

causeway

Pilot Guide

**Quickly test and
strengthen your cause.**

OVERVIEW

Over the past decade, Causeway has welcomed over 1000 ideas from everyday people wanting to take action in our city and make it a better place. We hear time and time again, “I have an idea, but I am not sure how to get started.” This guide will help you take your idea, and turn it into something that is ready to be tested in just a couple of short steps.

Why Pilot?

When you are passionate about your cause, it can be very tempting to jump all in and go for the big vision right away. But pilots help us learn more about our project before we invest a ton of time and money into something. Let’s say, for example, your dream is to start a nonprofit retreat center for single mothers. While the dream is costly (purchasing land, a facility, staff, materials), a pilot can help

you determine if what you're offering is going to be both impactful and desired by your clientele, for a fraction of the cost. A pilot for this cause could be a two-hour mini-retreat brunch for single mothers. At the brunch, test out some of the activities you would plan to offer at the retreat center. Host a couple of smaller pop-up versions of your mini-retreats to test the different programming options. This gives you the opportunity to work out all the kinks and pick the best option.

It may feel counterintuitive, but the best way to build your cause is to start before you are ready. Your plan will never be perfect. The only way to know whether or not your idea will work is to get it out there and test it. The people you want to help will be able to give you feedback and insight as you go, helping you build a stronger solution along the way. So if you have an idea and you are not sure exactly what it is going to take, whether it will work, or how you will iron out all the details, then this guide is for you.

How to Use This Guide

Skim through the guide to get an idea of the steps you'll need to take. Then, starting with the first section, work through the activities provided. Each section in this guide is designed to take about a week to complete. Once you complete a section, then move on to the next one. Pilots are messy, and although we've attempted to boil down the activities to what we see as the essential steps for hosting a great pilot, don't let any one activity hold you up too much. If you don't know the answer to something, keep moving forward, and it will reveal itself in time.

FRAME THE PROBLEM

Start With Research

Begin with a deep dive into the problem you're trying to solve. Oftentimes we see cause leaders who are interested in solving a problem because it's something they have experienced first-hand. This is ideal. If the issue you are working on is not something you've experienced personally, then we would suggest finding a partner who has. There is no substitute for lived experience. But even if you are a cause leader with first-hand experience, that does not mean that you get to skip the research phase. You still need to learn about that issue from different perspectives. Talk to other people who have experienced it. Look into some hard data and facts on the topic.

Talk to nonprofit leaders in your area who are trying to address that issue — what problems are they running into?

The quickest and easiest way to move into action is to hop online and call up some experts in your area. But keep in mind your research needs to take place offline as well. Get to know the people at the center of these issues to understand the complexities involved. Your goal is to learn as much as you can about the problem.

Get a jumpstart with our Research 101 Activity. Spend an entire week digging into these questions and learn as much as you can about the problem you want to solve.

Interview and Test Assumptions

When starting to work on a social cause, we all make assumptions. As you talk to people about your plans and test your idea, you will inevitably learn something new. Your theories may turn out to be right, they may turn out to be false, or you may discover a surprising new angle to the issue. You need to test the assumptions you've made about your project already. Use the Assumptions Activity to identify what preconceptions you have about your cause that will need to be either challenged or verified by the people experiencing this problem first-hand. When you know what assumptions you have, test them by using our Interview Guide to make a plan, and talk with potential clients.

START SMALL

Big Dreams and Small Beginnings

We have already talked about how piloting is such a crucial step in the process of building your cause. The dream version of your idea is going to take a lot of investment (likely of both time and money) and won't happen overnight. Developing a proof-of-concept for your project will prevent you from over-investing in a solution that either doesn't work or isn't wanted.

That does not mean that dreaming big is any less important! In fact, you cannot build your pilot without first casting the vision for your cause. The dream is what gives you direction, focus, and lets you know what you will need to be testing in your pilot.

Use the Cover Story Activity to cast the vision and start dreaming big.

We also find this can help you prioritize what you must do now and what can wait. Once your vision begins to come into focus, we can start creating your pilot program.

Bring Your Cause Into Focus

Complete the Five W'S Activity to help you get clarity on exactly what your solution will look like and begin bringing everything into focus. If there's something you don't know yet or are unsure about, just put something in there as a placeholder. You can always come back to it later, but try to challenge yourself to be decisive and start making some real choices for your cause.

Build Your Pilot

If you could start working toward solving the problem this week, what would you do? For your pilot project, you need to think about what is the smallest, quickest version of your idea that allows you to start serving the people affected by this issue and getting essential feedback from them as soon as possible.

Next, using the work you just completed in the visioning activities above as your guide, choose a smaller version of your idea that you will pilot. Use our Pilot Planning Activity to help you build a plan and get ready to bring your idea to real people.

SHARE YOUR CAUSE

With the details of your pilot ironed out, it is time to start sharing your idea and promoting your pilot. We know this can be the scary part for a lot of people, but until you start talking about your vision, you will never know whether or not your solution is hitting the mark. Follow the steps below to begin crafting your mission and your message, and test the plan you made for your pilot.

Messaging

Mission and Vision

Start with your Mission and Vision. The goal here is to get something on paper. Remember, we are in the pilot phase. It does not need to be perfect—in fact, it will definitely not be perfect, and that's the point. Use our Ten Minute Mission and Vision activity to get started. You can always change it later! If you have writer's block, set a timer and just challenge yourself to get something on the paper.

Elevator Pitch

You walk in an elevator and run into an acquaintance. They ask you what you're working on. Can you succinctly tell them about your cause before they get to their stop? An elevator pitch is a brief description of your cause that can be said comfortably and confidently in less than 60 seconds. Use the Craft Your Elevator Pitch Activity to help you convey your idea clearly and effectively.

Branding and Outreach

Make a plan to communicate with your audience. Creating a plan does not mean that you need to hire a professional PR firm. You only need to have an idea of when and where you are going to share the information for your pilot so that people show up! Especially if you are trying to reach a particular demographic, you need to make sure that you are promoting the event in places where that audience will hear about it.

Outreach Strategy

The ways that you will promote your pilot depends a lot on the nature of what you are doing. Maybe you only need 10 people, or maybe you need 200 people. No matter what, it is important to try to have some people there that you do not already know. For a pilot, your outreach can stay pretty grassroots. Ask friends to recommend people who fit your target audience, put out a call on social media, go network at local community events, reach out to organizations who work with your target audience, and put up flyers in places that you know your audience goes. We've learned, nothing goes farther than personal emails. So take a couple of hours to sit down and write a few heartfelt emails to people in your network asking them to point you towards people who might be a good fit for your pilot.

Branding

It's tempting to want to have a solid, professional logo and brand nailed down before you start your pilot, but this is a trap. Good branding takes time, money, and requires a deep understanding of what exactly your cause does. The pilot exists to help you figure this out, so don't jump the gun on investing in a professional brand. But with that said, good design can go a long way towards attracting attention for your cause. There are so many online tools with design templates where you can choose images that represent the energy of your cause, without committing to a brand that should last you a lifetime. Create custom graphics on Canva, send e-invites

with Paperless Post, or create a quick temporary logo with Fiverr to support your pilot.

If your pilot includes an event for more than a handful of people, it's important to have a place online where they can easily access information about the event. Similar to the branding trap, it might be tempting to build a fancy custom website for your pilot. If you or someone on your team has experience in web design and can do this quickly and easily, go for it! But if it is something that is going to take a lot of time and money, we suggest a more pilot-sized solution like posting an Eventbrite, or using a landing page template from Squarespace or Mailchimp. Even a simple Facebook event can go a long way in the early stages.

Social Media

During the pilot phase, social media is your best friend. It is a free way to access lots of people. You can create a page for your cause with one photo and a brief description of your vision. You can create a Facebook event for your pilot and ask friends to share it. If you have even \$20 to spend on advertising, Facebook allows you to boost your event, and choose a really specific target audience that you would like to reach.

LAUNCH YOUR PILOT

It may not feel like it, but you are ready. It is time to get that pilot off the ground and start impacting the community of people you want to help. Follow the steps below to implement your pilot.

Run of Show

It's good practice before a pilot to do a quick run through and make sure all your bases are covered. This will help you feel confident when you host your event. We call this a Run of Show for larger events, or it could be as simple as putting together an agenda. Basically, it's a play by play for how the pilot will roll out and lets everyone on your team know what to expect. Whether you've planned an event, an online course, or a lunch, this will help you think through the timing of your event, materials needed, and the participant's experience.

Metrics and Impact

You've found your cause, planned your solution, and implemented your program. But how do you know if it worked? Measuring Impact

is one of the most overlooked tasks when building a social cause. The reason for this is easy to understand: Social entrepreneurs can be overwhelmed with immediate needs, and much less with preparing for life after the solution. But consider the benefits: if you don't take the time to define what success looks like, how do you know when you've achieved it?

Decide ahead of time what you are going to measure. There is no point in running a pilot if you don't plan to measure the program's impact and record the feedback you get. A pilot is for testing out pieces of your cause, and you need to know what worked, what didn't, and ways to make it better next time. Use our Impact Measurement Toolkit to create a survey for your pilot and test out your theories about the impact your cause will have. Make sure to record and evaluate all the feedback so that you can adapt your pilot to the things you learn. Make any final changes to your pilot project and get it ready to launch.

Funding the Pilot

A pilot project is meant to be low-lift and low-investment. You want to try to pull this off for as close to free as possible. If it gets too expensive, it's not a true pilot, and you should go back to the drawing board to reevaluate how you can scale it back a notch. Reach out to people in your network or companies that might be interested in also solving this problem and see if they'd be willing to donate in-kind in exchange for some promotion. Sometimes small grants are available for opportunities like this. The Pilot Planning Activity you completed earlier is a great tool when it comes to applying for funding. You can also use our Funding Toolkit for more resources on writing grants. Check out the Local's Guide for some options in Chattanooga.

LAUNCH YOUR PILOT

Congrats on launching your pilot! Maybe it was a huge success — or maybe it was an epic disaster — but either way, it's okay. Any pilot is a successful pilot. The most important thing is that you learned a ton, and now you can use that information to improve your cause. Sometimes it takes multiple pilots and iterations to get to the right solution. Stay the course and keep evaluating as you go.

Evaluate the Pilot

Okay, so how did it really go? Use the surveys you collected at the

pilot and record the results into a spreadsheet. If you used an online platform like TypeForm or Survey Monkey, download a CSV file to calculate your responses. Once you have your results, make the data presentable and readable. You can use Excel to make simple graphs that give you a fun and easy way to share the impact with your team. If people left comments, read through the comments as a team, and look for patterns. Did multiple people suggest or complain about the same thing? That's a good indication that you need to adjust something there. After reviewing the data collected, brainstorm as a team what you would do again and what you would like to change.

Next Steps

Where do you go from here? Depending on how the pilot went, it might be back to the drawing board, so that you can continue testing out your cause. That's okay, and even if you feel like the pilot went well, you can continue to run the pilot as is to build up your proof-of-concept and impact data. If you feel like you are ready to scale, replicate, or take your cause to the next level, then check out our Sustainability Guide.