



## TOOL | COLLECTIVE IMPACT INITIATIVE BUDGETING TOOL

The backbone infrastructure of a Collective Impact effort is focused on six core roles. These are:

- Guide vision & strategy
- Support aligned activities
- Established shared measurements
- Build public will
- Advance policy
- Mobilize funding

An in-depth study by FSG of successful backbones, revealed that: their value is unmistakable; they share strengths in guiding vision and strategy and supporting aligned activities; they shift focus over time; they need ongoing assistance with data; they build public will, and Backbones help to advance policy.

### DESCRIPTION

Collective Impact initiatives benefit from generating their budget by engaging multiple funding streams.

There is a considerable range in the operating budgets of them as well, and the budget requirements of any Collective Impact effort tends to evolve over time as the work of the initiative expands and grows.

The two examples on the next page provide a sense of the range in budgets of Collective Impact efforts and how each evolved over time.

### HOW-TO

**Step 1.** Modify the tool below to add in the resources/expenses that best represents your initiative.

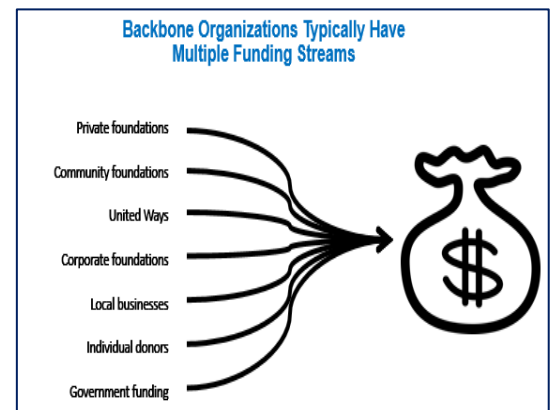
**Step 2.** Individually, or as a group, complete the budget template. (15min)

### DEBRIEF

Debrief questions can include:

- How can we best incorporate the in-kind resources and/or partner contributions to reflect the true cost – and contributions – secured for our Collective Impact effort?

Source: [www.FSG.org](http://www.FSG.org)



## Example Collective Impact Budgets

### A Backbone's Scope and Budget May Grow Over Time, Primarily Reflecting Staff Additions And Available Resources

	<u>Year 1</u>	<u>Year 2*</u>	<u>Year 3 On*</u>
<b>Potential Staff:</b>	<ol style="list-style-type: none"> <li>Executive Director</li> <li>Data Manager</li> <li>Facilitator</li> </ol>	<ol style="list-style-type: none"> <li>Executive Director</li> <li>Data Manager</li> <li>Facilitator</li> <li>Project Coordinator</li> </ol>	<ol style="list-style-type: none"> <li>Executive Director</li> <li>Data Manager</li> <li>Facilitator</li> <li>Project Coordinator</li> <li>Communications Manager</li> <li>Office Manager / Assistant</li> </ol>
<b>Typical Responsibilities:</b>	<ul style="list-style-type: none"> <li>Guide vision and strategy</li> <li>Liaise with Working Group and Strategy Groups</li> <li>Build public will / awareness</li> <li>Begin implementation of strategies and shared measures</li> </ul>	<ul style="list-style-type: none"> <li>Guide vision and strategy</li> <li>Support and coordinate aligned activities</li> <li>Deepen shared measurement practices</li> <li>Build public will / awareness</li> </ul>	<ul style="list-style-type: none"> <li>Expand priority strategies and partners based on data</li> <li>Build public will / awareness</li> <li>Communicate progress</li> <li>Advance policy</li> <li>Mobilize funding</li> </ul>
<b>Estimated Budget:</b>	\$3-400K	\$5-600K	\$7-900K

\* The resources required by the Backbone vary with the needs of the initiatives. In some instances budgets have remained flat or declined; in others, FTEs and budgets have grown with the changing requirements of the role

Source: FSG case work and analysis

### Case Example: Hamilton Roundtable for Poverty Reduction

	<u>Year 1</u>	<u>Year 2*</u>	<u>Year 3 On*</u>
<b>Potential Staff:</b>	<ol style="list-style-type: none"> <li>Director</li> <li>Researcher</li> <li>Administrative Staff</li> <li>Tamarack Coach</li> </ol>	<ol style="list-style-type: none"> <li>Director</li> <li>Manager, Community Engagement</li> <li>Administrative Staff</li> <li>Tamarack Coach</li> <li>Tamarack Evaluator</li> </ol>	<ol style="list-style-type: none"> <li>Director</li> <li>Manager, Community Engagement</li> <li>Administrative Staff</li> <li>Project Coordinator</li> <li>Tamarack Coach</li> <li>Tamarack Evaluator</li> <li>Contract Staff</li> </ol>
<b>Typical Responsibilities:</b>	<ul style="list-style-type: none"> <li>Guide vision and strategy</li> <li>Liaise with Working Group and Strategy Groups</li> <li>Build public will / awareness</li> <li>Researches issue and develops poverty matrix</li> </ul>	<ul style="list-style-type: none"> <li>Guide vision and strategy</li> <li>Support and coordinate aligned activities</li> <li>Develops shared measurement practices</li> <li>Build public will / awareness</li> </ul>	<ul style="list-style-type: none"> <li>Expand priority strategies and partners based on data</li> <li>Build public will / awareness</li> <li>Communicate progress</li> <li>Advance policy</li> <li>Mobilize funding</li> <li>Renewal after 5 years</li> </ul>
<b>Estimated Budget:</b>	\$1-250K	\$3 - 500K	\$3 - 500K

\*Tamarack provided coaches for each of the communities to support their development. A common evaluation framework was also developed by Tamarack and an external evaluator coordinated the data collection, review and learning process.

Source: FSG case work and analysis

## Collective Impact Initiative Budget Tool

Modify this tool so that the initiatives expenses are reflected.

Expense Category	Budget Range (\$)		CI Initiative Budget	Description
	Low	High		
<b>Salaries</b>				1 FTE Executive Director
				1 FTE Facilitator/Coordinator
				1 FTE Data/Operations Manager
				0.5-1 FTE Admin. Support
<b>Benefits</b>				At 20% of salaries
<b>Professional Fees</b>				Consultants, R&E, Recruiting, Data Collection
<b>Travel and Meetings</b>				Workshops, events, retreat
<b>Community Engagement</b>				Space rental, youth stipends
<b>Communications</b>				Reports, materials design, paid media
<b>Technology</b>				In kind hardware, software, IT
<b>Office</b>				In kind/paid rent, utilities, supplies
<b>Other</b>				Staff training, miscellaneous
<b>Total Expenses</b>				Covered by grants and fees