Testing Change project
2014-2023
Final report

Where we started

The Civil Society and Testing Change project (later shortened to Testing Change project) started in 2014 with a small group of colleagues from around the world. We were looking to fill a missing gap in our approaches to significant change and be one piece of the puzzle (hence the puzzle logo) working with as many others as possible in our 'shared space' and sharing our learning freely. The need for 'change' was being talked about but was not yet part of the agenda for many organizations. It was the multi-year testing period, crucial to significant change, that was a missing piece and became our focus.

The project was designed to (1) develop and test new ways of operating that could be used by any civil society organization looking at how to adapt their organizational operations to address these significant changes; and (2) evaluate and share the learning as widely as possible in the global civil society community.

The profile of our target groups was developed as organizations approximately 10-30 years old, medium sized, with a leadership committed to staying innovative, and enough staff capacity to try some new things. It was felt that this group could most benefit from testing new ideas within peer groups and have the best chance of making some changes.

We wanted to look at the range of issues that civil society leaders need to navigate to re-orient their approaches in order to increase greater impact from their efforts. The Steering Group thus identified a number of issues we could focus on. The original list included new approaches to assessing impact, multi-stakeholder collaboration, new operational models, integrating youth into organizational decision-making, new leadership skills and approaches, and new models of resources for change.

As our Steering Group worked to design the project some of the initial lessons we learned from other efforts we studied included:

- Spend time on your 'pre-conditions' including strategic direction, people (building trust) and resources. Taking the time to do this – building a foundation – is not 'wasted' time. (This preliminary work can take a few years, be patient).
- Commit to your strategy, while trying different approaches. Stay flexible.
- There's a difference between new tools and approaches that help to optimize what you already do and those that are more transformative (paradigm shifting), and it can be easy to confuse the two. Keep asking challenging questions vis a vis your goals.

How we worked

Although initially we thought to have 3-5 working groups run simultaneously (to simulate how executive directors need to deal with multiple challenges at once), due to capacity challenges, we started groups as we had lead organizations and could manage the working groups' activity. We thus had sequential rather than simultaneous groups. Over the course of the project we had three working groups on youth integration, impact assessment and leadership.

Early on in the project, one of the initial Steering Group members referring to the African proverb, "If you want to go fast, go alone. If you want to go far, go together," noted that although this is certainly good advice, sometimes you may need to start alone to go fast and get an initiative started. He also noted that going alone (being different than your peer organizations) and innovating takes a certain amount of risk which is not always appreciated by boards or other leaders (especially in membership organizations or networks) and there can be a creative tension between alone and together. For the Testing Change project, hoping to have the capacity to conduct simultaneous working groups and have the synergy of learning from each (as in a real world environment), it took a while to start our first initiative. We gained momentum when another entrepreneurial Steering Group member, being less risk adverse and realizing the value of 'proof of concept', said "let's just start doing something." That nudge proved to be extremely helpful to getting the project started.

Due to funding constraints and to be more globally inclusive, we worked primarily virtually. In addition to many virtual meetings, we also had two in-person roundtables (coordinated with key participants being together for other meetings) to start the youth engagement and impact assessment working groups; and one in-person meeting for the full project in 2019.

The Steering Group membership changed a number of times over the life of the project (with one member staying with the group the full time!). Approximately 12 organizations (fitting the profile) have participated in the community with other participants from NGO support organizations and academia as well. (See the listing in the Appendix)

Timeline
Identifing the crucial steps on our way to Testing Change
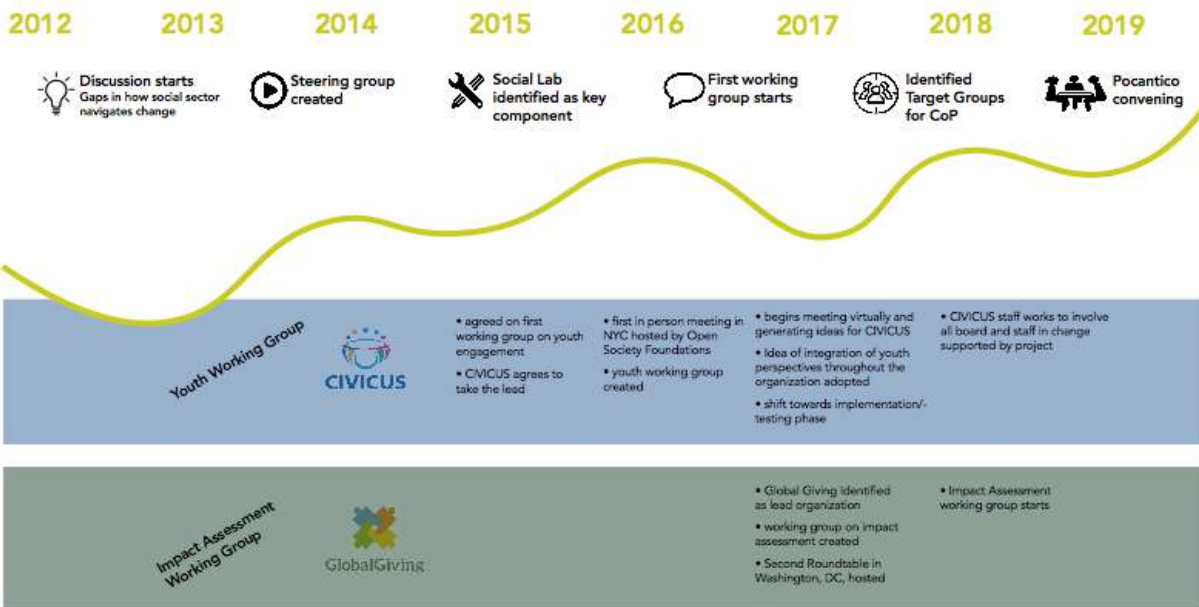
What we learned

The project was started as a project and not a new organization as it was not intended that it would go on forever. After almost a decade it seemed to be the time to wind it down and look for ways to share our lessons and look to next opportunities for collective exploratory work. Our wind down included a virtual roundtable in November 2023 (a format that worked well for us over the years) to share some of our reflections. Some of these included:

- Someone has to be the 'pioneers'. Focusing on change efforts is now more common but at the time the Testing Change project started in 2014 it was not as 'mainstream'. As we navigate multi-year paradigm change, we need innovative collaborative projects that keep moving us forward.

- We were able to bond a diverse community virtually. It is not easy, but it is doable and may be a good model of how to create important connections virtually. During the course of the covid pandemic (2020-2022) when in-person meetings were not possible, we all got better at working virtually but there is still a tendency to steer to the in-person gathering as the 'better' option. While there is much value to meeting in person, doing more meetings virtually has the added benefits of creating wider accessibility (involve more people that may not be able to travel as easily), being less costly in time and money, and reducing our carbon footprints. One-on-one conversations outside the working group

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meetings also helped some participants build rapport and understanding that can be hard to do in a time constrained full group meeting. Group work on collective documents online also helped bring the working groups together.

- Holding space to discuss change initiatives with peers is critical to learning and adaptation but it is hard to find the time to do. Collaborative projects like this provide the space for reflection that day-to-day work doesn't allow. Having thought partners, and having time and space held for this work, can help leaders stretch their own and their organization's limits and see new possibilities. (For example, the CIVICUS youth program leadership felt that the Testing Change collaboration was an important partner to CIVICUS in its youth engagement initiatives).

- Change is a continuous process. Learning together can help us get a better sense of how our actions/interventions (as practitioners or donors) may need to be modified, and/or assess how they make be making a difference.

- It is intentional work to lead and adapt one's approaches. Learning has to be personal, organic and agile, but leadership can be lonely and having peers to share with in a more structured way can give you the support you need to continue on. A diverse group of peers can also bring in different perspectives.

- Paradigm change, like other types of changes, *needs practice* to change our mind-sets and behavior patterns. This may call for strong and creative facilitation to encourage people to not fall into accustomed tracks but continually step off of them. We were somewhat surprised at how easily all of us (even those of us who consider ourselves 'change agents') fell into these patterns and how important it is to be intentional about changing patterns we have become accustomed to.

- Effective organizational and systemwide change needs to be supported by high level commitment (that is sustained through leadership changes), accountability to multiple stakeholders, and resources to make the time for change initiatives. The way most organizations are currently structured can lead to unintentionally siloed learning patterns. We tried to intentionally work on keeping senior staff engaged (even when we were working in an issue or department specific area) so the work would be fully integrated into the organization's operations and wouldn't get siloed into the staff working on the specific issue area.

- In multi-year projects people may change positions and you need to have ways to bring people in and out of the process. Even when someone is able to continue for a number of years, practitioners in the civil society space are under so much time pressure there has to be an accommodation to people not being able to make some meetings. A practice of regularly sharing notes and having them in an easily accessible place can help with continuity.

- Collective ownership is hard to develop. This was a challenge for us. Is it because organizations/networks doing similar work compete for funds? Constraints with our time? Is it not valued enough?

- More resources for collaborative efforts are certainly needed to help make these types of efforts a priority. In collaborative initiatives someone needs to have as their focus keeping the momentum and priority level, and practitioners need to have the time they spend on these efforts valued. How do we better incentive collaborative efforts / working together towards a common purpose so they are better resourced?

A number of Testing Change participants reflected on their experience with the project:

- Space for reflection is not embedded in the designs of our organizations or expectations of our daily work. The ability to talk to peers on a regular basis is extremely valuable. Participants in the project (all senior level leaders) have noted the importance of shared learning, space to reflect, and having peers and partners outside of their traditional networks doing similar work, all to have been benefits to being involved with the project, and important to strengthening their own work as change leaders. *~ Anabel Cruz, Founder Director of the Instituto de Comunicación y Desarrollo (ICD)*

- Reflective spaces and sharing with others going through similar challenges is rare but yet so key. It is energizing and affirmative and helps generate new perspectives and ideas. When there is more clarity around our work and systems are improved, new opportunities open up. *~ Janet Mawiyoo, former CEO of the Kenya Community Development Foundation*

- Having Testing Change as a thought partner to CIVICUS in its journey towards greater youth engagement over multiple years was a unique opportunity. It helped to stretch our limits and the possibilities for where we could go. Holding the time and space to engage with colleagues over the time it actually takes for change to happen was very important. *~ Amy Miller-Taylor, former Chief Strategy Officer, CIVICUS*

Each of our three working groups were different. Here is a summary of how they worked and some take-aways:

Youth engagement specific

Our first effort, the youth engagement focus, led by CIVICUS, started in late 2016. CIVICUS was interested in increasing youth engagement in the alliance and saw the Testing Change project as a way to support their efforts. The first working group's task was to generate ideas for CIVICUS to possibly test around how more effective youth engagement could impact its work.

Through a modified design thinking process (conducted virtually) eight ideas were generated and voted on by the group. *Magda Mook, CEO of the International Coaching Federation* and a member of the youth engagement group noted that "We all are tempted to stop immediately

when we arrive at some decisions or conclusions. Instead, it worked well for our group to stay in the question, to inquire about all different aspects of the proposed decisions and to push back a little in order to examine all the facets of the issue at hand. That resulted in a better end product and solid recommendations."

Four ideas were sent to CIVICUS and one was chosen:

Consciously integrate youth perspectives into all products and services and the work of the organization.

CIVICUS began its testing period in the latter part of 2017. A second working group was created for this second phase of the initiative which included representatives of other groups working to implement something similar who could function as a peer learning group. We wrote about some of the initial lessons we learned about the multi-year change process in 2018.   These included that in initial discussions when developing a new initiative, the CIVICUS staff has made an effort to include more youth organizations as partners. One partnership with a youth organization in Brazil resulted in over 2,000 people attending 10 events. The organizers believe that many of those who attended were 'young people who wouldn't normally engage in social action'.

In 2022, we held a final roundtable. Some of our learning after the five year multi-year testing period was as follows:

Youth used to be a constituency that CIVICUS was serving, and now youth activists are themselves sought after for advice and are the ones requesting meetings and sharing information. It has been a spectrum that has gone from creating space, to participation, to engagement, to looking at the 'why' of engagement. CIVICUS is now systematizing the needed change and the whole organization is beginning to work differently. Cohesion throughout an organization can be hard and this has taken much effort, attention and years and continues to need effort.

To be successful there is a need:

- For clarity of purpose and matched expectations between youth and the organization.
- To compensate youth for their time.
- To invest in a solid foundation to forward this work.
- To create spaces for intergenerational dialogue and learning.
- Commitment at the highest levels of the organization.
- Keep momentum through staff and leadership changes.
- Avoid falling into organizational silos and keep everyone in the organization involved.
- Allocate adequate resources and maintain an on-going organizational commitment.
- Understand that change happens from within.
- Determine how to assess the change and its impact on the organization's mission.

Outcomes from CIVICUS as the lead testing organization:

- Increase in visibility of youth in its strategic priorities and programming.

- Increase in visibility of CIVICUS as a resource for meaningful youth participation (with resources to make this happen).
- Increase in understanding how to enhance youth resources and engagement practices (in order to make a meaningful impact).

    Example: creation of a youth compensation guide (renumeration for youth participation that wouldn't have otherwise been possible) was encouraged by a group of peer organizations.

- Significant increase in youth membership (under 30)

Impact assessment specific

We began to explore impact assessment as a possible next working group in 2017. Here is somewhat of what we discussed at a roundtable: https://www.goinginternational.com/2017/11/15/continuing-to-explore-impact-assessment/

The impact assessment working group then started their work in 2018 to look at how to better evaluate impact with a lead testing organization. After initial discussions around identifying new approaches to evaluation, including Outcome Harvesting, and the Asia's Foundation Strategy Testing Model, the group helped lead organization Global Giving think through an idea to test. Most of the focus was on further developing indicators to determine if organizations are indeed community led. This was viewed as important to help Global Giving know whether it is changing the flow of funding toward community-led organizations. This group finished its work in early 2020 when a change in Global Giving's leadership led to a change in priorities and was no longer aligned with the Testing Change project.

Some take aways shared:

- Assessing impact and/or evaluating an initiative are broad concepts. They can focus on accountability and/or learning. We are often moved in the direction of accountability by our donors and other stakeholders, but we can choose how to balance our focus and develop processes to learn how to improve our work to strengthen actual impact.
- There is less correlation between time invested (teaching, training, etc..) and impact than one might expect and it can be hard to assess impact. For example, you can spend a lot of time holding an in-person event and then find out (almost in passing) six months later that something at the event had led someone to take a transformative step. This argues for having a number of different pathways (not to be too prescriptive) as you don't always know what will lead to the impact.
- There's a difference between new tools and approaches that help to optimize what you already do and those that are more transformative (paradigm shifting), and it can be easy to confuse the two.
- It takes more time, but moving towards qualitative approaches such as individual interviews and focus groups can help to see who may have changed their behavior based on engagement with the organization and its programs.

Pablo Rodriguez-Bilella, professor at the Universidad Nacional de San Juan in Argentina, and a member of the impact assessment group focused on the important bridging strength of the project noting that *"The stress and emphasis of this project in paradigm change and learning around impact assessment matches some of the most vital and present concerns of the evaluation community."*

A resource list from the work the group had done was created (and periodically updated): https://docs.google.com/document/d/1wpV6rkx9ls2DZaPhKFJ9m-akEu32MwmA4OMLl70kb0w/edit

Leadership specific

The type of leadership needed to navigate significant change was always implicit in our work but as the project evolved it became more evident to the Steering Group that a specific working group on leadership could be a valuable piece to the change puzzle. Our research and roundtable of some of those involved in this field held at the end of 2020 validated that although there are many excellent leadership programs that help leaders to strengthen their skills and broaden their approaches, few had a peer group go through the process together of applying these approaches directly to their leadership of their current organization and particular changes they were trying to implement.

A global working group of executive directors started in early 2021 to look at the question of what new leadership approach they might want to test in their organization. The initial tests were: (1) Minimize the internal conflict between compassion for staff and accountability for work that needs to get done; (2) How to make a distributive leadership model more visible? (3) Building and sustaining a team that lives out the organization's values; and (4) A stronger succession plan for when leaders leave the organization.

The group met for close to two years. Some of our learning after the multi-year testing period was as follows:

- Learning and relearning how much a leader's own actions, reactions and perspectives influence the team, especially through a change process.
- The importance of process ownership to successful change.
- A better understanding by leaders and among team members on the advantages of participatory decision making. For a leader not having all of the responsibility can actually be uplifting.
- External factors (eg pandemic, elections, economy, civil unrest, etc..) play an important role in often disrupting the best of plans.   The tests evolved over the multi-year testing process depending on what was happening externally. Agility and resilience approaches are important to have and practice. How to stay proactive within the new context?
- In change processes, things can feel worse before they are better. This is where peer support can be very helpful.

Shared one participant:

Leadership, and cultivating other leaders on your team, is very intentional work. Time to reflect and process with peers is invaluable. ~ *Amy Sample Ward, CEO, NTEN, nten.org*

Summary report written by:

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With special thanks to:

Steering Group members (through the project's lifespan)

Anabel Cruz, Uruguay Communication & Development Institute
Blair Glencorse, Accountability Lab
Janet Mawiyoo, Kenya Community Development Foundation
Amy Miller-Taylor, CIVICUS
Eddy Perez, Climate Action Network
Magda Mook, International Coaching Federation
Michael Silberman, Mobilisation Lab
Danny Sriskandarajah, CIVICUS

Working Group leads

Elisa Novoa, CIVICUS – Youth Engagement
Alison Carlman, Global Giving – Impact Assessment
Joy Zwadi, AkiliDada - Leadership

Note – All affiliations were at time of project participation (a lot can change in 10 years ☺).

June 2024

APPENDIX

Timeline

- Steering Group started – February 2014
- Roundtable for youth engagement, NYC – July 2016
- Youth engagement group started – November 2016
- Impact assessment roundtable, Washington, DC - November 2017
- Impact assessment group started – January 2018
- Youth engagement group ends work – April 2018
- In-person conference for full project, Pocantico, NY – May 2019
- Second youth engagement workgroup started – November 2019
- Impact assessment group ended – February 2020
- Leadership roundtable – December 2020
- Project highlighted as focus of Accountable Now workshop – December 2020
- Leadership group started – April 2021
- Youth engagement group wrap-up – June 2022
- Leadership group wrap-up – March 2023
- Final roundtable – November 2023

Note: Unless location listed, all other meetings were virtual

Participating Organizations

Profile of target groups: approximately 10-30 years old, medium sized, with a leadership committed to staying innovative, and enough staff capacity to try some new things.

These are groups that have been involved in the project over its ten year lifespan:

<u>Community</u>

Accountability Lab
Accountable Now
Akili Dada
CIVICUS
GlobalGiving
GlobeMed
Global Health Council
International Coach Federation
Nonprofit Technology Community (NTEN)
PACT Foundation
Restless Development
West African Civil Society Institute (WACSI)

Amnesty International
Kenya Community Development Foundation
PLAN International
Publish What You Pay
Uruguay Communication & Development Institute

Other background

Documents (online)

Introduction and history March 2022
https://docs.google.com/document/d/1v6d5tKyxM3u1k8GNk3-wzED3IiG_JYYE37U-qKptRTg/edit

Initial Learning as of July 2016
https://docs.google.com/document/d/1NemYLGSj6fFcnNQOgSQvxZ2XsaQ6FVgaQ6AnKYNamNY/edit

Project Executive Summary, May 2019 https://www.goinginternational.com/wp-content/uploads/2020/05/CSTS_Executive_Summary_05.20-3.pdf

Word or google docs or PDFs

Project infographic, June 2024 (PDF)

Project carousel, June 2024

Youth Inclusion Process infographic, June 2022 (PDF)

Leadership Roundtable notes, December 2020

Impact Assessment Roundtable notes, November 2017

Youth Engagement Roundtable notes, July 2016

Blogs

Civil Society and Significant Changes, are We ready? June 2013,
https://ssir.org/articles/entry/civil_society_and_significant_changeare_we_ready

TestIt! July 2016 https://www.goinginternational.com/2016/07/26/test-it/

From Youth Engagement to Integration, August 2016
https://www.goinginternational.com/2016/08/09/from-youth-engagement-to-youth-integration/

TestIt! – Lessons we are learning, February 2017
https://www.goinginternational.com/2017/02/28/test-it-lessons-we-are-learning/

TestIt! – The project continues, August 2017
https://www.goinginternational.com/2017/08/23/test-it-the-project-continues/

Continuing to Explore Impact Assessment, November 2017,
https://www.goinginternational.com/2017/11/15/continuing-to-explore-impact-assessment/

TestIt! Lessons we are Learning, Part II, April 2018
https://www.goinginternational.com/2018/04/24/test-it-lessons-we-are-learning-part-ii/

Testing New Leadership Approaches (initial) – September 2021
https://www.goinginternational.com/2021/09/22/testing-new-leadership-approaches/

Youth Inclusion wrap-up – what we've learned June 2022
https://www.goinginternational.com/2022/06/07/youth-inclusion-what-weve-learned/

Resource lists

Impact Assessment https://docs.google.com/document/d/1wpV6rkx9ls2DZaPhKFJ9m-akEu32MwmA4OMLl70kb0w/edit

Youth engagement
https://docs.google.com/document/d/1BfrjlvgC7uJ_bD1jzYEN4HzEFi1a6eQRYpUzhUurFro/edit?pref=2&pli=1