"It’s not just about getting the books into kids’ hands, or teachers’ hands. It’s about supporting the teachers to use the program the way it was intended to be used... with fidelity, and to ensure positive impact on student achievement and teaching practice. It’s the impact that is really important to us. Not just the volume.”

- Carine Kinch, JUMP Math Vice President of Outreach

“I sometimes wish I could travel back to my childhood to regain the time I wasted in self-doubt (and not just in mathematics). But I’m grateful to have found some faith in my abilities. One day, I hope that same faith will be considered the right of all children...”

- Excerpt from The Myth of Ability by John Mighton, JUMP Math Founder
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CASE STUDY

JUMP Math
INTRODUCTION
BY TRICO CHARITABLE FOUNDATION

Established in 2008, the Trico Charitable Foundation seeks to provoke innovation and build capacity in social entrepreneurship. We believe social entrepreneurship can be leveraged to close gaps in society.

For us, social entrepreneurship is any organization or individual, for-profit or not-for-profit, that uses markets and new ideas to solve social problems.

The Social EnterPrize awards celebrate leadership and excellence in social entrepreneurship across Canada. The awards are presented biennially and provide organizations with financial support as well as support for their public profiles via bespoke videos.

Storytelling is one of the most powerful forces in humanity. As a private foundation, we have learned that our work is better when we tell stories and when we listen to them. One of the great challenges to advancing social entrepreneurship lies in the way we tell our stories. What is needed are stories that reveal, and perhaps even revel in, the hard-fought journeys and extraordinary impact that are at the heart of being a successful social entrepreneur.

To these ends, we saw an opportunity with the Social EnterPrize recipients to have their story told in a much deeper way than we had ever attempted before. The result is a series of social entrepreneurship case studies that, in terms of the breadth of the organizations studied and the depth of the analysis, is the first of its kind in Canada. The subjects and the authors of the studies are as follows:

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Storytelling is no easy task, and these are no average journeys. For us, these stories have challenged our assumptions and have taken us deeper into social enterprises than we had seen before. The studies have exceeded our wildest expectations. For that, credit is due to each recipient, not only for their leadership, but their candour; and to each post-secondary institution, for its hard work and thoughtful analysis.

What we know is that our work has only begun. We hope you enjoy these studies, and that they entice you to tell your story. We are eager to hear from you @tricofoundation and will continue share our insights at www.tricofoundation.ca.
CASE STUDY
INTRODUCTION

What if all students could learn and love math with confidence? JUMP Math, JUMP stands for Junior Undiscovered Math Prodigies, is working to turn this aspiration into a reality. Through reimagining the mathematics teaching and learning experience, JUMP has seen tremendous success both inside and outside the classroom, operating as a social enterprise.

Social enterprises are an emerging phenomenon growing alongside the desire for a “more ethical and socially inclusive capitalism”. As a new concept, the definition of social enterprise is still debated, yet we know that at the core of a social enterprise is a social mission and they are often regarded as hybrid organizations. Social enterprises put social value at the forefront and employ market practices of for-profit ventures to attain their social mission, ultimately combining the worlds of for-profit and non-profit. In practice, this mixture can take a variety of forms, but the combination of business and social worlds is always in pursuit of a social mission.

At the core of JUMP is the social mission to increase numeracy, and in practice, a mixture of funding from foundations, corporations, individuals and government sources (non-profit practice) and revenues (for-profit practice) are used to support its mission. The inventor of the JUMP method of mathematics education and founder of JUMP Math is John Mighton. He holds a PhD in mathematics, is an author and playwright, an Ashoka Fellow, a Schwab Foundation Social Entrepreneur of the Year, and has been awarded a Special Citation as Ernst & Young’s Social Entrepreneur of the Year. His dedication to a scientific approach to education, coupled with the belief that all students can do well in math, helped make JUMP the successful program and organization it is today, reaching over 130,000 students (see Exhibit 1), through the efforts of over 25 staff members.

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WHAT IS JUMP?

In 1998, John Mighton began a kitchen table tutoring group that assisted elementary school students struggling with math, and in 2001 JUMP Math was incorporated. As a tutor John began to produce learning resources that catered to how students actually learn, engaging pupils who had previously believed they could never succeed. In the early years, JUMP’s expenses were paid for by grants and donations, and John and the other tutors were volunteers, though some coordinators were paid to schedule and recruit tutors.

The tremendous potential of his work soon became apparent. One student, who had been thought to have an intellectual disability, testing at the grade 1 level while in grade 6, exemplifies JUMP’s early success with one-on-one tutoring. Shortly after using JUMP, this student’s math scores leapt to the grade 6 level. Three years later, she entered grade 9 academic math in high school, and skipped a year. Without JUMP’s intervention, this student might never have realized her potential in math, having been labeled with an intellectual disability. In the early days, stories like this were common amongst JUMP students; however, it did not take long for John Mighton to recognize that JUMP’s reach was limited as a tutoring program, due to the labour intensity of one-on-one tutoring.

By what John Mighton calls “a stroke of luck”, teachers invited him to produce worksheets and other materials for the classroom. Soon after, JUMP staff entered the classroom as tutors, to help students within the formal education system. It was in the classroom that John Mighton saw the potential for JUMP to be implemented by teachers rather than tutors, and the possibilities for JUMP as a social enterprise.

At this time, the JUMP program began to charge for materials and training for teachers, and the program grew to have over 300 tutors in the classroom. John Mighton recognized the value of social enterprise then, because charging for training and materials offered the potential to sustain operations from revenues, without having to rely entirely on outside funding. This was the point at which JUMP adopted a social enterprise model to further its charitable mission.

In schools, John Mighton saw that the classroom provides an environment with benefits that individual tutoring could never offer. With his knowledge of the theatre close at hand, John Mighton reimagined the class as an audience that could experience excitement when learning as a group, rather than competing for teacher attention and grades as individuals. He calls this the “audience effect” and, if implemented appropriately, it allows all students, rather than a select few, to flourish. While John Mighton was developing the JUMP program to utilize the
“Teachers asked us to start producing some worksheets for them and that led to our first books. Recognizing that schools have limited professional development budgets, we then set out to create teacher resources that would enable educators to teach JUMP lessons effectively, with a minimum of professional development. Elementary school teachers have a very hard job. They must teach every subject and few are math specialists, so we had to be design our resources with that in mind. Our objective is to create effective, enjoyable lessons that can be delivered by any teacher.

Assessment was another challenge. Accurate assessment of what students have learned and where they are struggling is critical to enabling all students to succeed; but also very difficult to achieve, if lessons are not designed with assessment in mind. JUMP’s highly scaffolded approach inherently lends itself to effective assessment, but we also realized that we could write lesson plans, with continuous assessment built right in. We also found that making the assessment explicit has an important impact on teacher math knowledge and confidence. Even some extraordinarily gifted teachers, including a Prime Minister’s Award winning teacher, have told us that the design of the lessons has helped them to elevate their teaching practice, and many have told us that they have even applied what they have learned to ‘JUMPify’ lessons in other subjects.”

From there, JUMP began to further develop materials for the classroom. JUMP focuses most of its resources on classroom educators, although homeschoolers, parents and tutors use the program too. Today, JUMP’s program includes confidence building units, student assessment and practice books, teacher’s guides and professional development for teachers.

Teachers and schools implement JUMP in the classroom for a number of reasons. First, JUMP is designed by math experts, and its in-house writing team is dedicated to making math enjoyable and accessible for teachers and students. Second, the program is based on research, drawing from cognitive science to reduce student and teacher anxiety, build confidence, and minimize classroom hierarchies. Third, independent researchers have supported the program’s efficacy, through JUMP’s participation in research studies, and JUMP is committed to improving methods and materials based on those studies. Fourth, the materials provided use concise language and only include essential visual stimulus. JUMP wants to make sure that students are not held back in math due to difficulties in English class, while also ensuring diagrams and graphics enhance learning. Last, students learn together in a JUMP classroom. According to John Mighton, the program teaches educators “to teach [math] in a series of
sensible, well-scaffolded steps” that go beyond rote learning, to include “30 to 90 seconds of teaching followed by exploration, practice, assessment and real-time remediation.” This gives teachers frequent opportunities to identify where additional instruction or practice is necessary. John Mighton calls this the “guided discovery approach”, differentiating the program from the current trend in mathematics education, the discovery approach:

“Discovery is important but the research shows overwhelmingly that you need to break challenges into more manageable steps. Otherwise, kids suffer from what they call cognitive overload. Fortunately for us, there is now finally a rigorous body of research coming out that shows discovery doesn’t work on its own, it needs to be supplemented with lots of scaffolding... breaking lessons into sensible steps, manageable steps. Continuous feedback, elicited explanations, helping kids explain their answers, not just expecting them to come up with their explanations.”

JUMP’s approach to math learning is not the only thing that differentiates this social enterprise; JUMP staff members also hold a distinctive set of values. Built into JUMP is the goal to assist those in need, offering materials and services to low-income and at-risk students. For example, JUMP provides its program at no cost to classrooms in economically-disadvantaged communities as well as to over 20 non-profit tutoring programs. Over 4,500 students and their teachers and tutors are benefitting from this in the 2014-15 school year. JUMP’s Outreach Managers also work with Aboriginal communities across Canada, as John Mighton commented:

“One of our Outreach Managers, Liz Barrett... spends a very significant proportion of her time visiting and working with remote communities in BC, and she’s been able to develop the trust of those communities. She’s had communities where the elders have translated materials for use in preschools. She’s realized that one of the secrets to success is training the educational assistants because the teachers turn over so quickly in those communities. But she’s gradually building a very, very strong basis for JUMP in those communities.”
1.1 Balancing social and financial returns

JUMP Math believes that its social enterprise model advances its charitable mission. When asked about this balance, Scott McMeekin, JUMP’s CEO, commented that he didn’t see sales and social mission as dichotomous or in conflict, but that they were mutually reinforcing, as “one allows us to do more of the other”. JUMP defines organizational success through an analogy of Newton’s second law of motion, force equals mass times acceleration (F=ma). This analogy means that social impact (force) is equal to the number of students using JUMP (mass) in combination with benefits to students’ learning (acceleration). Both are necessary components to ensure impact, and they are maximized through the JUMP program, marketing and outreach.

JUMP is a registered charity, with a board of directors that is responsible for governance, reviewing and approving policies and the annual budget, and a management team responsible for strategy development, planning and implementation. The organization’s income (a combination of revenue from sales of learning materials and professional development, and philanthropic support from foundations, corporations, governments and individual donors) is generated to support its mission, and JUMP is committed to ensuring that every dollar earned and raised goes toward improving numeracy.

JUMP management has found that earning revenues has actually increased their ability to gain grants and donor funding, because donors are looking to support organizations that can become “self-sustainable” in their core operations. Ewart Newton commented on this, saying:

“Many donors want to see organizations become self-sustainable in core operations.... Earned income growth is often seen as a sign of vibrancy, strength, potential to scale, and the path to financial self-sustainability in core operations.”

When asked to comment on the specifics of how JUMP allocates philanthropic funding and revenue from sales, Ewart Newton commented:

“Income earned from sales is re-invested into the organization to further JUMP’s mission. JUMP is able to maximize educational and social benefits by charging most users for its program and reinvesting income into further spreading of its program. JUMP believes it can become financially self-sufficient in its core operations in Canada.

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3 See Exhibit 2 for more details on JUMP’s revenue and funding breakdown.
and the US within 5 years or so. However, some activities will continue to need significant external philanthropic support, such as Aboriginal education and new program development (e.g. JUMP Math for kindergarten and high school grades, and digitization).

1.2 Numeracy: An entry point

Every social enterprise needs an entry point, or a cause, and that entry point provides certain benefits or obstacles that influence the practices and organizational trajectory best suited for that environment. Social entrepreneurs like Mighton tend to be driven to engage by a sense of mission to solve a seemingly intractable problem and the nature of that mission has tremendous implications for the future. For JUMP, numeracy as an entry point has been beneficial for two reasons.

First, math success is easily measured. In contrast to a class such as English, it is easier to see when students are faltering and when they grasp concepts, providing constant feedback for teachers, students and JUMP. This makes the measurement of numeracy – or social performance – comparably straightforward. When asked to comment on the details of JUMP’s measurement of social performance, Ewart Newton, Vice President of Development commented:

“JUMP measures impact using the formula F=ma, where ‘m’ equals the number of students using the program and the ‘a’ is the degree to which using JUMP Math accelerates their learning progress. We measure ‘a’ based on third party research trials and feedback from educators. The JUMP Math program has been independently tested in a rigorous trial and found to produce superior results. In a randomized controlled trial by researchers from Toronto’s Hospital for Sick Children, the University of Toronto, and the Ontario Institute for Studies in Education, children who were taught using JUMP Math were found to have progressed at twice the rate of students in the control group. The Lambeth School Board (London, UK) tracked a group of students who used JUMP Math for two years, starting in grade 5. At the outset, only 12% of the students were at, or above, grade level yet 60% passed the challenging UK national exams after two years. Impact is also expressed in terms of social return on investment (SROI). In a social return on investment (SROI) assessment JUMP is estimated to produce $57 of social return for every dollar invested.”
For many social enterprises, there is a constant struggle to measure social performance, and build a language of the social impact that is as clear as financial language and measurement. This struggle often ends in disaster, with the business-side of a social enterprise overtaking the social mission. However, JUMP assesses impact based on reach and acceleration of student learning mitigating this risk due to the presence of a discernible, measureable language of social performance.

Second, math ability is considered to be one of the best predictors of long-term success in our society, and excelling in math has other benefits such as building confidence. Thus, the discourse in the education sector about math’s importance makes JUMP an obvious target for philanthropic support, because (1) JUMP’s social mission resonates with powerful donors who care about numeracy, and (2) JUMP has an impressive track record of achieving measureable social benefits. A series of partnerships and opportunities central to JUMP’s success came from this combination, including John Mighton’s fellowship with Ashoka in 2004, which led to an introduction to The Bill & Melinda Gates Foundation and an invitation for John Mighton to attend a Gates Foundation retreat, as well as recognition of JUMP as a “better way to teach math” by David Bornstein of the New York Times, a TEDx talk, grants for capacity building from The JW McConnell Foundation and LIFT Philanthropy Partners, and opportunities to have the JUMP program tested by independent researchers at leading institutions, including Toronto’s Hospital for Sick Children, the University of Toronto, Johns Hopkins University and the University of Calgary. Foundation, corporate, government and individual support and partnerships with external researchers helped build the legitimacy of JUMP, all beginning with an entry point that resonates and a mission, impact and metrics that are easily understood.

Of course, JUMP’s success is not merely a function of entry point and metrics. While math may be a perfect place to start, JUMP still needed to make critical choices regarding how to improve numeracy, and most importantly how to grow as they faced obstacles along the way.

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As an organization grows, it may go through stages of internal development, beginning young and entrepreneurial and ultimately becoming a mature, collaborative organization. Each stage of growth has a distinct management style and particular challenge to overcome and, to advance through the stages, organizational members must surmount the major internal challenge associated with the current phase. While JUMP Math is too young to have gone through all of the developmental stages, the organization has begun the process.

JUMP has also faced its fair share of obstacles in the marketplace that have been overcome, shaping the JUMP management style. For example, in JUMP’s early days many significant influencers in the education industry were not interested in the program, as they thought JUMP used the rote method of learning, rather than guided discovery. At that time, and still today, there is a strong push against reliance on rote learning in education, a view that JUMP Math shares. Thus, this misconception about the foundations of the JUMP method was frustrating for the JUMP team; however, they found a way to grow regardless of it. Individual teachers began to see the potential of JUMP in the classroom, which led to an approach to growth that focused on the grassroots. Teacher by teacher, often through word-of-mouth, JUMP began its entrance into the classroom as the program’s popularity grew at the grassroots. Today, the grassroots are still an essential part of JUMP’s growth model and decision-making about which math program to adopt, although JUMP is now having greater success in engaging school board and district decision-makers. Next, we will look into the development of JUMP as well as the marketplace challenges the organization has faced in the early days.

### 2.1 Two obstacles to overcome

The first stage of organizational growth is characterized by creativity, as the organization perfects its product and discovers its market. During this phase, the founder often desires to focus on the technical side rather than management, internal communication is informal, long hours are worked, and management decisions are tied to immediate customer feedback. John Thompson, Vice President of Operations and Finance at JUMP, commented on this early stage, saying that JUMP has tended to have “entrepreneurial way of doing things here. Everyone did what they could do to keep things going forward.”
JUMP’s management faced three major challenges in the early stages of the program’s development. First, there were resource constraints. With charitable status, JUMP did not have the ability to raise large amounts of capital for investment in rapid growth, meaning that the management team had to operate under the resource constraints similar to that of other young charities while attempting to grow in a market dominated by well-capitalized, large for-profit institutions. The second issue was timing, JUMP entered the Canadian market between materials acquisition budget cycles (i.e., after the last round of acquisitions was complete) and introduced a teaching pedagogy that is markedly different from the relatively open-ended discovery approach that was highly favoured by Ministry officials and senior administrators at that time (this is now changing). Third, as a small organization, JUMP found it hard to compete with the influence of large for-profit textbook publishers with seasoned experience in the industry. These challenges were overcome through a combination of what the management team calls ‘disciplined opportunism’ and the advantages of being a social enterprise.

2.2 An emergent strategy: disciplined opportunism

At the time, the decision-making style at JUMP was exemplified by what Scott McMeekin calls ‘disciplined opportunism’, “a pull strategy designed to allocate resources efficiently and avoid wasting scarce resources pounding on locked doors.” Describing the term, Scott McMeekin said, “you need to be opportunistic, but not blindly so … opportunities must be evaluated and scarce resources allocated where they are likely to generate the greatest impact, as measured by ‘F=ma’.” This method of decision-making is marked by its ability to adapt quickly and efficiently as the environment changes, or to be emergent. Rather than devising an overarching strategic formulation and implementation plan with little room for flexibility, JUMP’s management knew that their limited resources needed to be used in a more effective manner. Because the strategic planning of multi-million dollar firms isn’t best suited for a young organization, they focused on finding allies and incremental opportunities – such as management’s constant assessment of partnership opportunities considered above.

When asked to comment further on JUMP’s emergent strategy, Scott McMeekin said, “it really speaks to the lack of resources… and the critical importance of not banging your head on closed doors if there are some ones that are already ajar.” He went on to give an example of this, making the choice to not pursue a prospect until there was a clear opportunity:

“We had a grant from The Winnipeg Foundation. We did a math conference in Winnipeg and it was very well received. We partnered with the University of Winnipeg, but there was a lot of resistance to our approach at the board and provincial ministry
level. We had been thinking that we wanted to put someone on the ground in Winnipeg and we decided not to. But the people we had partnered with continued, on their own, to really work on the situation and press the need to look at different approaches to teaching math with the Manitoba Ministry of Education, which revised the math curriculum standards somewhat during the summer of 2013 and then last fall JUMP was made a recommended resource... We’re now looking for how we can get someone on the ground in Winnipeg.”

2.3 The value of social enterprise

According to John Mighton, operating as a social enterprise with charitable status, rather than for-profit venture, was worth it, “Certainly it would be better to get a lot of investment upfront if we were for-profit, but I think it’s very dangerous.” In his eyes, the danger of for-profit education is the pressure to sell what conforms to the prevailing orthodoxy instead of the best product for students. And the benefits of being a charitable organization went beyond pressures to sell, trading the ability to gain early capital investments for allies in their social mission.

To overcome resistance to the JUMP program, JUMP management moved its attention away from institutions toward teachers, following its emergent, disciplined opportunism approach to decision-making. Emphasizing teachers, JUMP grew classroom by classroom. This method of growth worked because teachers were interested in allying with JUMP as a charitable organization, and JUMP management was willing to work with teachers to make the program better. When asked to speak on JUMP’s growth, Carine Kinch, Vice President of Outreach, observed:

“It’s been the grassroots, it’s also been putting ourselves out there saying, By all means, at the end of the day we want to have a positive impact on kids. If there’s a better way to do this we’re open to subjecting ourselves to constructive criticism... We’ll change the program if we find a better way to do it.”

Scott McMeekin points out that, while the JUMP approach remains true to its roots, the content and format of program materials has, indeed, evolved significantly from its early days, in large part, based on criticism that wasn’t always easy to hear, but was ultimately taken to heart.

John Mighton spoke similarly, saying “teachers love that side [being a social enterprise] so much; it may help us become a movement”. Being a social enterprise became a source of
competitive advantage at JUMP, as its charitable status and adherence to social mission before profit resonated with educators as a cause worth taking part in.

Alongside allying with teachers, philanthropic support was central to JUMP’s growth at this stage. As described earlier, JUMP management’s constant willingness to partner provided the organization with a broad social network to build resources as well as legitimacy, despite being a small organization. These partnerships were the product of JUMP’s mission of numeracy, the management team’s adherence to measuring social value, and their willingness to engage with anyone with an open door to assess opportunities, then determining when and where significant investment could be justified (JUMP’s emergent disciplined opportunism approach).

2.4 Leadership and the value of giving up control

After a certain amount of growth, the founder or original management team of a social enterprise will no longer be able to take on all of the management responsibility. At this point a question needs to be answered, who is best suited to lead the organization as it develops? Answering this question causes turbulence for many organizations, often because the founder does not want to give up control of day to day operating functions and decision-making power. Yet, at JUMP the leadership problem was not a function of the founder, but the management structure. On the topic of letting go of control, John Mighton said:

“I think a lot of social entrepreneurs want to do everything and want to retain control of everything and that sometimes holds them back. So I can give you an example with the writing of the teacher’s guides. When we first hired our writers, they were mathematicians with education backgrounds, but it took about a year or so to really get them embodying the methods and I learned from them too... but just getting them trained to the point that we were all writing good books together... I was tempted to just write everything myself, but I stuck with it and now we have a team of about 10 writers who are all great, great writers... I am gradually going to do less and less writing. It’s the same in every area.”

John Mighton’s motivations are different from many entrepreneurs, which may be an important insight regarding how to grow fluidly as a social enterprise. During early growth, John Mighton did not want to manage JUMP, and he only started taking a salary from the organization because writing program materials meant there was not enough time for him to write plays, his other passion and prior source of income. Allowing others to manage the organization, John Mighton could spend time doing what he did best, writing learning materials with the editorial team at JUMP, ensuring that their product quality remained high as the organization grew, as well as being the public ‘face’ of JUMP.
Though John Mighton was willing to give up management control, the path was not without its rough patches. Early on, before the current management team and board of directors were in place, management resources were limited and the board of directors was heavily involved in operational matters. However, over time the board shifted its focus to governance and policy-setting, and recruited experienced, professional managers. As John Mighton commented, “We’re in a very good place now. Better than ever.”

When asked to comment on how JUMP clarified the roles of the executive team and the board, Ewart Newton said that a board member was brought in with expertise in board governance who helped make sure the organization had a structure that created healthy boundaries between the executive team and the board:

“It took a while to find the right mix of people for the board and senior management. In the early days, the board needed to step in and help in our daily activities because we didn’t have enough staff. As JUMP grew, the board transitioned out of operational involvement to governance and policy-setting roles. This is probably a challenge that many start-ups face. The board transformation was led by one of JUMP’s executive directors who brought in a board member who was a very senior executive and an expert on board roles.”
2010 UNTIL TODAY

While JUMP’s early growth was typified by resistance from the education industry and resource scarcity due to its charitable status, using disciplined opportunism, allying with teachers, and taking on partnership opportunities has allowed JUMP to flourish, reaching over 130,000 students today. Recently, JUMP’s management team doubled to four members, with the introduction of a Vice President of Outreach, responsible support for teachers in the classroom and relationship development, and a Vice President of Operations and Finance, working to build product development, operational infrastructure and processes and financial capacity to support rapid growth. These two new members were recruited to help JUMP face its next major challenge, further growth both inside the organization and the classroom.

3.1 Internal growth: aligning talent

JUMP’s current stage of growth involves the introduction of more complex operations, systems and processes. Having hired two new executives to support its increasing level of activity and prepare JUMP for continuing rapid sales and growth (see Exhibits 1 and 2) the top management team is now taking advantage of further opportunities for growth. Today, JUMP’s decision-makers are still using disciplined opportunism, though in combination with what Scott McMeekin calls a more “targeted” approach to growth. When asked about the place of disciplined opportunism in the organization at present, Scott McMeekin commented:

“We’ll continue that approach, but we also want to be able to be a little more targeted. So rather than just waiting for people to express interest and assessing how real the opportunity is – which is what we’ve tended to do until now – we want to be going out and looking for those opportunities.”

At JUMP, the move towards a targeted approach is exemplified by the hiring of John Thompson and Carine Kinch. Both have extensive business experience, and were top talents in their previous work. John spent 24 years in financial services, preparing him to bring business processes into JUMP’s operations, and Carine spent about 20 years in the education publishing industry in various sales positions. Their hiring also gives an important insight to the growth of a social enterprise: when bringing in people with business experience it is also very important to make sure that their values and background align with the organization.

JUMP management found and screened one of their new management team members through their social network, while providing the other opportunities to discover the program
prior to hiring. As an illustration of this, John Thompson was introduced to JUMP through connections at Habitat for Humanity. JUMP and John conducted mutual due diligence through a recruiting process in which John met with JUMP’s CEO numerous times, as well as other members of the management team. Scott also arranged for him to meet the Board Chair, when he learned that they had worked together early in John’s career. Carine also spoke about the process that led her to leave a sales management position at Pearson to work for JUMP, highlighting the importance of having the opportunity to speak with a number of independent researchers who were designing studies to test JUMP’s efficacy, as well as teachers, in making her decision:

“In making my decision to accept this position, I spoke with researchers and to teachers who have used JUMP Math. I was impressed with the story of JUMP, and the mission-driven culture, but what convinced me was the results of the rigorous efficacy research that has been done to date. Simply put, the program works and there is solid data to prove it.”

3.2 Building objectives, starting with dialogue

John Thompson leads the implementation of an operating plan developed by the executive team and JUMP recently went through a human resources review. The executive team operating plan matches resources to high priority organizational goals and ensures focus by management, increasing the degree of specialization in the organization while keeping everyone on track. John Thompson commented that in creating this year’s operating plan:

“I have taken the executive team through a facilitative process, to create an operating plan to agree on the four main objectives for the year; identifying who will lead different strategies under those objectives. This is to make sure we don’t get distracted, that we stay on course.”

Important insights can be gleaned from how JUMP management built this operating plan. First, the process was iterative, as everyone in the organization was included in a dialogue to decide what the most important goals of the organization were. By asking every organizational member what their goal for JUMP was, John Thompson found unanimous agreement for the organization’s F=ma measure of success, which dictates that JUMP must strike a balance between reaching as many students as possible while ensuring that “standards did not drop in the process” or are improved. Thus, everyone agreed that maintaining or increasing quality while increasing reach were two core objectives for the organization.
Two further operational objectives were determined through awareness of these goals. First, the team built their reach and quality goals into the budgeting process, to ensure that the organization always has enough resources to execute high quality work while sustaining growth. According to John Thompson, “this allowed JUMP to set a third objective for funding needs, along with specific tactics to raise the required funds to complete the identified activities.” Regarding their fourth objective, John Thompson commented:

“given the extraordinary growth potential, the process and discussion highlighted the need to bring a strong operational foundation, and several new competencies were identified that require development...this led to the fourth objective to create a high performance culture and associated competencies.”

Through dialogue around organizational goals, the two central objectives were affirmed (reach and quality). Together, they drive objectives for funding, organizational culture and competencies, giving direction to the 25 plus staff members of JUMP Math.

### 3.3 Outreach and sales

On the sales side, more complex systems and processes are being built too. Carine Kinch is working to formalize a plan to execute on JUMP’s outreach strategy to create growth. The outreach team consists of frontline staff members who train teachers to use the JUMP program, while also building relationships with educators and school boards. Currently, each member of the team has extensive teaching experience and, with her expertise in publishing sales, Carine Kinch has helped to build processes and materials for her team who do not have the same sales background, allowing JUMP to benefit from the combined sales and classroom education experience.

JUMP had identified the upgrading of its professional development (PD) and implementation of a customer relationship management system (CRM) as high priorities. In the case of the PD project, it had also raised funding and identified a potential partner, but needed a seasoned manager to drive its execution. Carine Kinch is now taking the lead on PD development and managing the relationship with Johns Hopkins University, JUMP’s partner for this project. As Carine said:

“My outreach team is fantastic but they’re all very different and bring different experiences to the table... Our PD workshops were not necessarily consistent. When I first arrived here, they affirmed an interest in creating a more consistent professional development program that was based in pedagogically-sound instructional design.
principles, and that set teachers up for success. The vision is also to create a ‘train the trainer’ model to increase capacity for PD. We will create a program where we are arming JUMP Math classroom teachers with the tools and resources to effectively deliver JUMP Math PD. That’s one of the projects I’m working on right now.

The implementation of a CRM system is another big priority... to create a system that will help us track and analyze information about our customers in order to quickly make informed decisions and expand our reach.”

Today, Carine Kinch is dealing with a big question. Does she continue growing the sales team with classroom educators who are well-versed with the program and able to communicate it to others teachers from experience, or does she also hire salespeople, who might not be able to build the same rapport with teachers, but have publishing industry know-how? She is ever aware of the impact hiring salespeople might have on the team, as the grassroots have been an important part of JUMP’s growth. However, she also knows that future growth may happen quickly, and that it takes longer to train a teacher to do sales than it does to hire a seasoned salesperson. As Carine Kinch said:

“I love that we have an outreach team consisting of passionate teachers spreading the word and supporting schools with the implementation of the program. It is an important differentiator for us and builds credibility. I’m trying to assess whether we just grow that model or whether we mix it with more sales people to qualify and close new opportunities, leaving the outreach team to focus more on the PD and support. I’m still gathering information and learning.”
4 GOING FORWARD

Throughout JUMP’s history, a number of interrelated challenges and approaches to growth have been central. At first, in a marketplace dominated by large publishers, it was difficult for the JUMP method to have the chance to shine. JUMP completed its Canadian classroom edition shortly after a round of math program procurement had occurred across the country. JUMP staff had little success knocking on the doors of administrators and bureaucrats. The organization’s early success was the result of adoption by individual teachers and, according to John Mighton, ultimately “a stroke of luck”. Classroom by classroom, JUMP was implemented by passionate teachers motivated to work with JUMP.

4.1 Eight practical insights for social enterprises

Eight key insights can be gleaned from JUMP’s story.

First, though often overlooked, a social enterprise’s entry point is an essential part of organizational success. JUMP’s focus on numeracy meant that social impact is readily measurable, something often difficult for a social enterprise, allowing the value of its work to be defined in unambiguous terms. Alongside math’s importance in the education discourse, this meant that JUMP’s social mission resonated with powerful potential partners and producers of rigorous researcher, providing opportunities for growth and legitimacy of the JUMP program.

Second, when facing challenges, rely on what makes you different. This meant using its social mission to JUMP’s advantage and, when institutions’ doors were closed, finding allies in teachers, who were willing and excited to work with a charitable organization. Though charitable status meant trading off funding opportunities because it could not offer equity investments or attract commercial loans, it also provided the opportunity to focus all its attention on advancing numeracy in students, the reason why teachers continue to implement JUMP in the classroom today.

The resource constraints of being a charity also led to JUMP management to develop an emergent decision-making style, which they call disciplined opportunism. Disciplined opportunism allowed the team to manage resource constraints by focusing less on investing in targeted locations, and instead being open to what happens around them, constantly looking for partnership opportunities and ways to make the program better. In taking this approach, partnerships led to further partnerships, and research led to legitimacy and awareness, enabling JUMP to grow through the help of friends.
**Third**, when managing organizational growth it is often beneficial for a social entrepreneur to give up the role of day to day operational leadership. In the case of JUMP, John Mighton’s focus on maintaining the social mission made sure that JUMP could grow smoothly. By giving managerial control to others, John Mighton could focus his efforts on the quality of the program, spending his time taking a lead role in program development and being the public face of JUMP.

**Fourth**, it is important to have a clear board structure where responsibilities are clearly defined. Early on, because JUMP did not have sufficient managerial resources, the board of directors was involved in operational matters. However, as experienced, professional managers were recruited the board focused on governance and policy-setting and responsibilities are now more clearly defined. A new board member was brought in at that time, with expertise in board structure, to ensure boundaries were set. Since then JUMP’s internal growth has been smooth.

**Fifth**, it is important to align talent with your organizational goals. Recently, at JUMP this happened in two ways. First, through using their network in the hiring process, such as how John Thompson was recruited; and second, through having new hires like Carine Kinch speak with researchers and teachers before deciding to join JUMP, both to encouraging engagement and assure fit. Aligning talent means getting the best of both worlds – combining extensive business experience with the passion for social change.

**Sixth**, it is important to build organizational objectives via dialogue throughout the organization. Where you find agreement (in the case of JUMP, consensus) you know you’ve found the core of the organization. However, don’t just stop at your core objectives, next ask, “how will we get there?” At JUMP this meant recognizing reach and quality as imperative, and concluding with functional objectives around budgeting and culture to achieve reach and quality. The set of objectives may vary by organization, but it is important to have agreement regarding what the organization wants to do and how it will get there.

**Seventh**, charities that adopt a social enterprise approach have a unique and powerful opportunity to blend the use of income generated from revenue and philanthropic funding. JUMP’s ability to augment philanthropic funding with earned revenue has enabled it to do more to support the development of new programs, build core capacity, subsidize use of JUMP by economically-challenged communities, including Aboriginal education. All revenues are funneled back into the organization to increase the program’s impact. Ultimately, JUMP wants to use philanthropic funding to help fund classroom resources and PD subsidies for particularly challenged communities and to develop new or improved programming, while income from self-generated revenue is used to become financially self-sufficient in ongoing core operations, with plans to do so within the next five years.
**Eighth**, it is important to remember why the organization became a social enterprise. JUMP is a charity, and by selling materials and training services it is able to expand the impact of its social mission. Now that JUMP has adopted a mixed-model, philanthropic donors are even more interested in supporting the organization because it is on track to becoming self-sustainable in its core operations — something many donors look for.

All told, the future looks bright for JUMP Math. Today, the writing team is working hard to produce materials for elementary and middle schools in the United States and agreements have been struck with a number of school boards in Canada, an unimaginable achievement just a few years ago that represents a shift from resistance to cooperation by institution-level decision-makers. Through the support of passionate teachers and partners, as well as a vision of the tremendous potential of students, this social enterprise has seen amazing growth, and there are plans to continue, as John Thompson commented, “we’re just seeing the tip of the iceberg.”
Exhibit 1: Student Reach

The graph below includes students reached via sales and the provision of books supported by philanthropy.
Exhibit 2: Revenue and Funding

JUMP Math changed to an April 30 year-end in (Financial Year) FY 2013. To allow comparability, the graph below shows FY12 revenue from sales for the 12-months ending April 30 and June 30. Because May and June are significant sales months, sales for May 2012 - April 2013 were less than for July 2012 – June 2013.

* Excludes royalty advances from 2014 (digital) license agreement
** Estimated

June 30 Year-end to 2011, changed to April 30 Year-end in 2012
CASE STUDY

JUMP Math
ABOUT THE AUTHORS

Queen’s School of Business, Centre for Social Impact

The Queen’s School of Business Centre for Social Impact was founded in 2004.

The Centre’s mission is to educate students and foster outreach, research and advocacy on issues of social impact.

It does this by:

• Fostering education in the fields of responsible leadership and social impact
• Supporting research and providing advice in our key focus areas
• Providing support for communities
• Being a global advocate on issues of responsible leadership and social impact.

The work of the Centre focuses around three key areas:

• Integrity (Issues of ethics, values, trust, transparency, and courage)
• Innovation (Domains of social innovation, social finance and social entrepreneurship)
• Investment (In our students and communities and our future)

The authors of this case study are Daniel Samosh, graduate student, and Dr. Tina Dacin, Director, QSB Centre for Social Impact and the E. Marie Shantz Chaired Professor of Strategy and Organizational Behavior at the Queen’s School of Business. Currently, Dan is interested in understanding the efficacy of development initiatives, such as microfinance. Tina’s research interests are in the areas of social innovation, institutions, and culture.