

The Improve Group



PUBLIC BENEFIT CORPORATION

2018 ANNUAL REPORT

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INTRODUCTION

The Improve Group helps mission-driven organizations make the most of information, navigate complexity, and ensure their investments of time and money lead to meaningful, sustained impact. We fulfill this mission by helping organizations engage communities, develop strategies, and assess their progress towards the impact they desire. In 2016, The Improve Group became a Public Benefit Corporation to better reflect our organizational commitment to supporting partners in creating and sustaining meaningful change.

In January 2016, we further clarified our benefit through three strategic goals, which were reaffirmed in January 2019. These goals are:

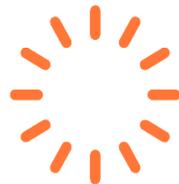
- **Our practice supports positive social change.**
- **Our services are expanded and revenue diversified to include marketable products and tools.**
- **Our work is led by a joyful, engaged, powerful team.**

As we continue to make progress toward these goals, our public benefit is realized by the benefits we offer to staff, clients, project stakeholders, and the broader community at large.

CORE ORGANIZATIONAL VALUES:



THOUGHTFULNESS



EXCELLENCE



**COLLABORATION AND
INCLUSIVENESS**



**INNOVATION AND
CREATIVITY**



JOY



**BUILDING A BETTER
WORLD**

OUR IMPACT

In 2018, The Improve Group invested time, money, and other resources into producing positive impacts as an organization and related to our three strategic goals. We focused on specific actions and changes that could make the greatest difference and restructured the organization to bring further creativity and attention to our strategic goals. We continually strive to have a broader impact on the world by becoming a better resource for mission-focused organizations and, in 2018, refined the ways we do this internally and through partnerships and innovation.

Through the projects we carried out in 2018, we extended positive impacts to a wide variety of organizations, groups, communities, and individuals. We helped build the capacity of organizations to evaluate their work, partnered with individuals and organizations who are contributing to positive social change, and enhanced the ability of other consultants to work towards positive social change. Each of our 80 projects affected their communities in some way, from large-scale projects with widespread impacts to smaller efforts with targeted impacts.

For example, in our most recent work with Minnesota's Home and Community-Based Services (HCBS), we provided support for a process of compliance with a new federal rule that centers people in making decisions about their own lives and care.

80

Projects creating
positive social
change

HCBS is a complex system of programs that keep Minnesotans who are elderly, disabled, or living with mental illness in home and community-based living settings and out of institutions like nursing facilities. Using our evaluation expertise and the deep knowledge developed over more than a decade of work in this field, we supported the development of protocols to ensure providers use person-centered care as well as a process to gather and analyze materials to gauge provider compliance. This work helped ensure that HCBS programs continue to thoughtfully serve the people who depend on their programs.

We also helped to shape new systems, as evidenced by our work supporting The North Dakota Council on Abused Women's Services (CAWS) in assessing community needs and funding decisions. CAWS is North Dakota's sexual violence and domestic abuse coalition, supporting and presenting a unified voice for the 20 crisis intervention centers statewide. We worked with CAWS staff to first conduct

environmental scan to assess community needs around sexual violence and then used the Technology of Participation (ToP) method to help the CAWS team determine how best to allocate their resources amid rapidly changing community conditions.

In these projects, and throughout our work, we strive to ensure that the results of our work will be relevant and useful for clients and their stakeholders. In closing meetings this year, clients described their intent to share findings with their field, use results to lay the groundwork for new or improved ways of delivering on their mission, and embed evaluation practices into their everyday work. Clients also expressed appreciation of the ways that we engaged stakeholders to refine their work.



Technology of Participation (ToP)

ToP is a participatory facilitation method for engaging groups in processes that support shared awareness, shared agreement, and committed action. ToP's foundational values are inclusive participation and profound respect for all.



GOAL 1: OUR PRACTICE SUPPORTS POSITIVE SOCIAL CHANGE

In 2018, we advanced our thinking and learning about how our practice can more powerfully support social change efforts by articulating our contributions to social change. Through reflection on the process of social change, our staff identified and expressed the value they find in engaging in multiple parts of the process, especially in early stages. Staff had a great deal of passion for work with stakeholder groups to reframe issues, explore new ideas, pilot efforts, and bring in new perspectives on issues. We affirmed that much of our work, and the strengths in our practice, align well with these kinds of efforts and identified five areas in which to deepen our practice:

We also examined ownership and leadership in evaluation, including sharing decision-making. Our Community-Responsive ApproachSM calls us to invite the expertise of community members to meaningfully shape projects and we use creative approaches to do so while responding to differing contexts, resources, and levels of readiness. For example, one project this year evaluated what impacts were sustained from grants implemented several years ago, in different countries, supporting farmers in rural areas. We worked with subcontractors in these countries to travel to the farmers, interview them

1. **Co-Creating Communication Plans** to help our clients be transparent about their learning with stakeholders and beyond for the broader social good
2. **Diversity and Equity Tools** we can use to help our clients and their stakeholders address, communicate and work across differences
3. **Helping Organizations with Systems-Thinking** to help our clients think bigger about their place in the ecosystem
4. **Build out our Community-Responsive** practices to deepen this practice, especially in stakeholder planning and engagement strategies
5. **Examine the Role of Evaluator as Influencer** to see what IG could be doing more of as a thought-leader or convener

about what they would find meaningful, and get their advice about how to engage their community more broadly. The results of this work informed an evaluation plan being implemented now, which includes farmer workshops to reflect on sustained impact. Early results have been positive, with strong participation in communities and relevant information to the granting organization.

Our Community-Responsive Approach was also integral in our one-year follow-up to the Olmstead Quality of Life survey for people with disabilities throughout Minnesota. In this project, community contractors who had direct, lived experience with disabilities helped plan outreach, engagement, and survey administration. Their advice has been invaluable in reaching a broad range of respondents to engage meaningfully and comfortably in the survey process. Similarly, in a project assessing communities of individuals with various gender and sexual identities in Omaha, we engaged subcontractors from within the community.



The subcontractors were essential in helping to consider what questions to ask and how to ask them in a way that would best inform the community assessment. This partnership increased participation within the community while simultaneously improving insights for funders planning a new grant-making initiative.

IMPACT

We created a clearer definition of social change and how our services contribute to it, built relationships with clients that are having a significant impact towards positive social change, and empowered others through our work in capacity building and training. We acted as a partner for innovation in the social change sector, with early work done to develop an innovation lab that we hope to launch in 2019. Through our Community Responsive-Approach and inclusion of community members, our projects were more participatory and relevant to stakeholders who often do not have input into evaluation—a benefit to our clients and their communities. We also supported the evaluation community by building human capital through interns and subcontractors. In 2018, two interns were recruited based on their interest in evaluation and life experience in communities underrepresented in our field and both have expressed an interest in remaining in the evaluation field. We brought more than 56 partners and subcontractors into our work, putting over \$600,000 back into the community.



GOAL 2: OUR WORK IS LED BY A JOYFUL, ENGAGED, POWERFUL TEAM

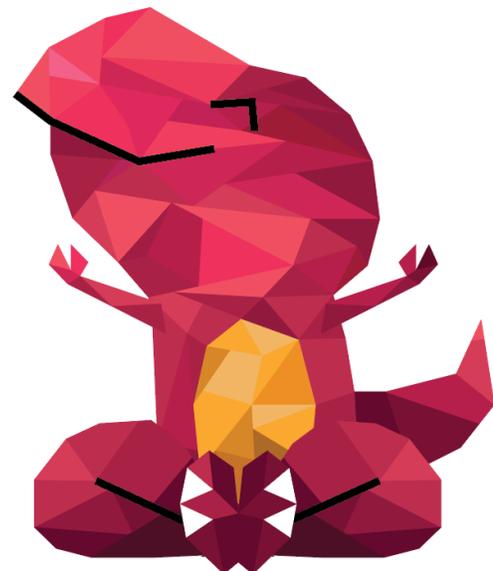
In 2018, we made significant progress toward our goal of becoming a joyful, engaged powerhouse, which has had considerable impacts on our staff, clients, and partners. First, to support our employees and their work, we declared 2018 as the year of mindfulness. As such, we formed a Mindfulness Committee, which provides tips, resources, and space for staff to find mindful moments. Our staff even offered a mindfulness zone at the American Evaluation Association's annual conference in Cleveland, which was very well received.

To complement our mindfulness emphasis, we have also focused on developing a positive work environment that supports employee self-care. Our Workplace Environment Committee supports a warm, welcoming atmosphere. One committee member converted a lesser used meeting room into a "personal retreat" area with a relaxed, calming feel that can be used for quiet work or small group collaboration. A separate wellness room offers a place for staff to close their eyes, relax, and recuperate and doubles as a nursing room.

Staff lunches, catered by local woman- and minority- owned restaurants, give our employees a chance to connect with each other.

During our busiest times, we created many group stress relief opportunities, including massages, games, a picnic, and even a therapy dog at the office. There is a strong emphasis on self-care during times of stress as well as the intentional fostering of joyful and rewarding work settings and experiences.

We found ways to support our staff in their personal and professional lives. Because of our belief that our employees' health and well-being is of paramount importance, we provide employees with earned safe and sick time (ESST) that exceeds the requirements of the City of Saint Paul. Additionally, we implemented a new policy that allows our staff to dedicate time from their work schedules to volunteer for projects they hold dear.





In 2018, The Improve Group created new opportunities for staff promotions and career advancement, including adding a Managing Consultant level and a specialization track that allows staff to advance by specializing in specific evaluation tasks. We implemented a new consultant-centered approach to teaming, which builds each project team based on staff interest and experience. We continue to build tools, provide training, and offer other supports to further support the consultant-centered approach and achieve its benefits.

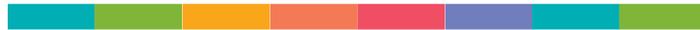
Across the organization, we made efforts to ensure our staff are compensated fairly and equitably. In addition to across-the-board market adjustments to our salary scales in September of 2018, twice during the year every employee at The Improve Group benefited from profit-based bonuses.

Our relatively “flat” compensation structure means that top paid executives receive less than 3 times the salary of entry level staff, and salary scales are shared transparently across the entire organization.

To champion our profession and the practice of evaluation, we implemented strategies to encourage young people embarking on their career paths and more experienced professionals seeking a change to consider the field of evaluation. Staff presented about evaluation as a career path at several conferences and campuses and we hosted a Careers in Evaluation Panel that was attended by more than 30 people. In collaboration with Global Minnesota, we welcomed a group of international fellows from several countries in Africa to discuss evaluation and its role in important civil society work.

IMPACTS

Our work toward this strategic goal greatly benefited our staff by improving our work setting and supporting personal and professional growth. These benefits, in turn, impact our clients and partners, who work closely and collaboratively with our staff. Our continued refinement of our consultant teaming structure has provided many benefits, especially in creativity and collaboration. Projects are led by team members with passion for and relevant experience in the type of work evoked by the project. The approach brings unique talents, new ideas, and more clarity, and ensures accuracy and quality to the work we do.



GOAL 3: OUR SERVICES ARE EXPANDED AND REVENUE DIVERSIFIED TO INCLUDE MARKETABLE PRODUCTS AND TOOLS

As we ventured to develop marketable products and services in 2018, we were focused on finding innovative ways to work with a wide variety of organizations at different resource levels to build capacity and increase impact. Three products are in the pipeline, including training in evaluation (launched in 2018), an evaluation planning tool (being piloted) and an innovation lab (in development). In our existing work, we searched for innovative ways to improve efficiency and effectiveness with clients. For example, in our work with the Minnesota Department of Human Rights, we developed a framework for evaluating civic engagement efforts of state agencies. The framework approach provides an efficient pathway for state agencies to engage in evaluation on their own.

Another strategy to achieve our goal of expanded services was to partner with other organizations to reach agencies, groups, and community members to spark interest in evaluation. We teamed up for an eleventh year with the Minnesota Council of Nonprofits to offer training on a variety of topics to build evaluation capacity among nonprofit leaders. The Improve Group was the first organization to use MCN's virtual training platform, which provides a more accessible format for people throughout the state to participate in trainings.

We also included capacity-building elements into our projects with clients, particularly for under-resourced organizations. For several organizations, we provided training on the Technology of Participation facilitation method, which helps multiple perspectives to emerge and bring people to consensus. Within several projects we trained our clients to develop logic models, create surveys, or do other evaluation tasks. To support the new evaluation capacity among our clients, we recorded videos and voiceover materials so they could successfully manage their own data collection and do their own reporting.



In 2018, we contributed to several publications that sought to build an understanding of and use of evaluation.

For another year, we evaluated the Minnesota Council of Nonprofits' Annual Conference and, for the first time, experimented with using gamification as part of our data collection. This "pop-up" evaluation highlighted that evaluation can be simple, fun, and implemented in a variety of venues. Many attendees remarked that they would bring these ideas back to their organizations to use.

IMPACTS

The activities and efforts to develop marketable products and services led to some interesting outcomes. First, we

deepened our relationships with partners, clients and other organizations. For example, as we sketched out our innovation lab concept, we partnered with one of our long-time clients to broaden both our perspectives and use a tangible scenario to help further develop the concept. Secondly, several of our efforts involved more of a mass audience, which significantly expanded our reach and impact. Finally, we strengthened our clients' interest in and capacity to do their own evaluation through capacity building projects. This will have far-reaching effects for the groups and individuals served by our clients.

ROADBLOCKS

In addition to our many successes, we encountered and addressed some challenges in 2018. First, we learned that our staff and stakeholders think about positive social change in different ways, which can cause confusion and make it more difficult to work toward a shared vision. During the year, we began to more clearly define what we mean by positive social change and where we can have the greatest influence. As in previous years, 2018 affirmed that the pace of change for the impacts we are trying to achieve through our work can take many years and careful, deliberate, committed attention to come to fruition.

Over much of 2018, we had open positions and experienced staff turnover. We were sad to say goodbye to colleagues and at times questioned whether we were on the right track. In order to explore this more fully, we engaged staff through committees, in staff meetings, and in retreats to create the culture we want. We are excited for 2019 and the opportunities it presents to continue to nurture a joyful, powerful culture.

ON THE HORIZON: GOALS FOR 2019

We are excited for 2019 and look forward to deepening our public benefit by continuing to work toward our three strategic goals. In 2020, we will launch a new strategic planning effort to develop plans for the next several years.

The **Improve** Group

**Creative
Insightful
Irrepressible
Committed to a better world**

