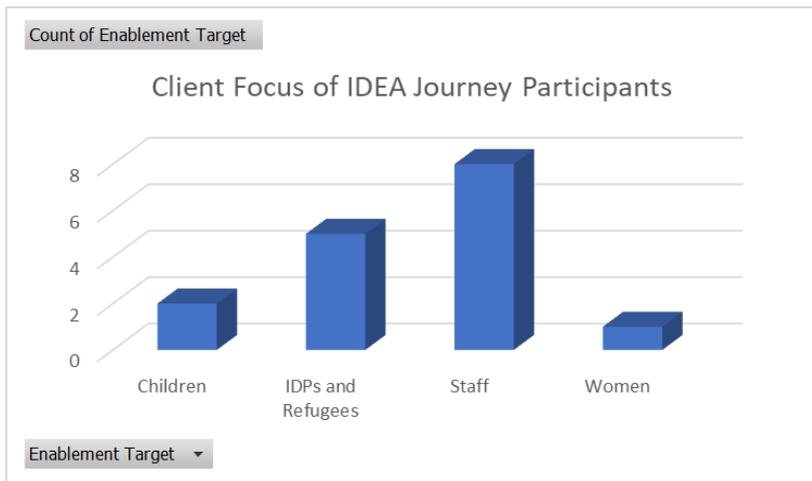


Figure C

