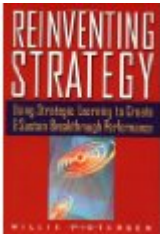


# Change

Association of Small Foundations  
San Francisco  
October 6, 2012

John Bare  
The Arthur M. Blank Family Foundation  
[jbare@ambfo.com](mailto:jbare@ambfo.com)  
404.367.2062



*Reinventing Strategy: Using Strategic Learning to Create and Sustain Breakthrough Performance*  
Willie Peterson, Columbia Graduate School of Business

**Change = D \* V \* P**

Where,

D = Dissatisfaction with the status quo

V = Vision for a new and different future

P = Process for implementation

Together, these variables must outweigh the costs associated with the change.

If any element is missing from the model, no change will occur.

- “When D (dissatisfaction with one’s current state) is missing, there is no felt need for change. People refuse to support any change effort because the overwhelming mood is one of complacency and smugness. The prevailing sentiment is: ‘Why should we give up what we know?’”
- When V (a clear vision for change) is missing, people recognize the need for change but can’t envision an end state. The result is a mood of anxiety and confusion as people struggle to understand where the organization ought to be heading. The prevailing sentiment is: ‘We’re being asked to give this up, but for what?’”
- When P (a process for getting it done) is missing, people accept the need for change and know where the company wants to go, but they don’t understand how they will get there. The mood is one of frustration and ultimately of rejection of the change effort due to lack of confidence in the organizational leadership. The prevailing sentiment is: ‘We don’t know how to get there.’”

# Tools

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## Risk Analysis

Questions for risk assessment

1. What can go wrong?
2. What is the likelihood that it would go wrong?
3. What are the consequences?

Questions for risk management

1. What can be done and what options are available?
2. What are the associated tradeoffs in terms of costs, benefits and risks?
3. What are the impacts of current management decisions on future options?

["Risk,"](#) *The Evaluation Exchange* (Fall 2002)

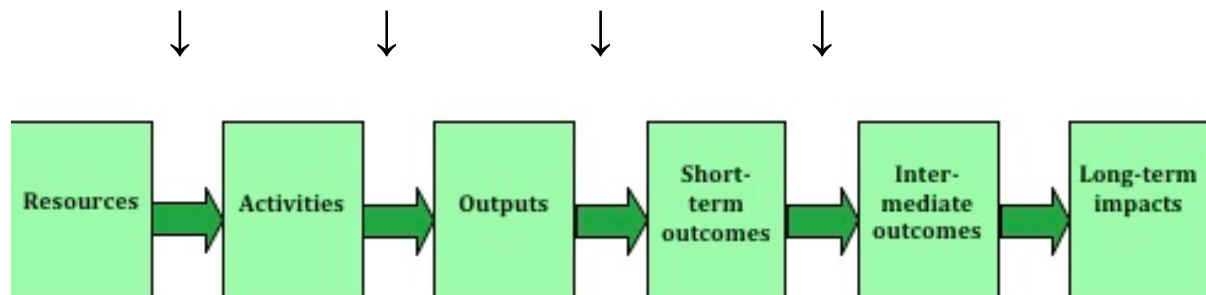
## Testing Assumptions

With our grants, we believe: If we do x, then y will occur.

What are the underlying assumptions? (The secret: with logic models, it's the arrows, not the boxes, that matter.)

What process is in place to test these assumptions as the work unfolds?

Once we identify the variables we need to track to test the assumptions, we have the core of our evaluation plan



## Scenario Planning - [Global Business Network](#)

“Scenarios are stories about how the future might unfold for our organizations, our communities and our world. Scenarios are not predictions. Rather, they are provocative and plausible accounts of how relevant external forces — such as the future political environment, scientific and technological developments, social dynamics, and economic conditions — might interact and evolve, providing our organizations with different challenges and opportunities.”

Example: “Royal Dutch/Shell had long relied on forecasting to guide strategic decisions. But by the early 1970s, Shell had come to realize that traditional forecasting created a narrow, blinkered view of the future and invested in scenario planning. As a result, Shell did not make a prediction about the future price of oil; instead it systematically developed a set of plausible scenarios about what could happen to oil prices in different contexts. When Shell saw the indicators for one of its scenarios — one that featured a rapid rise in prices — were coming to pass, it changed its strategy accordingly. Other oil companies thought Shell was crazy, and that a rise in prices was impossible. But it wasn't. Shell was the first oil company to profit from the 1973 oil shock because it was the first to see it coming.”

### **Fundamental Principles**

**“Take the Long-View.** The day-to-day work of most organizations is driven by near-term concerns, from quarterly profits to 1-3 year planning horizons. However, in reality, most strategic choices — from new product concepts to shifts in policy to new leadership — are choices that will play out a long way into the future. Taking the long view offers a more proactive and anticipatory approach to address deep-seated problems; see both challenges and opportunities more clearly; and consider the long-term effects and potential unintended consequences of actions that you might take.”

**“Think from the "Outside-in".** Most organizations are surprised by discontinuous events because they spend their time thinking about what they are most familiar with: their own organization. They think from the inside — the things they can control — out to the world in which they operate. Conversely, thinking from the outside-in begins with pondering external social, technological, environmental, economic and political shifts changes that might, over time, profoundly affect your community and organization, creating profound new risks and opportunities in the process.”

**Embrace Multiple Perspectives.** The introduction of multiple perspectives — different voices that will shed new light on your strategic challenge — helps you better understand and challenge your own assumptions while painting a bigger picture of an issue or idea. This is achieved in two ways: by engaging a diverse internal team — demographics, functions, seniority, experience — in the process as well as incorporating provocative external perspectives. The result is an expansion of an organization's peripheral vision — you see new threats and opportunities that you otherwise may have missed.”

## **Mini-Case Study #1**

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### **The Weekend Getaway**

From Atlanta, I am leaving on a Friday to meet my wife in NC, outside of Charlotte. I'm taking her and one of her friends to the opera on Saturday night in Charlotte. We also have plans to visit with family, consider a new laptop computer purchase and for her to try a new yoga class.

**How will I evaluate the weekend?**

## Mini-Case Study #2

Association of Small Foundations  
San Francisco  
October 6, 2012

John Bare  
The Arthur M. Blank Family Foundation  
[jbare@ambfo.com](mailto:jbare@ambfo.com)  
404.367.2062

### GoGirlGo! / Zamzee

**Grant:** \$75,000 to the Atlanta GoGirlGo! program

**Purpose:** To increase the time spent in moderate-to-vigorous physical activity for 1,500 Atlanta girls, ages 11-14, who are “missing out on” or “opting out of” regular exercise and at risk for sedentary lifestyles, through the integrated use of the Zamzee activity meter/online rewards platform and the GoGirlGo! curriculum.

**Note:** The Zamzee device provides an incentive for users to increase time spent in moderate-to-vigorous physical activity. The Zamzee activity meter is worn on the shoe or belt. It can then be plugged into a computer, like a thumb drive. Connected to the Zamzee web portal, Zamzee software converts the activity to points. At the site, kids see how active they have been and participate in social media activities. Zamzee provides more points when users spend more time in physical activity. The points can then be exchanged for rewards in an on-line social media setting. In the randomized controlled trials of Zamzee (looking at more than 350 participants and more than 10,000 days of activity), the treatment group spent about 30% more time in moderate-to-vigorous physical activity, with effects persisting through observations at 12 weeks. Zamzee finds that its target population of pre-teen and young teen girls are motivated to move more when rewarded with extra points for improvement and connected to peers in the social media setting. Paired with the GoGirlGo curriculum, Zamzee will be an incentive to get this particularly hard-to-reach population to become more active.

The Atlanta project will be part of HopeLab’s national launch of Zamzee, which will begin in late 2011 and run through the first half of 2012. The Zamzee launch also is timed to the rollout of the revised GoGirlGo! curriculum focused on this 11-4 age group, developed in partnership with HopeLab. Girls will keep their Zamzee devices as their own.

**How will I evaluate the grant?**

## Mini-Case Study #3

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San Francisco  
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The Arthur M. Blank Family Foundation  
[jbare@ambfo.com](mailto:jbare@ambfo.com)  
404.367.2062

### Arts Engagement Initiative

**Foundation Initiative Goal:** To promote engagement in the arts for all residents statewide. The Foundation is interested in arts engagement that embraces and advances the diverse ways that we experience the arts and that strengthens our ability to thrive together in a dynamic and complex social environment.

**Strategy:** The Foundation seeks to help nonprofit arts organizations experiment with new ways of engaging audiences and participants. Grant awards are intended as risk capital for nonprofit arts organizations to:

- Engage low-income and/or ethnically diverse populations that have been traditionally underserved by arts nonprofits
- Utilize active participation in the arts (including participation afforded by new technology)
- Experiment with the use of non-traditional venues for arts experiences in their proposal design

Our strategy focuses on support for arts nonprofits who seek to adapt to the changing environment via three distinct engagement pathways:

- **Who** is engaging in the arts: We aim to increase engagement by low-income and/or ethnically diverse populations that have been traditionally underserved by arts nonprofits.
- **How** people engage in the arts: We aim to expand the ways people engage in the arts as active participants – by making or practicing art. This could include the use of digital technology to produce or curate art.
- **Where** people engage in the arts: We aim to advance the use of diverse, non-traditional spaces for arts engagement, especially in regions with few arts-specific venues.

**How could we use evaluation tools to re-imagine the strategy?**

