

Theory of Change Worksheet

Common Agenda – Vision, Values, Strategies

Spend a few minutes naming the core values and beliefs that vision is grounded in, including how it reflects economic success, dignity and belonging, and power and autonomy. Consider racial equity as both a process and a goal.

Our Vision Statement (*aspirational & ambitious future statement of what your community will look like. Ex: Forest City will be a place where all residents can be healthy, happy, valued, and financially secure.*)

What are the core values or beliefs that our vision is grounded in?

Improved outcomes (*What will you see if you are living in the vision? Ex: Increase in the number of city residents with low incomes claiming the earned income tax credit*)

- 1.
- 2.
- 3.

Activating your vision: What needs to change to reach these outcomes? (You can write down individual ideas about what needs to change in your community to realize the outcomes named and achieve your community's vision. Group these based on similarities, and decide as a team which ideas to keep)

Preconditions necessary for achieving change (What are the necessary preconditions to make each of these outcomes a reality? A condition that **MUST** be fulfilled before something else can happen.)

Sample preconditions	Your preconditions
<ul style="list-style-type: none"> ▪ Major employers need to see the value in raising wages. ▪ Banks need to remove fees or entry requirements that prevent people from opening bank accounts. ▪ We need banks in our community that are willing to construct branches in low-income neighborhoods. ▪ We need to include an emergency fund in our budget. ▪ The City needs to revise its participant data collection to include questions about race, ethnicity, gender, and disability for all programs. ▪ We need to partner with the local hospital to get additional data. ▪ We need to map our current infrastructure investments by neighborhood. ▪ We need to learn more community engagement methods. ▪ We need to identify which local nonprofits are currently doing community engagement. 	

Key Relationships & Partners needed to achieve this vision (*identify who should be at the table now to move from vision to action*)



Clarify your assumptions (*quickly summarize your assumptions heading into this work for each of the bullets listed below*)

- *The conditions and preconditions required for change*
- *The links between your conditions for change and your expected outcomes*
- *The potential reach of your work*
- *The roles played by your partners and the relationships between the partners, leadership, and the community*
- *The beliefs, values, and perspectives that have shaped your theory of change (i.e., How are you centering racial equity in your approach?)*
- *The staff and other resources you need and/or have available*