DISCUSSION GUIDE:

THEORY OF SOCIAL CHANGE

Purpose of this Discussion:
You can use this agenda and worksheet to examine the impact your organization can have when you incorporate social change goals into your program planning.

Hoped-For Outcomes:
- Understand the difference between a Logic Model (or Theory of Change) and a Theory of Social Change
- Map your work and its impact for use in future program planning
- Recognize the full range of assets you are working with

BACKGROUND

Many service agencies use some sort of Theory of Change or Logic Model to articulate their service provision goals. Both of these tools use a visual representation of work and outcomes in order to plan for impact and link it to daily work. The underlying purpose of these tools is to assess the "if-then" (causal) relationships between the elements of a program; if the resources are available for a program, then the activities can be implemented, if the activities are implemented successfully then certain outputs and outcomes can be expected. These models can be used for evaluation, but they are also great tools to use for program planning.

This discussion guide and exercise applies an adapted version of this familiar framework to your organization in order to help participants consider how service work differs when it incorporates social change goals. Both types of planning and impact are important. For organizations making a 5% shift towards incorporating more of a social change vision into service work and planning, the right-hand column of the worksheet that accompanies this discussion guide can be very useful in order to understand and expand the community impacts of the work.

DEFINITION OF ROOT CAUSE

Root causes are the underlying factors that create community problems, and make those problems likely to persist even though services may be in place to help individuals and families meet their immediate needs. The concept comes out of science and it refers to problems that keep occurring because we don't get to the "root" or real cause.

90-MINUTE AGENDA AND DISCUSSION QUESTIONS

Round of Introductions and Personal Reflection 10 min

Start with a round of introductions where people respond to the following question:

> When are you most aware (or confronted by) the community-level, structural and systemic barriers to your work?

Note: You may want to write down answers on a flipchart for everyone to see and remember.

Introduce the Exercise 5 min

Explain that the goal of this exercise is to help participants consider how service work differs when it incorporates social change goals. **Note that the goal is not to show that one approach is more important than the other but to determine how to balance the two**.

Give each person a copy of the attached worksheet. Write your organization's mission statement on a flipchart or whiteboard, and have the group fill it in on their worksheets. Explain that the mission statement of most service agencies reflects the agency's Theory of Change – its plan for how to go about addressing a community need or problem. Let the group know that you will begin this process by first identifying your organization's Theory of Change based on your mission.

Theory of Change 20 min

Break into small groups of about 3 or 4 people per group and ask them to discuss (and write-down in the Theory of Change column on their worksheets) responses to the following questions:

Assessment of Individual Needs: What assumptions does our mission make about the population we serve, the problems they face, and how that problem should be addressed?

Service Goals and Activities: What are the service goals outlined in our mission? What activities do we engage in to meet those goals?

Resources Needed: What resources do we need in order to meet these service goals? *(i.e. contracts, billable hours, fee for service work, specialized staff skills, etc)*

Service Provision Metrics: How will we know if we've met our service goals? What are the indicators of success and how will we measure them?

Theory of Social Change 20 min

After 20 minutes, have the group shift their focus to thinking about what the work of the organization would look like if it was also focused on addressing the root causes of the problems your mission addresses.

Ask participants in their groups to discuss (and write-down in the "Theory of Social Change" column on their worksheets) responses to the following questions:

Root Causes of Community Needs: What are some root causes of the conditions that our mission addresses? (*See definition in the box – you may want to discuss this at the beginning or post this definition in the room*)

Social Change Goals and Strategies: What goals to we want to achieve in order to address community needs? How will we achieve those goals?

Resource Opportunities: What are examples of resources accessible to us when we focus on community change goals? *(i.e. community relationships and coalitions, new partnerships, community leadership, staff development, etc)*

Community Impacts: How will we know if we've met our goals? How would the community look different if these goals were achieved?

Group Discussion 25 min

Have one or two groups present their comparison to the larger group

As they present have each presenter highlight:

Any 'A-ha!' moments from the group discussion

Where the group struggled

After each presentation, have members of the wider group offer feedback, observations and comparisons to their own findings during the exercise

Have the group discuss:

The differences in the approaches and what they mean

The pros and cons of the two approaches

Any common themes or recommendations they would make about incorporating social change work into social services

Closing and Evaluation 10 min

Ask people to identify one thing they liked and one thing they would change about the conversation.

Close the discussion and thank people for their participation.

Theory of Social Change Worksheet

MISSION STATEMENT:

Theory of Change (Logic Model)	Theory of Social Change
Assessment of individual needs:	**Root causes of community needs:**
Service goals and activities: *(to address Individual Needs listed above)*	**Social change goals and strategies:** *(to address Community Needs listed above)*
Resources needed: *(i.e. contracts, billable hours, specialized staff skills)*	**Resource Opportunities:** *(i.e. partnerships, staff development, community leadership)*
Service provision metrics:	**Community Impacts:**

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