



Finding the Epicenter of Social Impact

Relationships, Ideas, and Action Originating at the Opportunity Collaboration

Typically, evaluating a conference involves feedback forms filled out during the event with questions about quality of session content, relevance, venue, and other issues directly related to the actual gathering. Rarely are professional gatherings assessed for the results they produce *following* the few days offsite.

Last year, I attended the Opportunity Collaboration precisely because I understood it to be a “different” kind of conference, in fact, not a conference at all. Once there, I met the event’s creator, Jonathan C. Lewis, and congratulated him on a good turnout. Jonathan – not realizing that I run a social impact evaluation firm – replied that the turnout only matters if the event advances tangible poverty alleviation efforts. My very next question to him was how the Opportunity Collaboration would measure progress against this ambitious goal. This evaluation project was born out of that dialogue.

Designing an evaluation of the real-world effects of a conference requires both a long-term perspective, and a set of shorter-term benchmarks that can provide early evidence of change, or lack thereof. The first step in a typical study would be to define these benchmarks, identify measurable indicators, and systematically gather data, both qualitative and quantitative if available. The challenge in using this approach, however, is that the Opportunity Collaboration by itself does not create outcomes. It is the *interaction* between Delegates and the event itself that is critical to the generation of results. Our first step in measuring longer-term progress in poverty alleviation was to understand the experiences of different Delegates.

The current study is a qualitative inquiry into the range of outcomes experienced and created by 2009 Opportunity Collaboration Delegates. See Change identified a non-random sample of Delegates representing all categories of participants: leaders of foundations, social enterprises, investment funds, nonprofits, media organizations, and consultants. We intentionally sought out Delegates who had positive experiences, because it was precisely these experiences we wanted to understand in the first stage of this inquiry, to develop an authentic taxonomy of possible positive outcomes.

Even within this small sample, there was a range of positive experiences. Delegates pointed to outcomes ranging from new relationships and broader networks to millions of dollars being committed to new projects. For the most



concrete outcome stories, we followed up, and sought additional detail from Delegates about what made the Opportunity Collaboration experience work for them. The stories are presented as five brief case studies, available at the Opportunity Collaboration website:

- ◆ **Hathay Bunano, Bangladesh - A Social Enterprise: Gaining the Confidence to Scale.** Chief Executive Officer Samantha Morshed' story of how new mentoring relationships and the opportunity to reflect led her to key decisions about scaling her social enterprise in Bangladesh.
- ◆ **Made in Liberia, Liberia - An Emerging Social Enterprise: From Lunch to Levi's.** Chief Executive Officer Chid Liberty's story of a tectonic shift in his apparel enterprise's access to mainstream markets.
- ◆ **Meyer Family Enterprises, United States - A Family Foundation: Leading for Social Impact.** Principal Bonny Meyer and Chief Executive Officer Patrick Gleeson's joint story of turning a desire to more strategically invest for social impact into a set of concrete practices, guided by a national expert in the field.
- ◆ **Sarona Asset Management Fund, Canada - A Social Impact Fund: Securing New Investors.** President Gerhard Pries' story of enlisting new capital for a new investment fund.
- ◆ **Shorebank, United States – Jan Piercy & ShoreBank: Momentum Out of Stillness.** Executive Vice President Jan Piercy's story of acquiring new accounts, while also recharging her own sense of purpose.

Our conversations suggest six key outcome domains (a larger sample of Delegates may have revealed more than six):

- ◆ **Relationships and Social Networks**
Relationship development is a common outcome of the Opportunity Collaboration. Delegates commented on the unusual depth and strength of new relationships that were formed there, and many were still actively in touch with fellow participants six months after the event, some on a weekly basis. Networking was used for many purposes by Delegates, including information-sharing, obtaining resources, mentoring, and peer support.
- ◆ **Coordination of Efforts By Donors and Investors**
Collective mobilization of disparate resources in support of common goals was a priority for many of the funders and investors at the



Opportunity Collaboration. Delegates who arrived at the event with that goal readily found like-minded partners and established new funding collaborations, such as the establishment of a new investment fund, or joint funding of an initiative.

- ◆ **Direct Donation or Investment to Nonprofits and Social Enterprises** The Opportunity Collaboration gives small and emerging enterprises access to investors actively looking for opportunities, and speeds up due diligence for social investors. While the event did not encourage “pitching,” it did provide a low-pressure forum for philanthropists and impact investors to meet nonprofit leaders and social entrepreneurs and learn about their projects. One philanthropist commented that the Opportunity Collaboration was the best environment he had experienced for performing first-round due diligence. The length and residential nature of the event allowed conversations to expand trust and confidence to emerge. Several donors and investors made new funding commitments at or shortly following the Collaboration.

- ◆ **Knowledge Transfer and Application** Delegates all had the opportunity to lead a conversation about their work, or a topic of passionate interest, and most Delegates took advantage of this opportunity. Information was exchanged in this way, but these conversations also enabled Delegates with common interests to first find each other. Once connected around common interest areas, Delegates spent time at meals and in subsequent informal discussions continuing to explore topics and share experiences and knowledge. In some cases, very specific knowledge and/or technology transfer occurred, and led to concrete outcomes for Delegates.

- ◆ **Research and Development** Not all of the outcomes from the first Opportunity Collaboration have yet occurred. Many Delegates we spoke with mentioned that plans were “in the works” for new projects that were sparked at the gathering. The structure and setting of the event encouraged innovative thinking, and six months after the event, brainstorming had evolved into funding proposals and due diligence, in some cases.



- ◆ **Personal Renewal, Reflection, and Growth**

The Opportunity Collaboration is structured with plenty of “down time,” and Delegates are encouraged to exercise, relax, and recharge in whatever way suits them, as a means of balancing their focused participation in the event’s formal program. For many Delegates, the chance to have time and space for personal reflection and self-care, outside the demands of daily life and work, led to important breakthroughs in thinking, or a sense of personal renewal and recharged energy to advance their mission-driven work.

What Aspects of The Opportunity Collaboration Promoted These Outcomes?

Delegates were asked to describe the elements of the Opportunity Collaboration that “worked” for them, and, in particular, that promoted the realization of tangible outcomes. The following features of the event were mentioned consistently:

- ◆ The length of the event provides sufficient time to see the same people multiple times, and deepen relationships.
- ◆ The location of the event at a closed campus means that every individual on site is a potential colleague.
- ◆ The informality of the event – for example, nametags have name only, not organizational affiliation – creates a relaxed, equalized environment.
- ◆ The morning colloquium sessions, while not universally valued, stood out as a powerful forum for many Delegates to get to know each other’s values and perspectives, rather than just their organizational messaging and agendas.
- ◆ The caliber of the attendees, particularly the fact that they were decision makers and leaders of their organizations, promoted conversations that were both creative and visioning, and also serious and action-oriented.

What Characteristics of the Delegates Promoted A Fruitful Experience?

Not all Delegates to the first Opportunity Collaboration found the event a “fit” for their expectations. Those Delegates who did experience tangible positive outcomes from the gathering shared the following self-described characteristics:



- ◆ An openness to outcomes, and no fixed, preconceived agenda; alternatively, a willingness to shift preconceptions, and find value in unexpected ideas and connections
- ◆ A sense of humility, and a willingness to leave “ego” and status at the door
- ◆ A willingness to engage with others, and to step outside of known networks
- ◆ An assertive and proactive approach to getting the most out of event
- ◆ Full participation in all aspects of the program, ranging from reading the advance materials, participating in the pre-meeting networking, attending the colloquium sessions and scheduled conversations, as well as taking advantage of opportunities for informal networking and relationship building.

This effort to articulate and document some of the tangible outcomes emerging from the inaugural Opportunity Collaboration event is a first step in tracking the ultimate social impact that might be traced back to the gathering. The study, though modest, is timely, and captures a kind of baseline condition – the moment a key relationship was formed, or important agreement was made – useful for tracking the origin, or “epicenter,” of change.

Moreover, the exploration of the fit between elements of the event and characteristics of successful participants provides a window into the transformative power of apparent subtleties – such as what information is presented on a nametag, or which Delegates are invited to attend – that are a carefully considered part of the Opportunity Collaboration, in other words, the event’s “special sauce.” Some aspects of the gathering will shift as it evolves over the years, but this study suggests that the features described above should remain constant.

Regardless of the changes in program, structure, or Delegate Roster, we encourage the Opportunity Collaboration to continue assessing its effects on Delegates, their organizations, and ultimately, on efforts to alleviate poverty worldwide. Building knowledge about the conditions that create authentic and powerful opportunities to collaborate, and the results of collaborations that form, is another vital contribution of the event to the social sector.

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