The Bridgespan Group

reos

THE ROCKEFELLER FOUNDATION

2014 Innovation Labs Survey

September 2014

Collaborating to accelerate social impact

Context for this survey

CONTEXT

- Traditional approaches to complex problem solving are insufficient to fully realizing our ambitions to solving the most challenging problems faced by poor and vulnerable people.

- Social innovation labs provide a useful approach. They offer a unique process that involves diverse stakeholders in a given field, creating an environment conducive to innovation and experimentation.

OBJECTIVE

Better understand

- The landscape of innovation labs

- The practice of innovation labs

- What is needed according to the field of innovation labs

About the 2014 Innovation Lab Survey

- The following materials include the results from a survey on innovation labs conducted by The Bridgespan Group, Reos Partners, and The Rockefeller Foundation.

- Survey responses were received from August – September 2014.

- The survey included responses from 76 innovation labs.

- The survey respondents, while not exhaustive, provide insights that are helpful in building an understanding of the landscape of diverse innovation labs

The innovation labs survey focused on three key areas

THE LANDSCAPE OF LABS
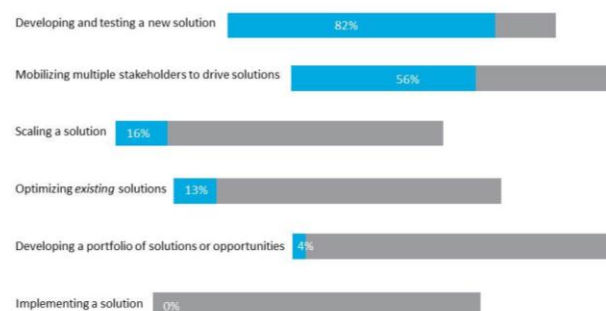
- What does the **landscape of labs** look like today?
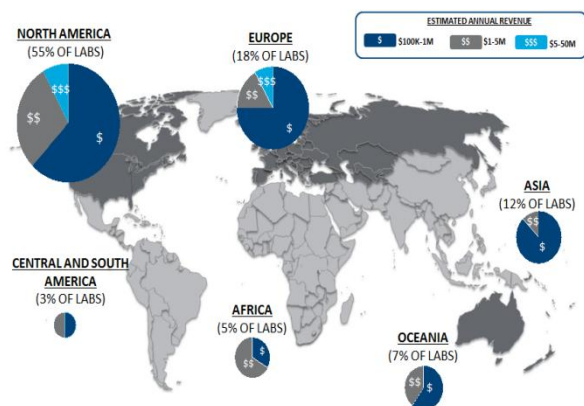
LAB PRACTICES AND IMPACT

- What does **lab practice** look like today?

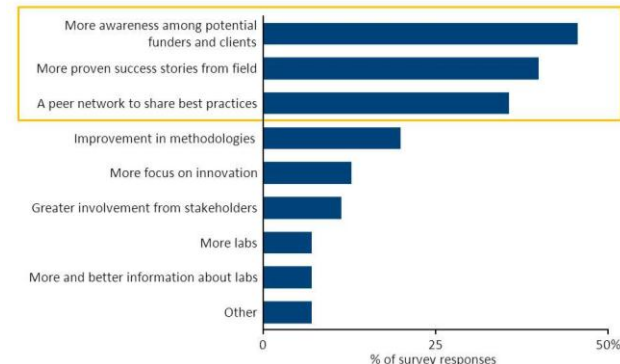## ADVANCING THE FIELD

- What will it take to **continue to build and strengthen** the sector?

The Public and Social Innovation Lab sector is an estimated $150M in revenue

Social innovation lab market size ($USD, M)
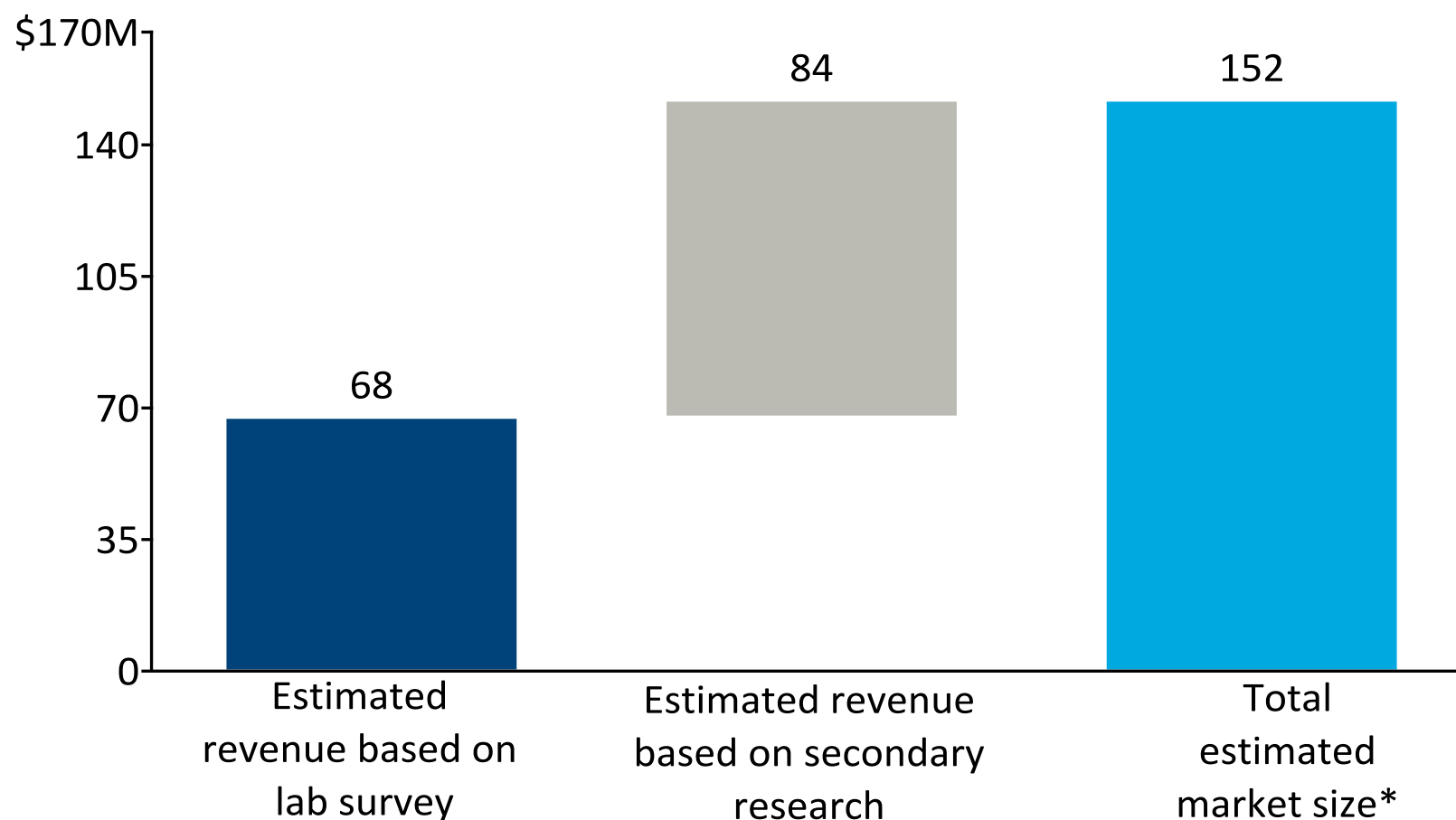
~70% of labs operate with an annual budget of less than $1M

Number of labs per each revenue category

| $ | $100K-1M | $$ | $1-5M | $$$ | $5-50M |

~70% of labs fall in this range

Annual budget dedicated to social and public sector work
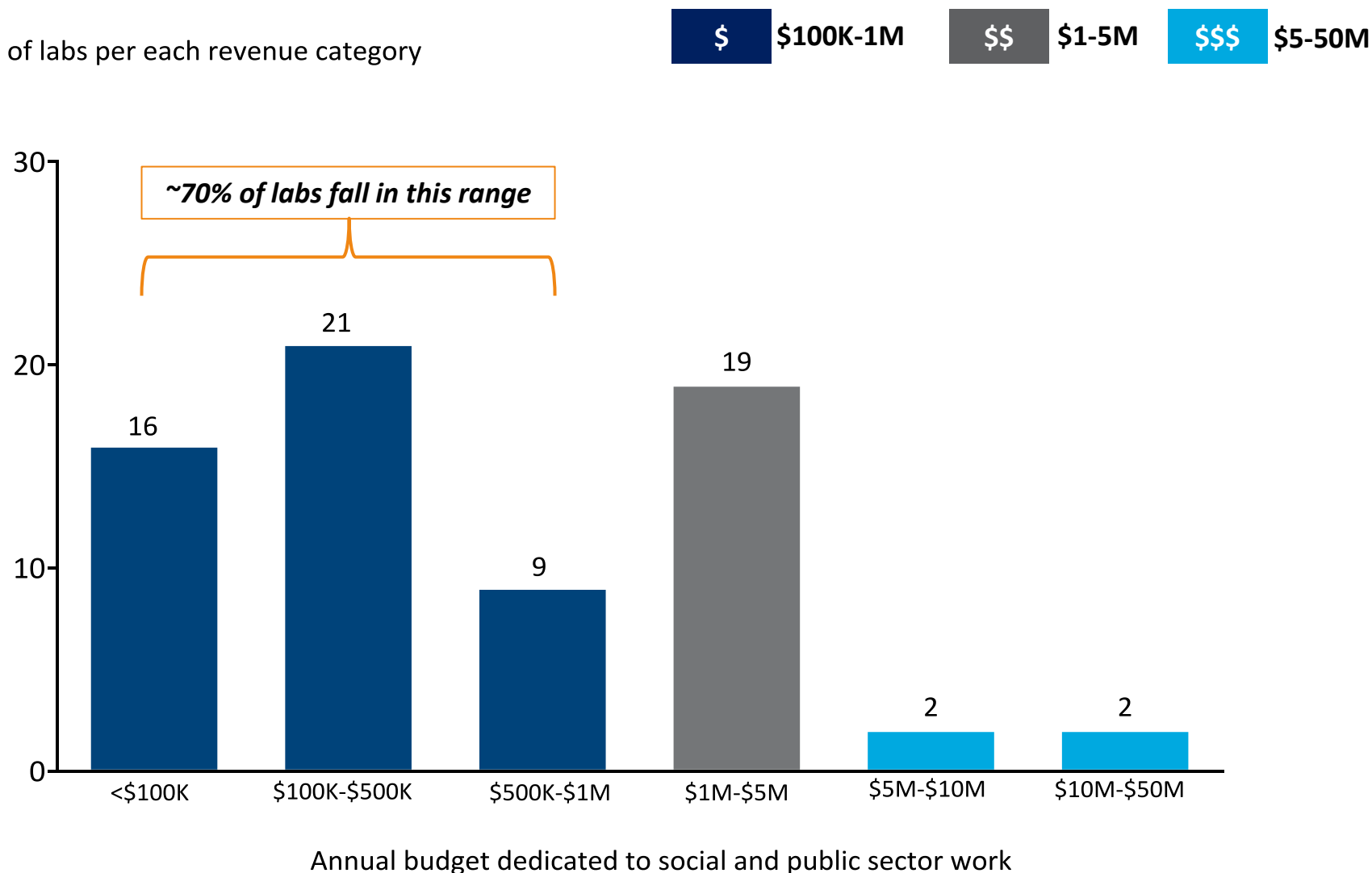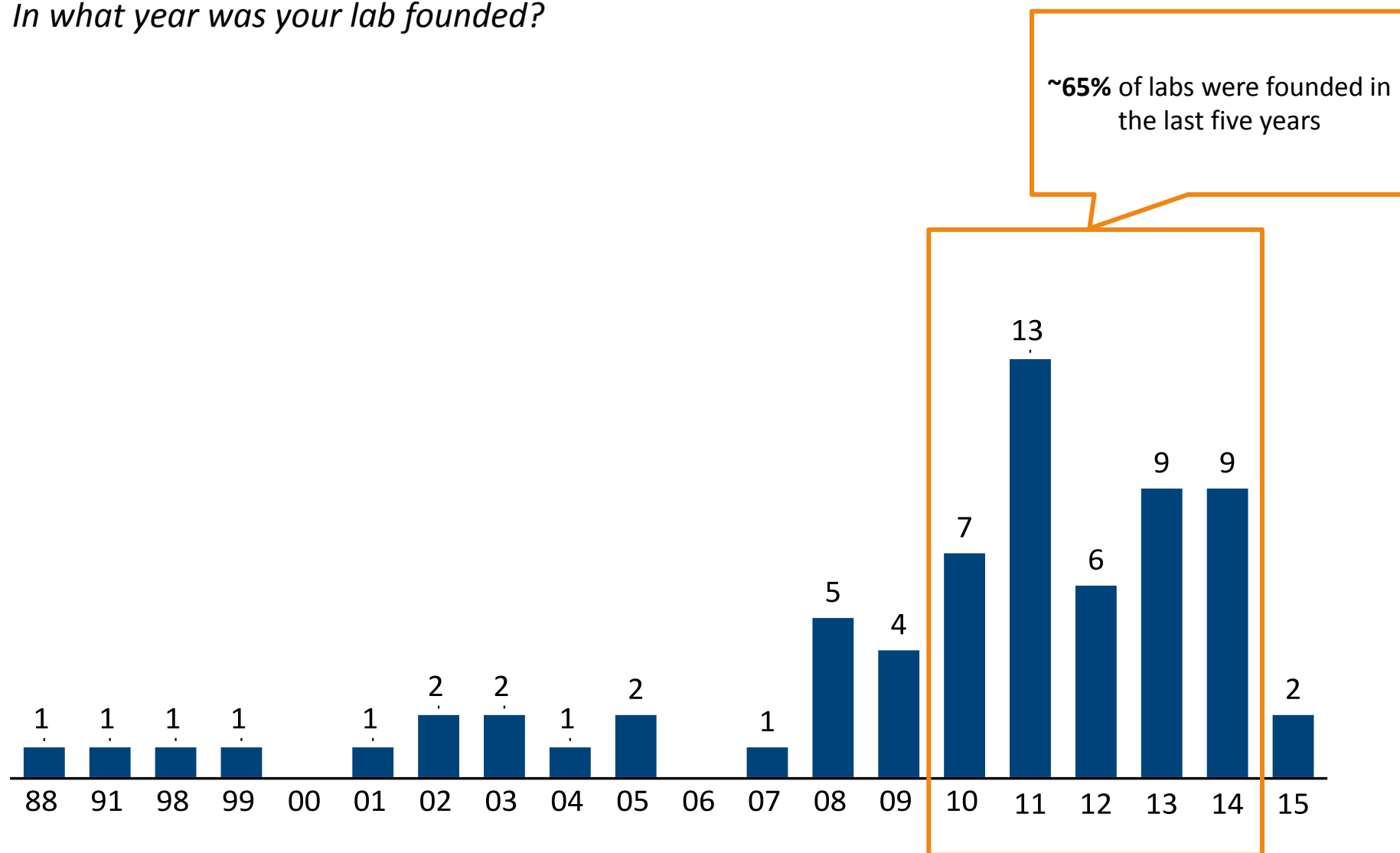
Note: Includes responses to the question "Please estimate your organization's total annual budget dedicated to social and public sector work" (N:59, 17 skipped this question). We've also included additional revenue information for 10 known labs identified through secondary research

The lab sector has experienced significant growth in recent years

Q. In what year was your lab founded?

~**65%** of labs were founded in the last five years

Note: Includes responses to the question " In what year was your first lab founded?" (N:59, 17 skipped this question)
Chart includes the founding dates of 59 labs from the survey along with founding dates for 9 additional labs identified through secondary research ; FROG design is an additional lab included in analysis that we haven't highlighted here as the organization was founded in 1969. We hypothesize that doesn't reflect when the social innovation lab was created

The majority of labs work across a range of sectors with public service, education, and health being the primary focus areas

Q. Which sectors does your lab focus on?

% of survey respondents

Never　　**Occasionally**　　**Frequently**
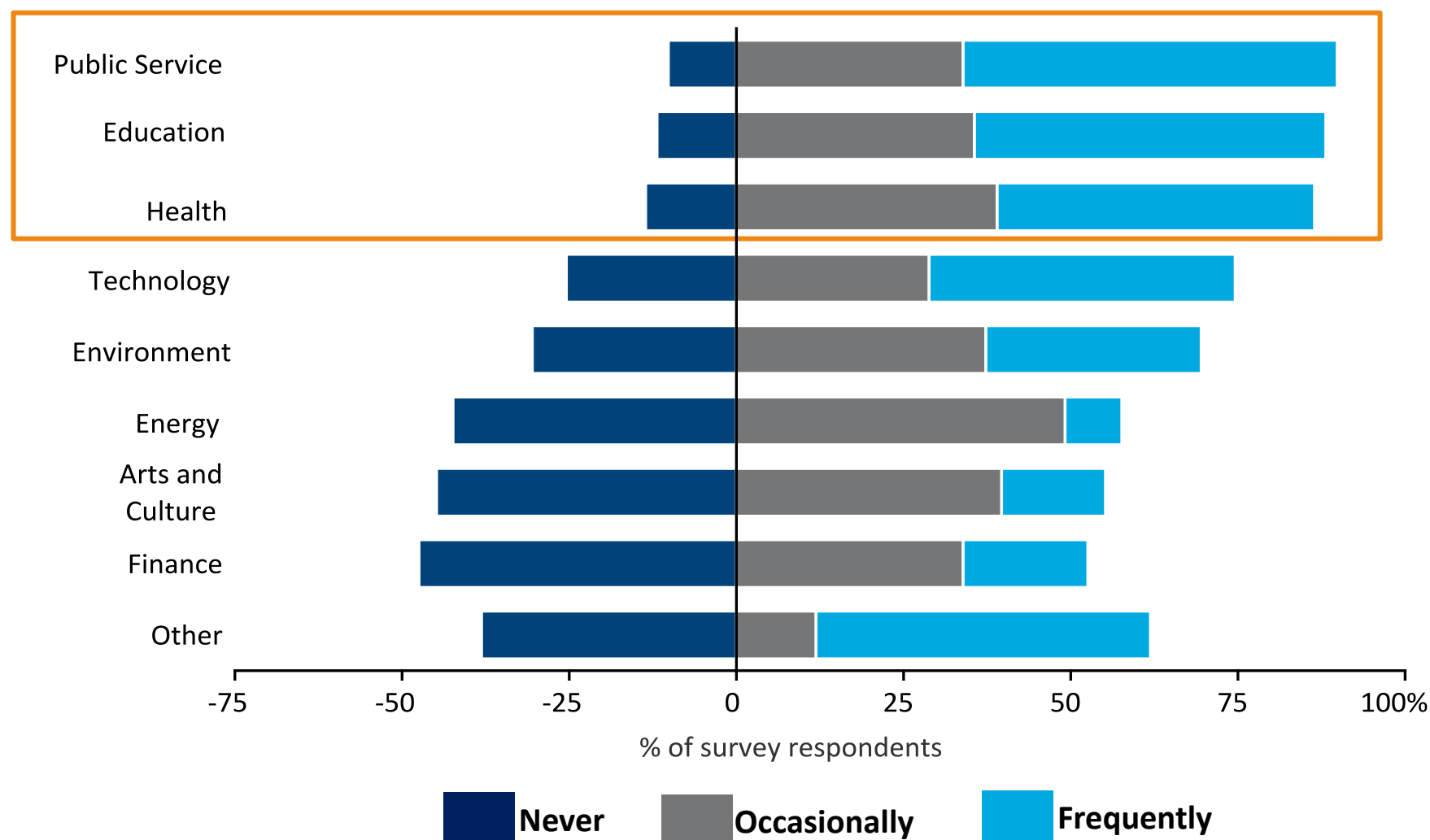
Note: Includes responses to the question "Which sectors do your lab(s) focus on?" (N:59, 17 skipped this question). Other includes sustainability, food security, agriculture, water, and sanitation, housing and social justice

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The majority of labs –and larger labs in particular—are concentrated in the Global North

NORTH AMERICA
(55% OF LABS)

EUROPE
(18% OF LABS)

ESTIMATED ANNUAL REVENUE

$ — $100K-1M $$ — $1-5M $$$ — $5-50M

Circle indicates total breakdown by number of labs; size represents percentage of total

ASIA
(12% OF LABS)

CENTRAL AND SOUTH AMERICA
(3% OF LABS)

AFRICA
(5% OF LABS)

OCEANIA
(7% OF LABS)
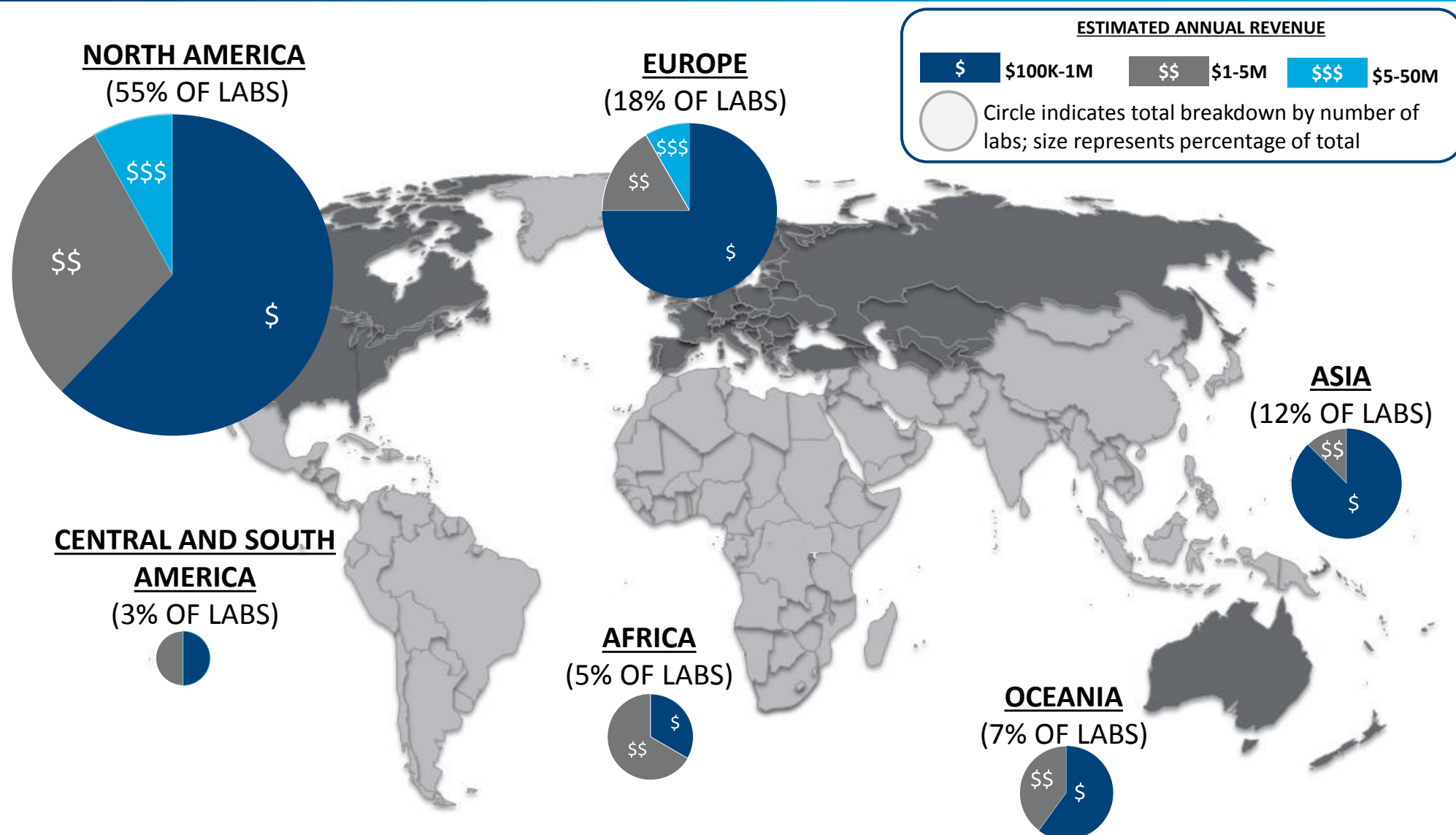
Note: Includes responses to the questions "Where does your organization have a permanent local presence?" and "Please estimate your organization's total annual budget dedicated to social and public sector work?"(N:59, 17 skipped this question). 3 respondents stated that their labs had no permanent local presence. Includes 10 additional labs identified through secondary research . The total labs adds up to 67 here (instead of 69)because two survey respondents didn't include both revenue and geographic information, key inputs into our calculations

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Labs carry out most critical aspects of work in their own facilities or in the field

Q. Where do you carry out the most critical aspects of your work?
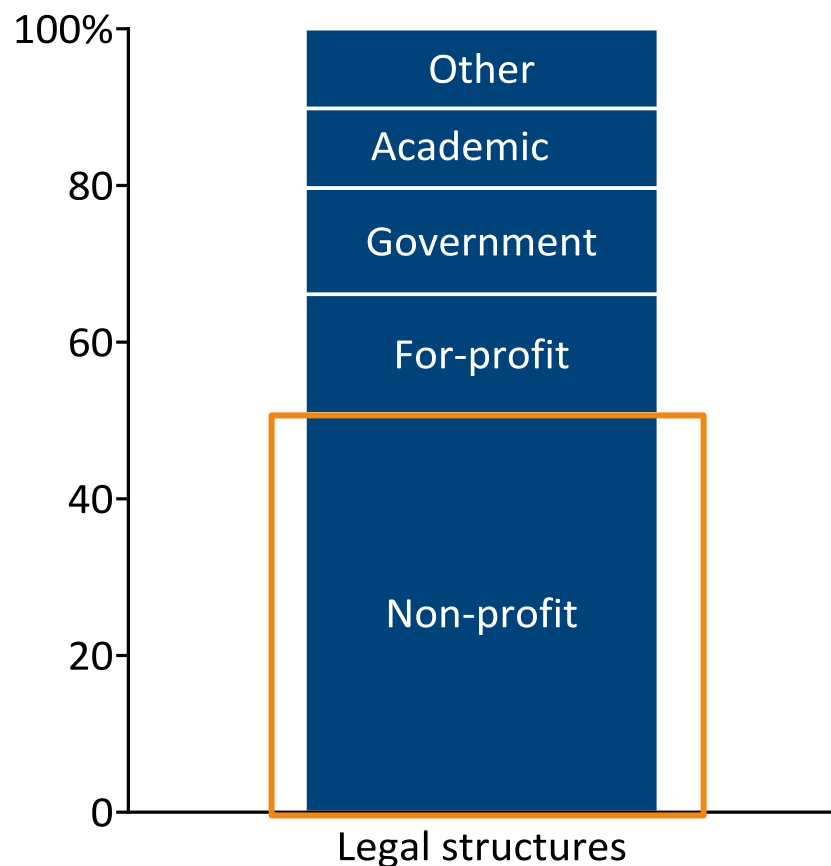

% of survey responses
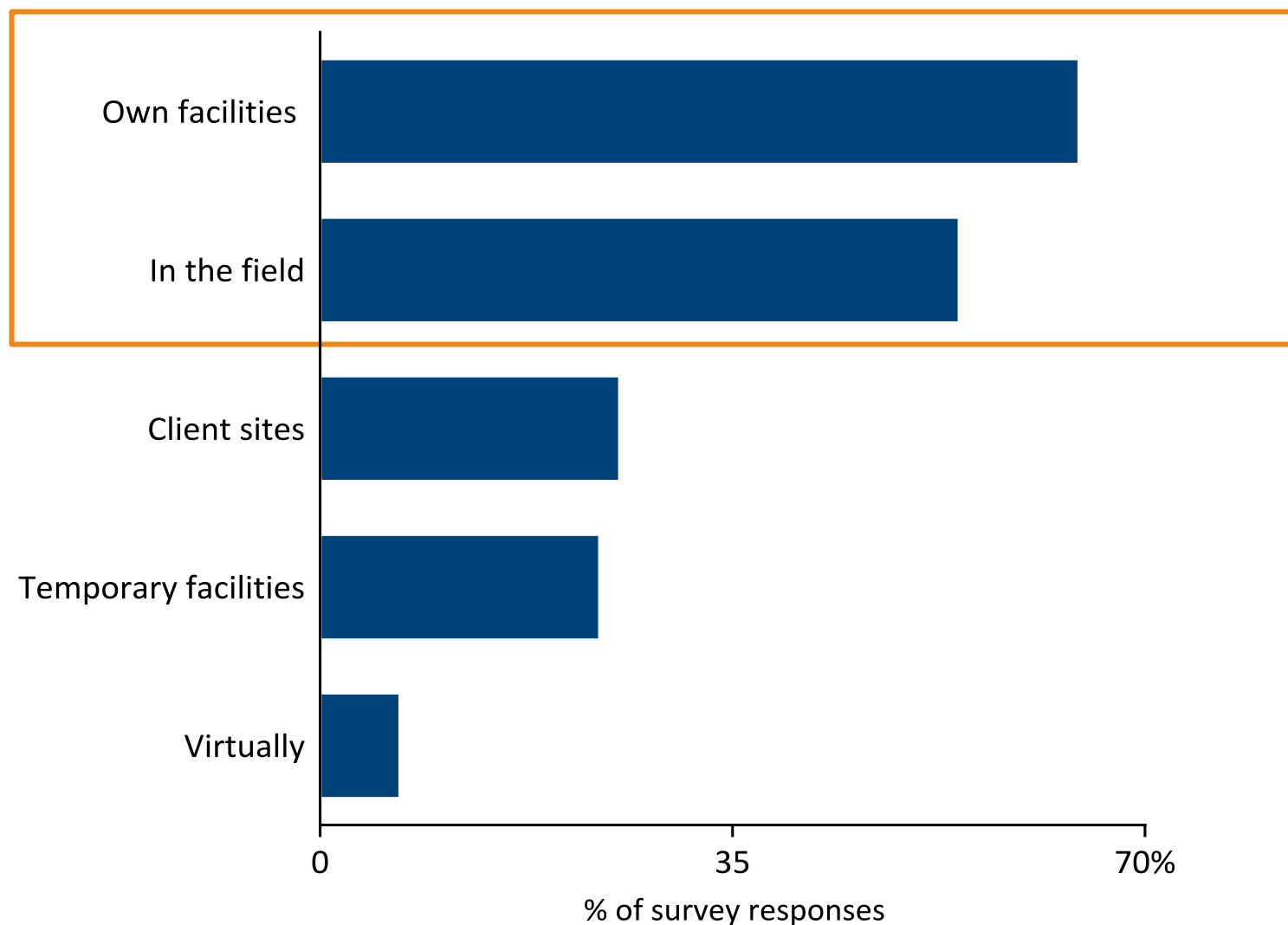
Note: Includes responses to the question "Where do you carry out the most critical aspects of your work?" (N:59, 17 skipped this question)

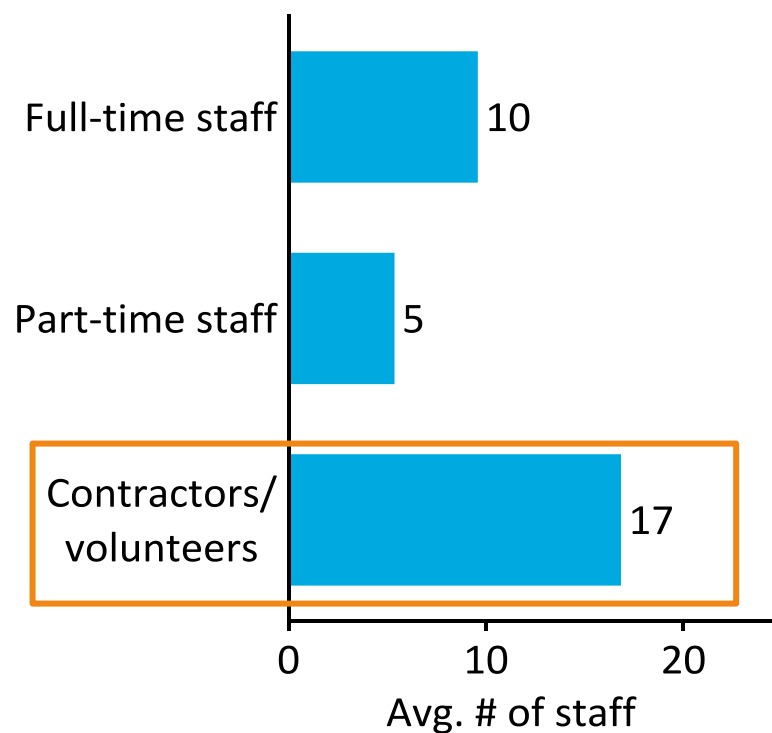# Most labs are nonprofits and operate with a small core

HOW ARE LABS STRUCTURED?

51% of labs operate as non-profit organizations

Legal structures (stacked bar, 0–100%):
- Other
- Academic
- Government
- For-profit
- Non-profit

HOW ARE THEY STAFFED?

Labs employ more temporary than full- or part-time staff

Staff type	Avg. # of staff
Full-time staff	10
Part-time staff	5
Contractors/ volunteers	17

Note: Includes responses to the questions "What is the legal structure of your organization?" "Approximately how many staff work in your organization today?" (N:59 ,17 skipped these questions) . We've excluded two labs from the survey given our hypothesis that the question may have been misinterpreted; our calculations are directionally in-line with the survey results. LHS: Other includes multi-laterals, international organizations, hybrid businesses within a larger network, and a network

While most labs host one off convenings at some point in time, three to twelve month engagements are more common
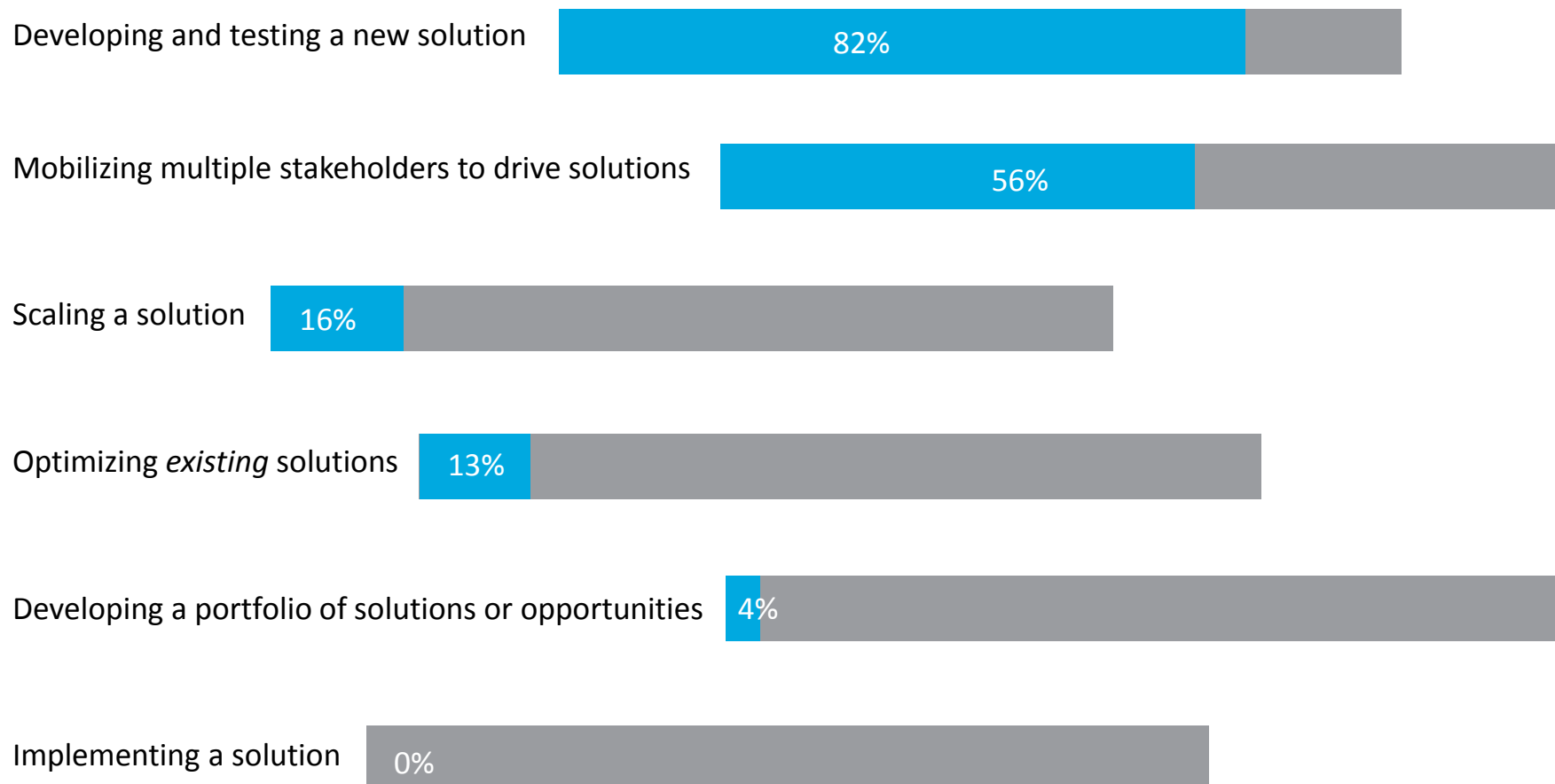
Q. What is the typical duration of your work?
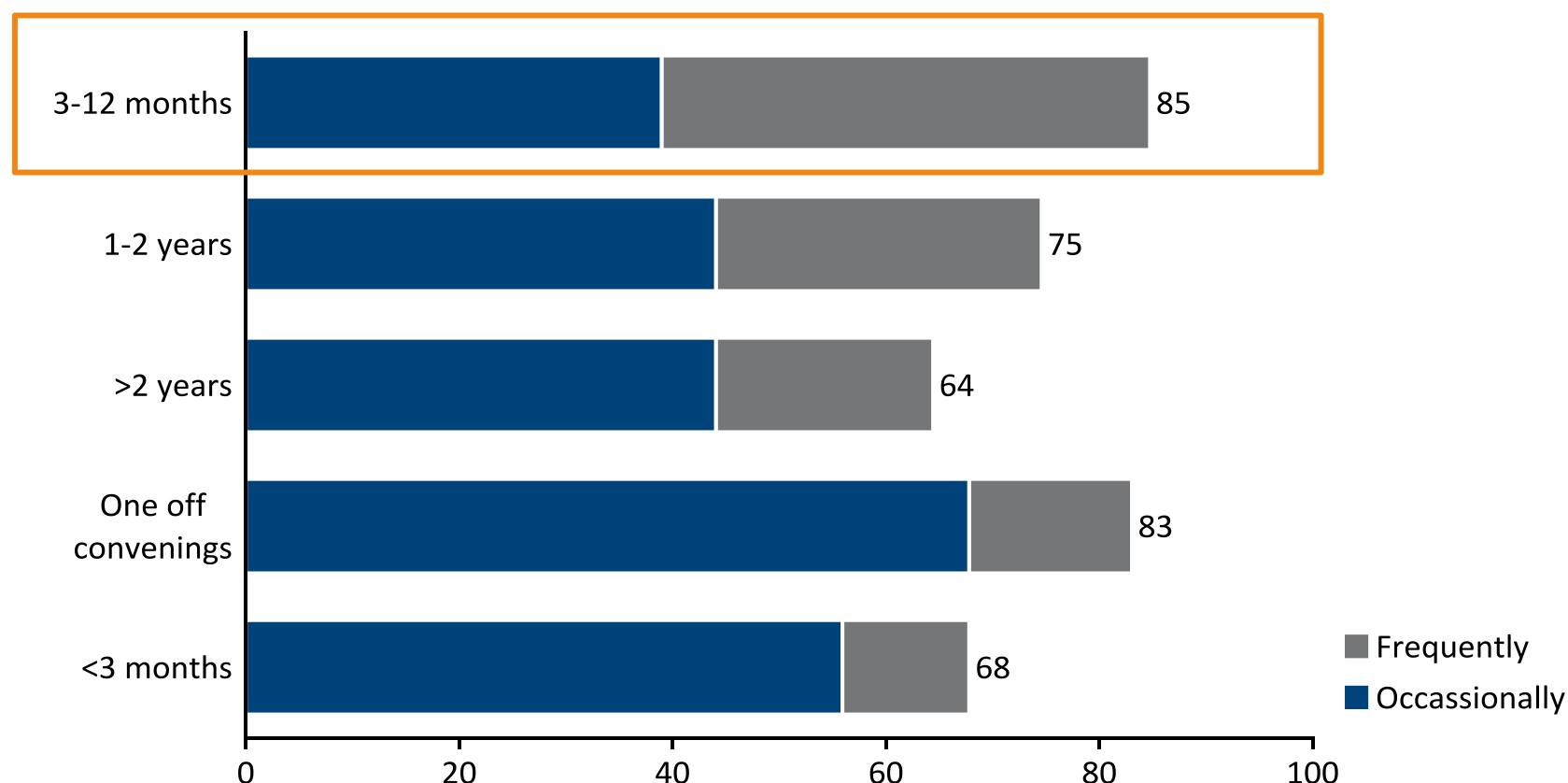
Note: Includes responses to the question "What is the typical duration of your work/lab" (N:59, 17 skipped this question). Other includes several times a year, permanent business entities, and initial one-year prototypes;

Labs primarily focus on developing and testing new solutions and mobilizing multiple stakeholders
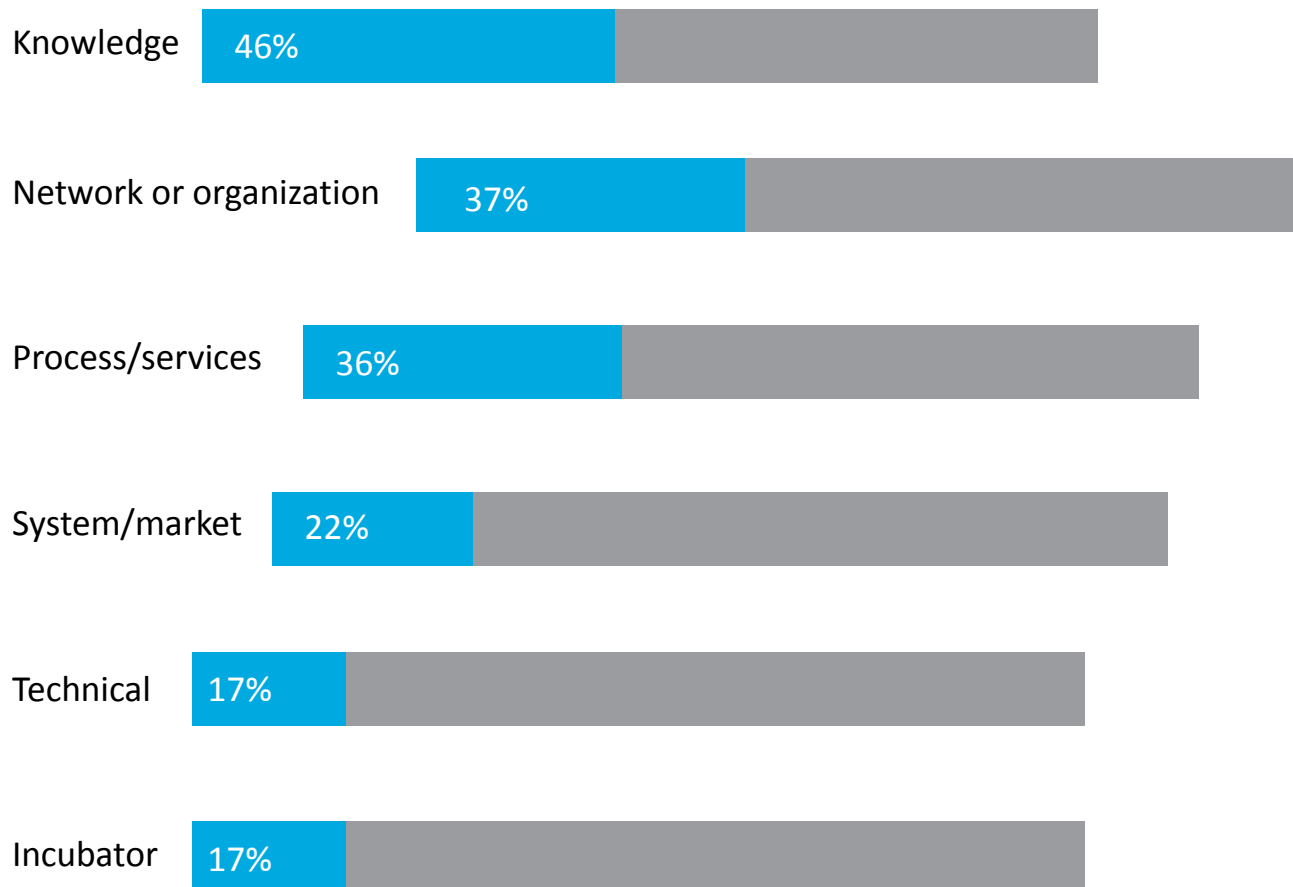
TYPE OF WORK

What type of work do labs engage in most often?

Developing and testing a new solution — 82%

Mobilizing multiple stakeholders to drive solutions — 56%

Scaling a solution — 16%

Optimizing *existing* solutions — 13%

Developing a portfolio of solutions or opportunities — 4%

Implementing a solution — 0%

Note: Includes responses to the question "What type of work does your organization engage in most often?" (N:76); 8% of respondents selected "Other", which includes envisioning possible future implications, supporting communities of innovators, transforming challenges into opportunities, linking existing solutions, and opportunity mapping

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Lab solutions most frequently take the form of knowledge creation and network or organization capacity-building

TYPE OF SOLUTION

*What forms do these solutions take?*

Category	Value
Knowledge	46%
Network or organization	37%
Process/services	36%
System/market	22%
Technical	17%
Incubator	17%

Note: Includes responses to the question "What are the most prevalent outputs that your lab(s) produce?" (N:76); respondents were allowed to select up to two option. 9% of respondents selected "Other", which includes strategic perspectives, prototypes, insights and opportunity areas, innovation capacity development, creative approaches and outcomes, and career-ready design professionals

A lab-based approach is particularly well-suited to achieve outputs as it brings together stakeholders through unique facilitation methods

Q. What makes a lab-based approach particularly well-suited to achieve desired outputs?
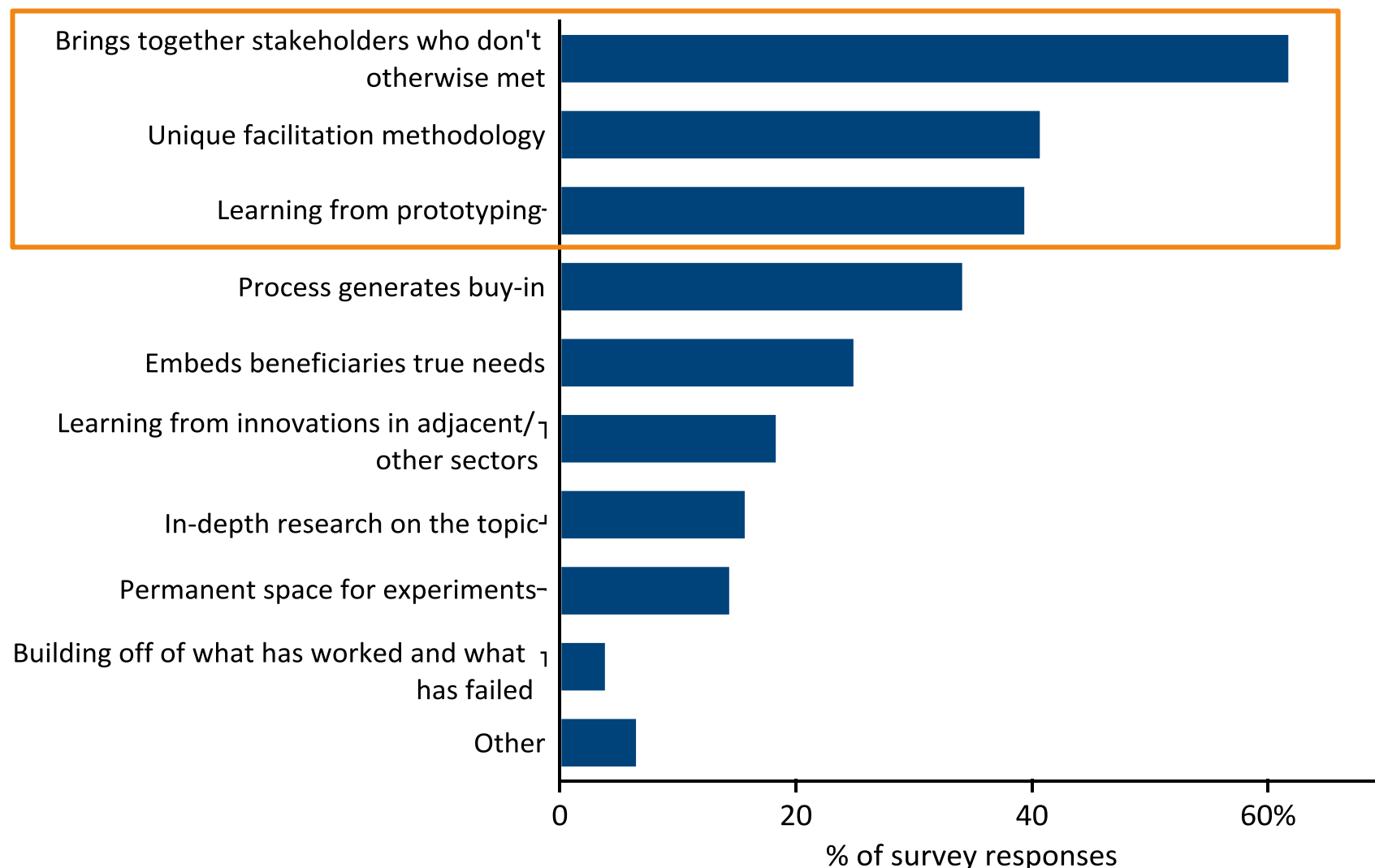
Note: Includes responses to the question "What makes a lab-based approach particularly well-suited to achieve these outputs?" (N:76); Participants could select up to three choices. "Other" includes organize students not experts on communities issues, internalization of failure as learning, and building trusting relationships

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Labs most commonly use design thinking, multi-stakeholder workshops, and prototyping

Q. What specific methods are used by your lab?

% of survey respondents

Never **Occasionally** **Frequently**
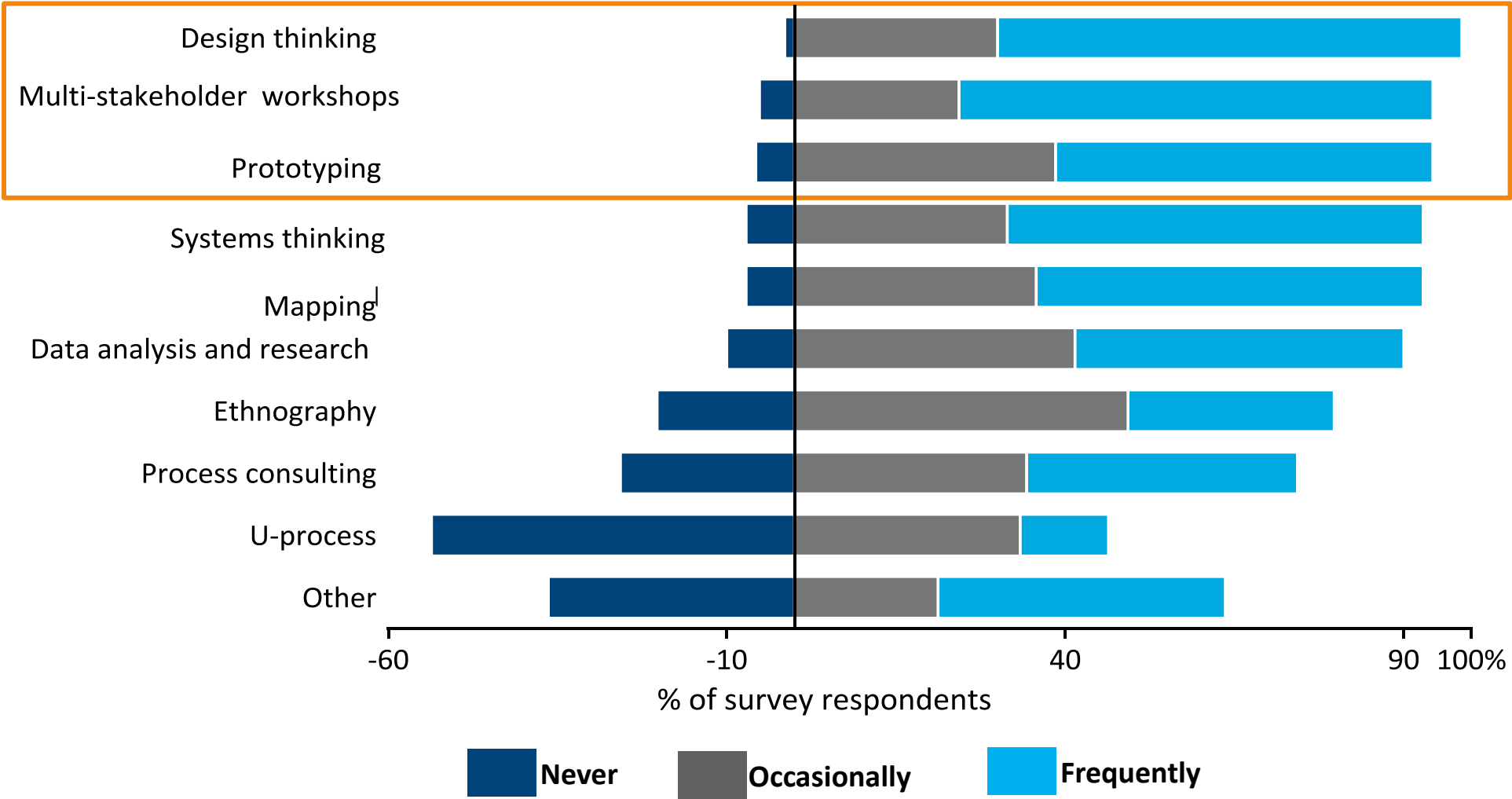
Note: Includes responses to the question "What specific methods are used by your lab(s)?" (N:70, 6 skipped this question).; participants were allowed to select all that applies; "Other" includes interaction design, dialogue, spatial meaning-making, service design, facilitation change management, failure case analysis, one-on-one conversations, and business model design

Labs measure their success by lives impacted and the quality and quantity of innovations produced through their work

Q. What are the primary quantifiable goals for your organization?
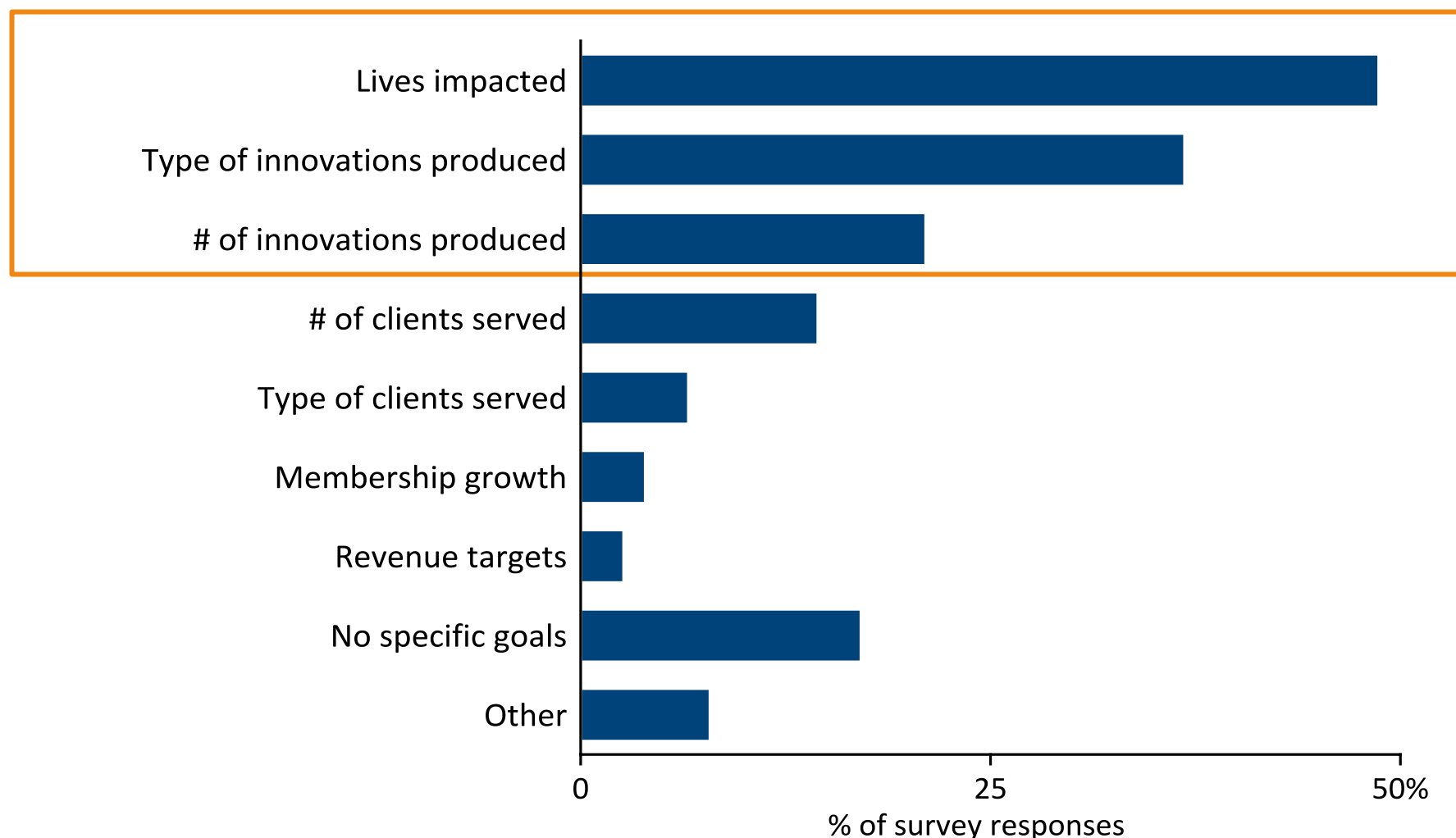
Note: Includes responses to the question "What are the primary quantifiable goals for your organization?" (N:76). Other includes citizen engagement metrics, advances in large scale innovation methodology, increased capacity and new habits, and systems change

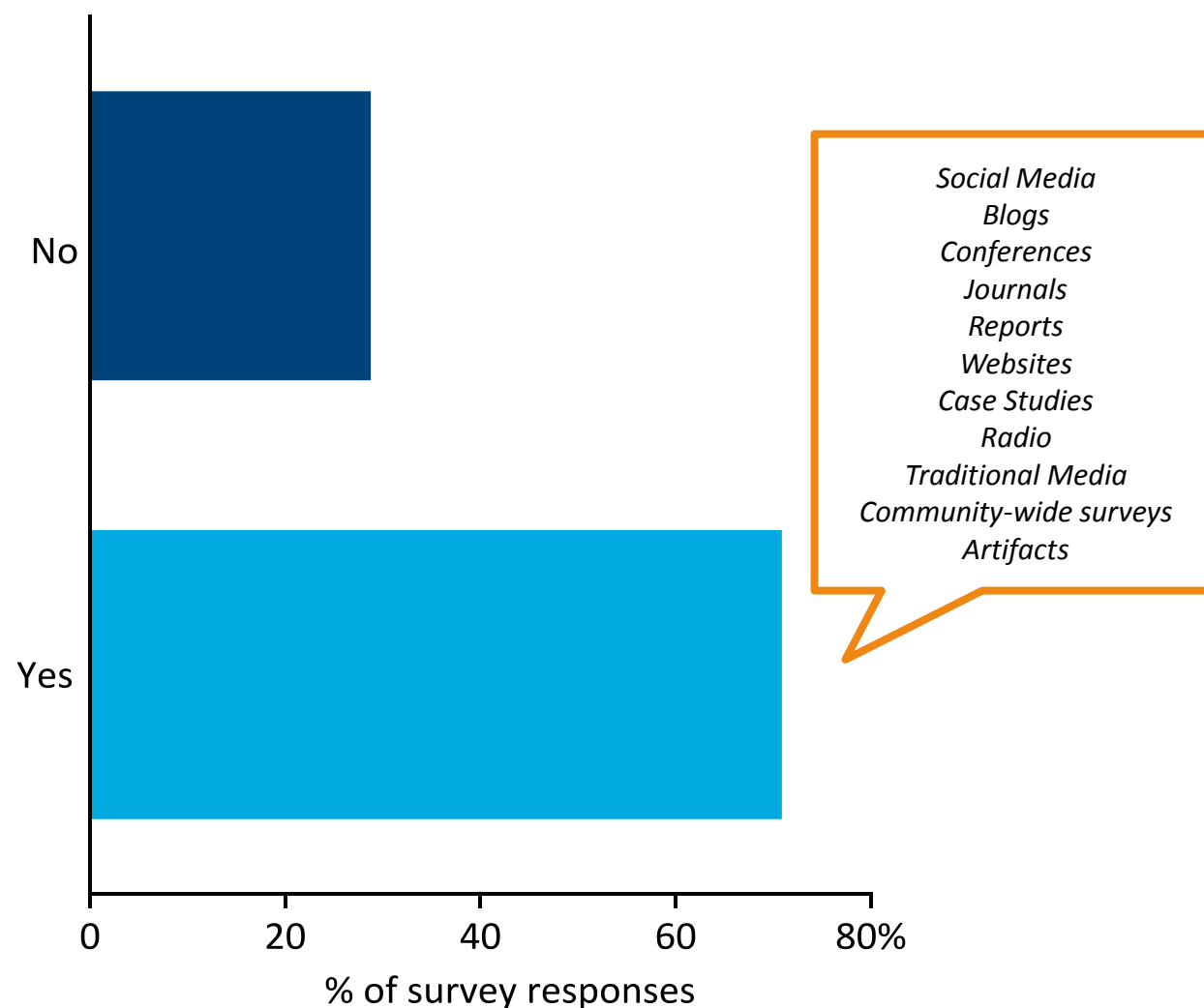# Today labs rely primarily on anecdotal evidence to measure results

Q. What statement best characterizes your lab's approach to measuring results?

% of survey responses
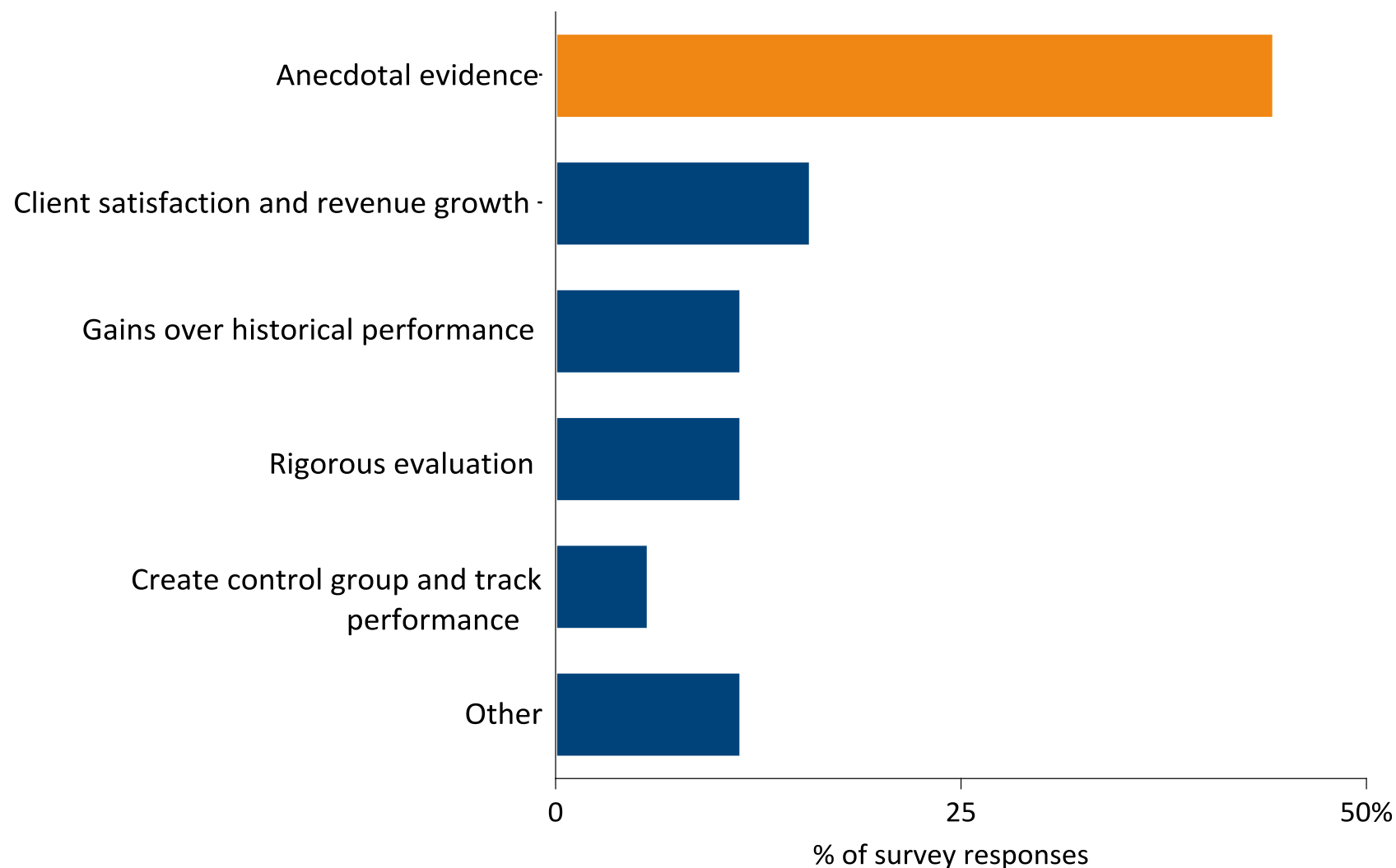
Note: Includes responses to the question "What statement best characterizes your lab's approach to measuring results?" (N:70, 6 skipped this question). Other includes measurement based on insights produced, opportunity areas, and prototypes that go on to be piloted, improved working systems, developmental evaluation, dissemination of knowledge, and community's ongoing commitment to work
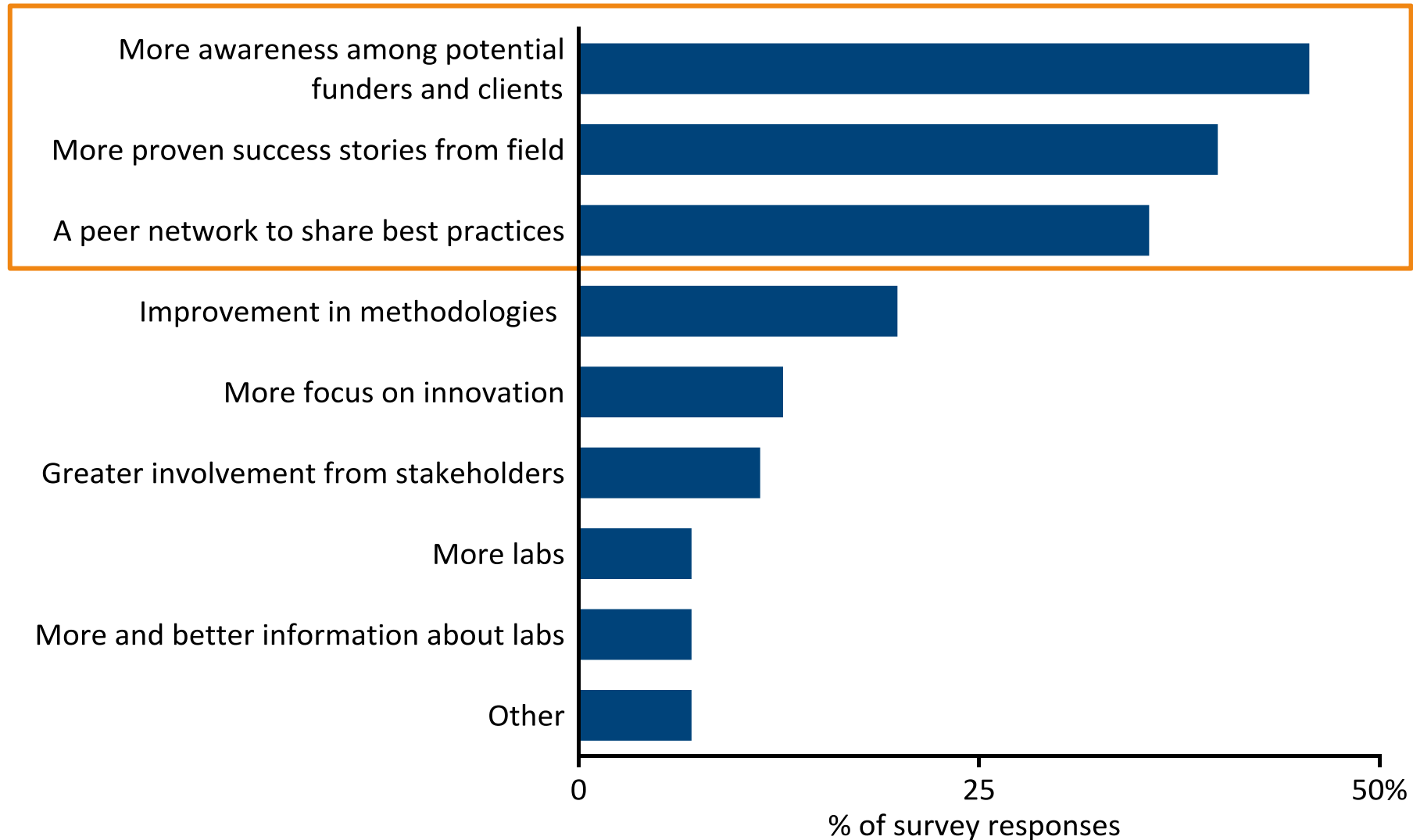
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The overwhelming majority of labs surveyed share results and knowledge publically

Q. Does your organization share results publicly?

Social Media
Blogs
Conferences
Journals
Reports
Websites
Case Studies
Radio
Traditional Media
Community-wide surveys
Artifacts

% of survey responses

Note: Includes responses to the question "Does your organization or individual labs share its results publicly?" (N:76)

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Labs cited more awareness among potential funders proven success stories, and peer networks as key to advancing the field

Q. What does the social sector as a whole need more of?

Thank you and please join the conversation on the Innovation Lab Insight Center hosted by Bridgespan and The Rockefeller Foundation

WEBSITE
Bridgespan.org/Publications-and-Tools/Innovation-Labs-Insight-Center.aspx

NEWSLETTERS, ALERTS, TWITTER POSTS & RSS FEEDS
Bridgespan.org/Newsletters

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