

TRAINING BROCHURE 2020



NEXT GENERATION
expertise • impact • return

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Over the past 20 years, Next Generation Consultants have trained more than 5 000 professionals in the social investment, development and sustainability sectors. Previous training topics and courses included sustainability and integrated reporting, stakeholder and human rights management, social development and social innovation, social investment, as well as monitoring, evaluation and impact assessments.

Our training and development solutions are designed to help organisations and individuals improve their knowledge, personal competence, and skills as these are core enablers of a sustainable business and competitive advantage.



OVERVIEW OF TRAINING

ARE YOU AN IMPACT INVESTOR?

Nearly three decades since the introduction of the earliest Socially Responsible funds, the impact investment industry has grown enormously. Estimates indicate that, in 2019, the market has increased to over US\$500 billion in assets under management. Yet, as it grows, the industry continues to grapple with the challenge of **impact management, measurement and reporting**. Investors are progressively seeking information about the impact of their investments, which underpins the fundamental question - *how do professionals accurately measure the impact of an impact investment?*

ARE YOU A SOCIAL INVESTOR?

The purpose of impact measurement is to identify ways to increase the benefits and effectiveness of grants, donations and social investments to the recipients and beneficiaries. Simple as it seems, this principle is often preached but not practiced. If it's true that only what gets measured gets managed, unfortunately it's also true that too many social sector funders spend time and resources collecting data that is not then used to improve the lives of the most important and intended stakeholder groups. And although numerous research studies show that the majority of social sector funders report measuring outcomes, there is no indication of how many of them adapt their activities based on the information collected through the impact measurement system. *In addition, **impact measurement** systems are often set up to comply with funders' requirements, and not following a clear strategy that starts with clarifying investment intent, objectives and stakeholders.*



SOCIAL AND IMPACT INVESTORS AGREE: TO MEASURE IMPACT, YOU MUST MANAGE FOR IMPACT:

- Do you need to set up an **impact measurement system** for your organization, but don't know where to start?
- Do you have an **impact measurement framework**, but want to better use and communicate lessons learnt?
- Do you need to prepare an **impact report** to a range of stakeholders, but are not confident in the results of your impact outcomes?
- Do you need to report to investors and funders about the impact brought about by your interventions, programmes and investments?



IF YOU ARE INTERESTED IN:

- Understanding and measuring the impact your investments and development programmes generate
- Improving your existing impact measurement processes and systems
- Moving beyond monitoring and evaluation to impact assessment
- Learning how to use the data you collect to make better investment and development decisions
- Maximising your investments and resources to become more effective in your investment and development practices
- Learning more about how to set up or fine-tune your impact objectives/intent and collect the right data to improve your work

AND YOU WANT TO DO IT BY:

- Learning through real-life case studies and group work
- Discussing openly with experienced practitioners
- Sharing challenges and learnings with your peers

...then **the Impact Measurement and Management Masterclass** is the course for you! This masterclass blends theoretical study with practical case studies to help you understand how **impact management and measurement** can work effectively in real-world contexts.



THE IMPACT MEASUREMENT AND MANAGEMENT MASTERCLASS

TRAINING AND CAPACITY BUILDING ARE AT THE HEART OF NEXT GENERATION'S WORK.

Our Impact Measurement and Management Masterclass is aimed at helping social and impact investors to:

- Develop their social and impact investment strategies
- Develop high impact investment and development portfolios and programmes
- Develop performance management processes and systems
- Align their impact management and measurement practices to international guidelines, standards, frameworks and principles
- Identify indicators to measure the change brought about by their investments and interventions

This brand-new masterclass is aimed at social and impact investors who want to:

1. Develop impact measurement strategies and implementation plans for their organisations through a theory of practice or investment thesis
2. Design high impact programmes, portfolios, interventions and investments that are effective, efficient and sustainable
3. Develop supportive impact management infrastructure to deliver effective investment programmes through theories of change and logic model frameworks
4. Measure the impact and return on investment of their interventions and investments
5. Report on their impact and return on investment to their stakeholders
6. Achieve buy-in from investors, senior management and boards enabling the integration of impact measurement and management practices across the organisation

HOW IS THE MASTERCLASS STRUCTURED?

Structured over three days, the masterclass focuses on impact management and measurement from three perspectives:

	DAY 1 Designing and planning for impact	DAY 2 Managing for impact	DAY 3 Measuring and reporting impact
SESSION 1: 08:00 – 09:00	Introduction and overview, trends and best practices in impact management and measurement Introduction of case study	Recap of Day 1—discussion about challenges, opportunities and risks, case studies, existing approaches to impact management and measurement Review of case study	Recap of Day 2—discussion of lessons learnt, and new practices identified Conclusion of case study
SESSION 2: 09:00 – 10:00	What is impact? Who defines impact? What counts as impact? Who is impacted and in what way?	Comparing research, monitoring, evaluation and impact assessment Different research approaches, objectives, outcomes	An end-to-end impact management and measurement process: Stakeholder engagement, baselines, indicators, impact verification and analysis, determining impact vs return on investment
REFRESHMENT BREAK - 10:00 – 10:30			
SESSION 3: 10:30 – 11:30	Designing impact strategies, impact mandates and intent	Developing performance management systems, processes and frameworks	Standards of evidence, burden of proof, accountability, transparency, ethics and values
SESSION 4: 11:30 – 12:30	Designing impact themes and investment portfolios Investment and development objectives, targets and outcomes	Conducting and commissioning impact assessments Impact questions and envisaged outcomes	Data collection and impact insights, recommendations, tools, data management and technology for measurement
REFRESHMENT BREAK - 12:30 – 13:30			
SESSION 5: 13:30 – 14:30	Designing logic model frameworks and determining investment and development impact, risk, return	International frameworks, guidelines, principles, standards	Impact reporting, reflection and learning including negative impact, trade off/drop off, dead weight, attribution and contribution
REFRESHMENT BREAK - 14:30 – 15:00			
SESSION 6: 15:00 – 16:00	Guest speaker: Social Investor	Guest speaker: Impact Investor	Participant review and feedback

ON COMPLETION OF THIS MASTERCLASS, YOU'LL HAVE:

- An appreciation of how impact management and measurement can support learning and accountability processes
- An understanding of the purpose of impact management and measurement, the differences between different performance management approaches and how they fit into broader programme and investment management cycles
- A familiarity with the core terms and concepts; guidelines, standards, frameworks, and principles
- An understanding of programme theories, including theories of change, theories of practice, logic model frameworks, and how they are used
- The ability to formulate and use basic performance indicators for reporting
- An understanding of what impact management and measurement is and how it should be undertaken

WHO SHOULD ATTEND?

This 3-day course is intended for practitioners and professionals of different profiles who want to strengthen their capacity in terms of the following: impact evaluation, impact measurement and management, social impact measurement, impact reporting, monitoring and evaluation, as well as practitioners who are already responsible for social impact measurement for a non-profit organisation such as an NGO, a foundation or development agency, social purpose organisations and social enterprises or investors who want to accurately measure the impact of their impact investments.

HOW WILL YOU BENEFIT?

- Gain a better understanding of what impact management and measurement means for you and your organization
- Learn through action-based learning and practical exercises and methods, engagement, interaction with leaders in their field
- Identify some of the most important things for you to measure and the options to measure them
- Use impact measurement to make decisions, secure funding, be accountable, keep on track and advocate for your organization or cause
- Understand the difference between various impact and evaluation models, evaluation and research approaches and
- Develop impact messages for different audiences using the most relevant tools and communication channels

WHO'S RUNNING THE SHOW?



Reana Rossouw is the owner of Next Generation and creator of the Investment Impact Index™. She is an expert at training who has presented masterclasses on corporate social responsibility, sustainability and integrated reporting, stakeholder and human rights management as well as impact management and measurement across Africa.

She has been extensively published and her handbooks on grant-making, monitoring, evaluation and impact assessment are regarded as industry standards for development and investment practitioners.

She has worked with some of Africa's largest investors across industry sectors to develop social innovation, shared value and socio-economic investment and development strategies. Her work in impact management and measurement, developed over the last ten years by conducting impact assessments on over 700 programmes, has given her extensive insight into existing monitoring, evaluation and impact assessment practice.

Reana is regularly called upon by investors to develop performance management frameworks, provide training to internal investment and development teams and to provide insight into what works and how to increase impact and return on investment.

For videos and feedback on previous master classes, as well as additional information and resources please visit our website at www.nextgeneration.co.za.

PRACTICAL INFORMATION

FEES

The cost of the Masterclass is R12 000 per person.

To present these master classes outside of South Africa, special arrangements can be made for individual groups and payment can be arranged in foreign currencies.

Fees include training, refreshments and lunch and a certificate of attendance. Participants are responsible for transport, accommodation and other meals.

Fees are invoiced in local currencies and value added tax will be added.

DATES

The Impact Management and Measurement Masterclasses will be presented as follows:

MARCH 2020:

9 – 11 MARCH: JOHANNESBURG, SOUTH AFRICA

16 – 18 MARCH: CAPE TOWN SOUTH AFRICA

JUNE 2020:

2 – 4 JUNE JOHANNESBURG: SOUTH AFRICA

Please note that this training is limited to a total of 25 participants and will only proceed with a minimum of 10 participants. Training venues will be shared on confirmation of booking.

The dates for the 2020 Masterclasses are for public courses, but inhouse, customised and onsite courses can be arranged as well.



BOOKING FORM

PARTICIPANT INFORMATION	
Title, name and surname	
Telephone number	
Email address	
Disability requirements	
Special dietary requirements	

ORGANISATIONAL INFORMATION	
Company name	
Company address	
VAT number	
Purchase order number	

EVENT INFORMATION	
Date and city the participant is registering for	

REGISTRATION

- Please complete the electronic form and submit it online.
- Upon confirming the availability of places available in the course, we will confirm your registration by email.
- Following this confirmation, payment for the course is necessary within one week to confirm your reservation.

CANCELLATION POLICY

- If the registered participant cannot attend, a replacement may be sent provided written notice is submitted 7 days prior to the event.
- If cancellation should be necessary:
 - More than six weeks before the course start date, an administrative fee of R500 will be charged.
 - Between six weeks and four weeks before the course start date, 50% of the course fee is due as an administrative fee. The remaining 50% can be used for the booking of another course date or can be reimbursed.
 - Less than four weeks before the course start date, 100% of the course fee is payable.
- Course dates are subject to change. If a course is cancelled, Next Generation will refund the course fee in full. Next Generation will not be held responsible for travel, visa, accommodation or other expenses incurred by the participant.