The Aspen Institute First Mover Fellowship Program:
Assessing the Impact

Introduction

In 2009 the Aspen Institute’s Business and Society Program launched a fellowship Program for First Movers: exceptional innovators in business who are creating new products, services and management practices that achieve greater profitability and positive social and environmental impacts. The goals of the program are to strengthen the capacity of these business men and women to innovate and lead change in their companies and to build a cohort of leaders who will, over time, collectively change how business is done and how business success is measured.

The fellowship program, now entering its fourth year, includes three four-day seminars and extensive work on a “next stage innovation” project selected by each Fellow. By April, 2012, fifty fellows from forty-two companies and seven countries will have graduated from the program.

As the program began in 2009, the Business and Society Program hired an experienced, independent evaluator, Dr. Shari Cohen, President of Intersections Resources, to track progress toward achieving program objectives. Since then, Dr. Cohen has worked closely with the Fellowship’s design team to assess the program’s impact in three ways: the personal impact on each Fellow; the impact on the Fellow’s organization; the progress on project implementation. What follows is a summary of her research report from the first two years of the program.

The evaluation is based on phone interviews with Fellows and their “thought partners” (colleagues within their companies), online surveys, written materials submitted by the Fellows, and direct observation at the fellowship seminars.

Evaluation Summary

1. Fellows report transformative impact in their level of confidence, ability to advance an innovation in their companies, and in their sense of motivation and purpose in their work. 100% found the program valuable. Approximately two-thirds of the Fellows in each of the first two classes talk about their experience in terms of a before and after and use terms like career changing or career accelerating to describe the impact.

2. Companies see organizational benefits. Corporate representatives, who serve as thought partners to Fellows, report marked growth of Fellows as leaders, as evidenced by promotions, increased credibility and authority. Additionally, they report advances in projects of value to the company and benefits derived from learning from peers in other companies about innovating at the intersection of financial and social or environmental value. Many companies also express support for the program by nominating additional candidates to participate in First Movers.

3. Inspired and instructed by program features such as its focus on innovation and leadership skills, Fellows have made progress on implementing their next stage innovation projects for their organizations. During the program they move projects from early conceptualization to implementation, or through implementation. Or they bring existing initiatives to scale. Many
fellows (almost two-thirds) say that without their participation either they would never have developed their innovation projects in the first place or that they would not have advanced the projects, or advanced more slowly.

Personal Impacts of the First Movers Fellowship

A substantial portion of the Fellows talk about their experience in the fellowship as marking a turning point in their careers or in their sense of their own potential as leaders and change makers in their companies.

The most common impact cited is broader confidence that comes from the combination of the toolkit the program teaches, the caliber of the group of peers they meet, and the imprimatur of the Aspen Institute. And the confidence lasts beyond the end of the program. Almost a year after completing the program, Chris McKnett from State Street reports that he continues to experience “the confidence and assurance that the experience provides and the value of the credentials.”

A unique piece of this program is its emphasis on helping Fellows connect with the passion and purpose that inspires their work. According to Anupam Bhargava, who recently became CEO of Clearwater Systems, “I could not have mapped this path before the fellowship. But allowing myself to pursue professional growth based on my values has helped me find it. Aspen was a big part in getting me here.”

Also significant are the tools the program introduces to fellows and that fellows are now able to deploy. As some put it, they took away a “framework for innovation” they can continue to apply. Alicia Ledlie of Walmart notes, “There has been a shift in my thinking to appreciating there is a rhythm to innovation - a bigger picture - and my current project is just one iteration.” And Antonio Ballabriga of BBVA reports, “I now have a story of how I innovate—a framework I can use for any new idea in front of me.”

Two areas were particularly powerful for Fellows: 1) reframing problems to make them more successful or innovative and 2) using story-telling as a tool to enhance their ability to influence others to support their innovative ideas.

Suzanne Ackerman-Berman from Pick n Pay surmises that “the biggest change for me was how I solve problems; my ability to reframe issues and challenges and to help others do the same made me more effective in my company and how I can guide other people.” Many Fellows talked about the importance of learning to influence through telling stories rather than presenting dry data, and navigating both formal and informal avenues in their companies. As Ajay Badhwar at Dow notes, “Just having a good idea for change is not enough. Coming into the program, I described problems through data and market dynamics. I now rely more on compelling stories to present problems and solutions and get buy-in from senior leadership.”

“The fact that there are other First Movers out there is a great motivator. It gives a lot of energy to know that you’re part of something really exciting. That’s been very important to me.”

- Britta Rendlen, Swiss Re; 2010 Fellow
Organizational Impacts of the First Movers Fellowship

“A big impact for me was the inspiration from the other fellows . . . . I was also able to expand my sense of what is possible from hearing other fellows’ examples.”
Joanna Hafenmayer, Microsoft Switzerland; 2010 Fellow

Organizations are powerful beneficiaries of the First Movers program. Their participating employees grow as leaders. Some company representatives report step changes in the operational effectiveness of the Fellows. Most of the projects that Fellows initiate are seen as contributing significant value to the sponsoring organization. In addition, the knowledge that fellows acquire is typically brought back and spread internally, to their own teams and beyond.

Colleagues who serve as thought partners to Fellows during their fellowship year said in interviews that they saw growth in Fellows’ ability to influence others within the organization as one of the key values of the program. As one noted about the Fellow he worked with, “She is great with data, but her meetings would be sub-optimized. Now she really knows how to leverage those. So her value to the company, whatever project she gets assigned to, the chances of it succeeding are much greater and at a higher level.” Another reported, “Aspen helped [the Fellow] learn about navigating in as complex an environment as ours; it changed her worldview.”

Thought partners also confirm that as a result of the program Fellows exhibit greater confidence and reach higher. One said the Fellow he worked with “added confidence and a point of view to go forward and lead internal projects . . . .” Another said that “rather than doing something more tactical, [the Fellow] realized he could focus on something more strategic and could make an impact on something as big as how the firm thinks of itself . . . .”

In addition to leadership development, and project progress, companies also say that they see a clear return on investment if the fellow brings back the learning to a broader group within the company, either through sharing specific tools with their teams, or engaging others in their projects.

Impacts of the First Mover Fellowship on Next Stage Innovation Projects

Participation in the program enabled fellows to advance Next Stage Innovation Projects from conceptualization to implementation; to set up pilots to test ambitious projects, or to scale projects they had already begun to implement. Others were able to take risks they would otherwise not have taken in order to put into play new initiatives.

Assil Omar, Agility, believes “the prototyping concept was what got me moving on my project.” And Erin Fitzgerald, Dairy Management Inc., reports project advances that stemmed from her learning about using pilots and prototyping to enhance innovation capacity: “Calling my project a pilot –rather than trying to go for the whole huge and more ambitious goal - led directly to signing a Memorandum Of Understanding with a major government agency to help begin to achieve 25% reduction in emissions across the value chain by the year 2020.”

Britta Rendlen at Swiss Re applied the lessons of the fellowship to design a new project to work with others in the re-insurance industry to begin to influence clients to implement sustainability practices, not just as risk reduction but also as brand enhancement.
Kevin Thompson at IBM credits his First Movers experience with his success at scaling the Corporate Service Corps, an internal leadership program that sends employees to developing countries as advisors. He specifically cited his enhanced ability to navigate the relationships with key stakeholders with a different level of sophistication.

Fellows said the program also enabled them to think bigger about more tactical projects. For example, Ajay Badhwar at Dow moved from a discrete technical project on reducing CO2 emissions to advancing the vision within Dow that it stands to play a major role in solving climate change.

Finally, the network of Fellows itself has enormous value for fellows personally, and for companies. Fellows get tremendous support and inspiration from each other. In some instances, Fellows find points of synergy in their projects that result in value-added results for both companies.

**Success factors**

What makes the program successful? One of the top factors cited by fellows is the quality of the group that Aspen recruits each year. Fellows are informed and inspired by others.

Another factor is the unique program design, which brings together leadership, innovation, and advancing a company’s capacity to integrate social and environmental value into its core strategy. The fact that Aspen does not shy away from deep personal exploration and emphasis on personal reflection also elevates the program above other professional development opportunities most fellows have experienced. Add to this the communications and influence training and the intensive immersion of three four-day seminar experiences in beautiful and remote settings. Companies comment on the quality of the program and some have expressed interest in the program as broader training for innovators and for high potential employees within their own firms.

A third success factor that enables the program to have impact beyond the individual fellows is that fellows are required to have at least two thought partners within their companies who help them conceptualize their projects and strategize about navigating organizational dynamics. The thought partner component creates accountability, broader thinking and greater likelihood that the project will succeed. It also gives fellows the opportunity for greater exposure at more senior levels.

Fourth, the rigorous focus on a project that is both innovative and strategically significant for the company grounds the learning. Given that companies are results focused, project successes enable fellows to leverage the learning they get in the program. As one thought partner said, “if you can come back with concrete project advances and then use it as a way to talk to people about the ‘softer’ skills that helped you do so, you are much more likely to get a hearing.”

Finally, the investment Aspen has made in external evaluation demonstrates a strong commitment to accountability and to a mission of continuous relevance, impact and responsiveness to suggestions from fellows for upgrades and improvements. The evaluation is also building Aspen’s capacity to serve as a resource/thought leader in how to develop social intrapreneurship, an area of growing interest.

“The experience has affected how I coach my team, bringing them a broader rather than a tactical perspective, and helping them be more effective. Given the size of my team, the Aspen experience has had a cascading effect.”

- Paul Tepfenhart, WalMart; 2009 Fellow