**Organizational Reach and Influence: A tool for social enterprises in health**

**Template Table**

*\*Further detail on the indicators provided on pages 4-6.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Items/Indicators** | **Time Period**  *(e.g., 2016, Q1 2017*  *(annual or quarter)* | **Target** | **Tracked Value**  *(Record fields as text, count, y/n, or selected category***)** | **Priority** *(High, Med, Low)* | **Notes** |
| **Partnerships or Relationships** 1,2,3,4,5 | | | | | |
| Number of Formal Partnerships/Relationships |  |  |  |  |  |
| Names and types |  |  |  |  |  |
| Content of partnership/relationship as *practice or clinical* (e.g., national accrediting bodies, prof associations)  *Describe*: |  |  |  |  |  |
| * Geography:   sub-nat’l, nat’l, regional, global |  |  |  |  |  |
| * South-to-South |  |  |  |  |  |
| Content of partnership/relationship as *policy-related*  (e.g., district, sub-national regional, national officials, global bodies)  *Describe:* |  |  |  |  |  |
| * Geography:   sub-nat’l, nat’l, regional, global |  |  |  |  |  |
| * South-to-South |  |  |  |  |  |
| Reach of partners |  |  |  |  |  |
| Direction of Knowledge Transfer |  |  |  |  |  |
| * Outward to others |  |  |  |  |  |
| * Inward to organization/personnel |  |  |  |  |  |
| * Bi-directional |  |  |  |  |  |
| Partner’s use of your product/service |  |  |  |  |  |
| Receive Timely Responses |  |  |  |  |  |
| Funds leveraged through partnership/relationship |  |  |  |  |  |
| Contributions or investments into existing infrastructure *(Describe)* |  |  |  |  |  |
| **Education/Training**4 | | | | | |
| Influence on Educational Curricula |  |  |  |  |  |
| * Level of Influence (national, local) |  |  |  |  |  |
| Project is a Training Site |  |  |  |  |  |
| * Number of Trainees/Participants |  |  |  |  |  |
| Focus Population for Education/Training |  |  |  |  |  |
| Capacity-Building |  |  |  |  |  |
| * Number and type of informal or applied capacity building efforts |  |  |  |  |  |
| * Examples of diffusion of knowledge or second-tier capacity building |  |  |  |  |  |
| * Examples of content or process improvements with a partner |  |  |  |  |  |
| **External Visibility/Perception**4 | | | | | |
| Expertise Recognized |  |  |  |  |  |
| * Invited Speaker |  |  |  |  |  |
| * Invited Chair/Reviewer/Facilitator/Advisor |  |  |  |  |  |
| * Invited Presentations |  |  |  |  |  |
| * External Consultation |  |  |  |  |  |
| **Publications**4 | | | | | |
| Published Articles/Studies (peer-reviewed) |  |  |  |  |  |
| Published Articles (non-peer reviewed) |  |  |  |  |  |
| News Stories by media |  |  |  |  |  |
| Newsletters or Briefs |  |  |  |  |  |
| **Advocacy**6,7 | | | | | |
| Social Media Outreach |  |  |  |  |  |
| Works Cited By |  |  |  |  |  |
| Blog Reach |  |  |  |  |  |
| Increased Public Involvement |  |  |  |  |  |
| New Advocates or New/Existing Champions |  |  |  |  |  |
| Media Partnerships/Earned Media |  |  |  |  |  |
| **Cross-Sector Impact**2 | | | | | |
| Sector-Crossing Influence |  |  |  |  |  |
| Number of Sectors/Organizations Influenced |  |  |  |  |  |
| Level of Influence (low vs. high) |  |  |  |  |  |
| Intervention or Model Replication |  |  |  |  |  |

**Descriptions of Table Items/Indicators**

***Partnerships: Any formal exchange (financial or non-financial) with groups or organizations that may be occurring or planned.*** Examples include joint grants, an MOU, sub-contracting, fellowships, and network membership. Highlights the scope and reach of your own organization through partnerships with other organizations, and provides strategic assessment of each partnership.

***Relationships: An informal exchange, collaboration, or connection (financial or non-financial) with individuals, groups, or organizations that may be occurring or planned.*** Examples include trusted unpaid advisors, potential sub-contractors, and non-formalized relationships with organizations. Highlights the scope and reach of your own organization through relationship with other organizations, and provides strategic assessment of each relationship.

*Notes on Partnerships and Relationships*:

* Section suggestions:
  + List all relevant partners or relationships separately along with their content, reach, direction of knowledge transfer, etc. as targets and priorities will differ by type of partner. Copy and paste any relevant rows to capture the information for as many partners as desired.
  + Prioritize and list only those partners and relationships determined as relevant and strategic.
  + In few cases, an entity may be both a partner and in a relationship with your organization. Overall, partners will generally not fall under the relationship indicator as well.
* Names and types: List out each partner /relation (e.g., NGOs, government, industry, academic) and the their corresponding type of partnership (e.g., sub-contractor, grantor, advisor, coalition, etc.) Descriptive text field.
* Content of partnership ***as practice or clinical*** & Content of partnership ***as policy-related***: Whether the partner/relation is practice/clinical or policy-related is potentially important distinction to make based on your organization’s strategies. Within the content, the geographic scope/reach of the partner/relation may be recorded and any South-to-South connections where learning, sharing, and collaboration may be important to document. Select a category (e.g., district, national) and/or include a Descriptive text field.
* Reach of partners/relations: Intended to briefly capture their scope of influence, depth of connections, perceived influence in the field. Text field or consider categorizing into narrow vs. broad and superficial vs. deep.
* Direction of Knowledge Transfer: Refers to who is providing, sharing, or benefiting in a partnership/relationship. Are both organizations benefiting? Is one giving more than the other? Is your partner giving you technical assistance or are you providing technical assistance? Select the appropriate direction.
* Partner/Relation Use of Your Product/Service: Use of your product/services, processes, frameworks, SOPs by your partners or relations. Note use in guidelines, service deliver, program decision-making, adaptations or translations, reprints or reuses. Yes/No or Descriptive text field.
* Receive Timely Response: This indicator is most relevant to partnerships/relationships with government officials, departments, or other decision-makers. Consider using responses within a reasonable timeframe to be a proxy for support and interest. Yes/No or Descriptive text field.
* Funds Leveraged through Partnership/Relationship: Yes/No, Amount of Funds, &/or Descriptive text field.
* Collaboration/Partnership with Existing Infrastructure: Describe the organization’s contributions/investments into the existing infrastructure. Text field.

Education/Training: Intended to capture the influences of your organization on an educational level, as well as focusing on training provided through your organization’s work and projects.

Influence on Educational Curricula/Level of Influence: Has there been an influence on educational curriculum and if so, was it on a national or local level? Consider influence in teaching, counseling, health education, community outreach, and other areas. Yes/No &/or Select appropriate level (national or local).

Project a Training Site/Number of Trainees & Participants: If the project is also a training site, count the number of individuals who undergo training and participate. Yes/No &/or Count.

Focus Population for Education/Training: What group is targeted with your outreach: individuals from the local community, healthcare professionals nation-wide, etc.? Categorize and specify the type of population.

Capacity-Building: Intended to capture potential results from your organization’s education and training efforts. Descriptive text field or complete sub-indicators.

* Number and type of informal or applied capacity building efforts: Count, Descriptive text field, or categorize and specify type of efforts (e.g., weekend workshop, sharing of SOPs, etc.)
* Examples of diffusion of knowledge or second-tier capacity building: Expand on times when another group shares information you originally provided, shared, or trained. Descriptive text field or Categorize.
* Examples of content or process improvements with partner: For example, improved M&E systems, revised HMIS, revised SOPs, etc. Descriptive text field or Categorize.

External Visibility/Perception: Intended to capture the visibility of your work with stakeholders and external audiences (outside of advocacy).

Expertise Recognized: Indicators that highlight others’ recognition of either a leader within your organization or your organization itself.

* Invited Speaker: Examples include invitations to speak at a conference keynote, TED talks or other speaking sessions. Descriptive text field, Count, &/or Categorize.
* Invited Chair/Reviewer/Facilitator: Captures invitations to serve in an advisory role. Examples include invitations to expert review committees, technical advisory groups, or chairing a panel presentation or talk. Indicate regional, national, or global if relevant to your missions and strategy. Consider leadership roles in particular. Descriptive text field, Count, &/or Categorize.
* Invited Presentations: Invitations specifically for presentations at conferences or events. Descriptive text field, Count, or Categorize.
* External Consultation: Count or describe opportunities for, or completion of external consultation. In tracking, consider the pros and cons to external consultation. What is the purpose? Consider the benefit to the organization, alignment with your mission, the opportunity cost, and pro bono vs. paid consultations. Descriptive text field, Count, or Categorize.

Publications: This indicator broadly refers to organizational presence in variety of publications specified within the sub-indicators below.

Published Articles/Studies (peer-reviewed): The number of peer-reviewed articles/studies your organization or staff members have contributed to; within the notes section examples of journals or specific articles may be given. Count.

Published Articles (non-peer reviewed): The number of non-peer reviewed articles the organization or members of the organization have contributed to; within the notes section examples of journals or specific articles may be given. Count.

News Stories by media: The number of news stories available provided by your organization or work picked up by the media. Count.

Newsletters or Briefs: The number of newsletters or briefs released by the organization itself. Count.

Advocacy: Intended to help capture whether an organization is seen as a credible source on an issue, as well as the level of public awareness of the issue or organization.

Social Media Outreach: Detail the social media application used by your organization utilized and make note of statistics (e.g., Twitter: number of followers, hashtag use, re-tweets, and number of key followers). Count and Descriptive text field.

Works Cited By: The number of times the organization or organizational work (e.g., publications and/or projects) are cited by others. Count.

Blog Reach: Posts or blogs written by the members of the organization (this may be on the organization’s own blog or an external publication such as Huffington Post), the number of times it has been viewed or shared. May also track number of blogs. Count.

Increased Public Involvement: Social media reach of others outside your organization (e.g., number of re-tweets or hashtags created around organization or issue of focus). Count &/or Descriptive text field.

New Advocates: Those previously unengaged who now taken action in support of your organization/issue. Count &/or Descriptive text field.

New/Existing Champions: New or existing high-profile individuals who publicly advocate/support your organization and/or issue. Count &/or Descriptive text field.

Media Partnerships/Earned Media: Evidence that a media company promotes a cause or showcases your work. May be measured through the number and types of media partnerships. Earned media refers to publicity gained through promotional efforts other than advertising. Count &/or Descriptive text field.

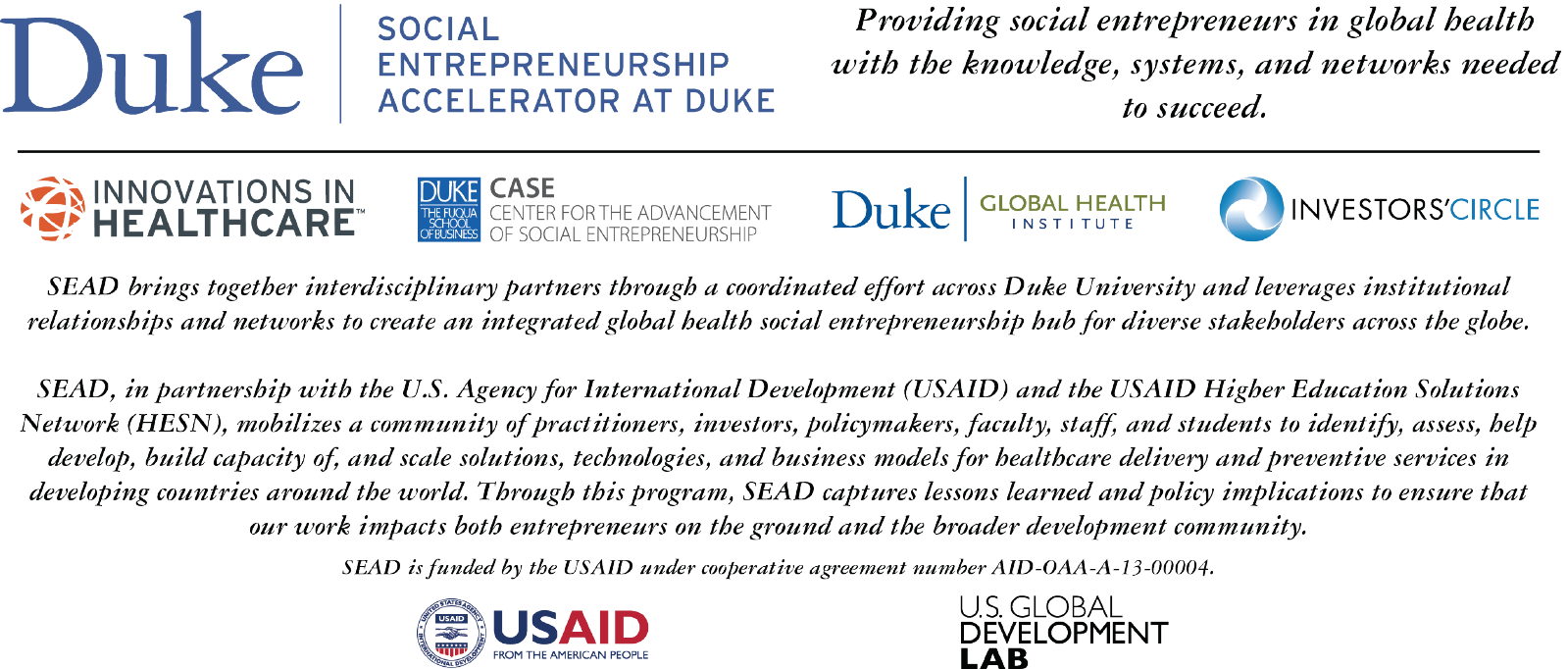
Cross-Sector Impact: Focuses on the broad impacts an organization may have beyond their specific realm of work, spreading to other fields and sectors.

Sector-Crossing Influence: Highlight the different sectors influenced by your organization’s work. Descriptive text field.

Number of Sectors/Organizations Influenced: The number of varying sectors or *cross-sector organizations* that have been influenced by your organization or work. Count.

* Level of Influence: For each sector, cross-sector organizations or groups influenced, identify the level of influence, i.e. was it high or low? Select high or low, or Categorize.

Intervention or Model Replication: Describe any replication in a non-health sector. May have beneficial or negative effects. Consider situations like co-partnering, franchising, being initiated by your organization, or external parties initiating replication.



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