# AIM

## ACTIONABLE IMPACT MANAGEMENT

**01** Groundwork

**02** Metrics

**03** Data

**04** Communication

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# Groundwork.

## A Framework for Social Impact Strategy

ASIA PACIFIC
**SOCIAL IMPACT CENTRE**
MELBOURNE BUSINESS SCHOOL

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FIRST OF A 4-PART SERIES OF EBOOKS,
ACTIONABLE IMPACT MANAGEMENT (AIM) VOLUME ONE: GROUNDWORK
IS DESIGNED TO HELP YOUR ORGANIZATION MAP OUT THE FOUNDATIONAL
ELEMENTS OF YOUR IMPACT MANAGEMENT STRATEGY

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### Silicon Valley Social Enterprise

SoPact is a social enterprise in the San Francisco Bay area that strives to bring technology expertise to the social sector. SoPact brought its knowledge of accessible technology tools that support operations processes around impact data. Contributing team members include Rachel Dodd, Lorena Rodríguez, and Unmesh Sheth.

## Asia Pacific Social Impact Centre
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The Asia Pacific Social Impact Centre (APSIC) is the University of Melbourne's hub for education, research, and action in the field of social impact. APSIC researchers Dr. Krzysztof Dembek and Dr. Jodi York co-authored this report and contributed their expertise of impact measurement process and best practice to this eBook.

# ACTIONABLE IMPACT MANAGEMENT

## AN INTRODUCTION TO THE FRAMEWORK

## What it is

Actionable Impact Management (AIM) is designed to assist in defining an internal organizational framework. This is executed by establishing an enduring impact measurement process which is primarily data and outcome oriented. AIM's objective is to outline a roadmap for your organization to follow in the hopes to reaching a point where you are able to more accurately and effectively communicate your impact to multiple stakeholders.

Impact Management refers to an organization's ability to define an impact framework that is practical and enduring and translate insights through effective communication on impact via your website, reports, content generation, etc.

This guide is designed for functionality and accessibility of content, complete with instruction and activities to work through the process. The thoughtful introspection required by 'Volume One: Groundwork' makes it the most time intensive of the AIM series. Groundwork lays the infrastructure for all subsequent impact measurement practices.

## What it isn't

Actionable Impact Management is not intended for grant management or the monitoring of activities. This guide is not a deep-dive into the theoretical considerations of the processes but will reference additional resources for those that want to gain more substantial insights into any of the topic areas. Each organization is unique in its own entity, therefore AIM is not intended to serve as a one-size-fits-all practice.

# ACTIONABLE IMPACT
# MANAGEMENT
## FRAMEWORK STEPS

# VOL 1 | GROUNDWORK
# IN THIS VOLUME

# GROUNDWORK

We have entered a new era of impact reporting; one in which social interventions are held to a new, higher standard of impact assessment. Stay ahead of this wave by utilizing existing technology to equip you with the tools you need to collect, assess, and demonstrate your impact. Volumes 2-4 are dedicated to the technicalities of this process, however, the key to a successful impact framework is a solid foundation. This first Volume, Groundwork, is about deciding what data makes the most sense for you to collect, assess, and demonstrate.

Although the groundwork phase is the most demanding and time intensive of the AIM volumes, it is the most insightful and most importantly is the most fun.

We hope you enjoy it, but mostly, we hope it helps to lay a path for your organization to enter this new era as a role model for others. This is a deeply personal exercise which makes it the most unique and serves as a compass to guide you through AIM's following steps.

If you have questions, concerns, or insights as you work through the activities in this guide, we would be happy to help. Simply send your messages to hetal@sopact.com or unmesh@sopact.com

Look out for new resources at SoPact (https://www.sopact.com)

## Impact Perspectives

Learn about major trends in social impact management, topics in social impact framework, social impact reporting and data management in mission-driven organizations.

# VISION, MISSION, & GOALS

Vision, Mission, & Goals statements will serve as a guide in all future impact-defining activities. These are the statements you turn to when you get stuck. It is important to make sure that these statements are always pertinent to your organization.

## i. Vision Statement

Start with the Vision statement. Close your eyes and imagine that your organization is successful beyond your wildest dreams. What does that world look like? The Vision statement paints a picture of the ideal world your organization is working towards.

## ii. Mission Statement

Once the Vision statement is defined, you are ready to tackle the Mission statement, which answers for how your organization is working towards that Vision. If the Vision statement paints a picture of the future your organization works toward, the Mission statement is a clear definition of your organization's activities.

## iii. Goals

Goals are a series of milestones that your organization is working towards through your Mission to achieve the Vision statement you've crafted.

## REALITY CHECK: Not Just for your 'About Us' page.

These statements are not just nice looking statements on your website, but serious and useful tools. In fact, they will serve as reference points in subsequent steps.

# VISION, MISSION, & GOALS: EXAMPLES

Here are examples of well-curated Vision, Mission, and Goals by the Grameen Bank. The Bank was founded in 1983 by Dr. Muhamad Yunus to address poverty by providing banking services and access to credit for the poor. The following Vision and Mission were taken from the 2014 Annual Report.

## i. Vision Statement

"Banking for the poor"

More examples of Vision Statements

## ii. Mission Statement

"By providing comprehensive financial services, empowering the poor to realize their potential and break out of the vicious cycle of poverty."

More examples of Mission Statements

The following list of goals are examples of what the Bank's goals could be, but are not official goals of the Bank.

## iii. Goals

Goal: Bank Head Quarters in an accessible neighborhood of Dhaka

Goal: All Bengalis have the opportunity to access formal credit

Goal: Develop a model that can be customized for new regions and countries

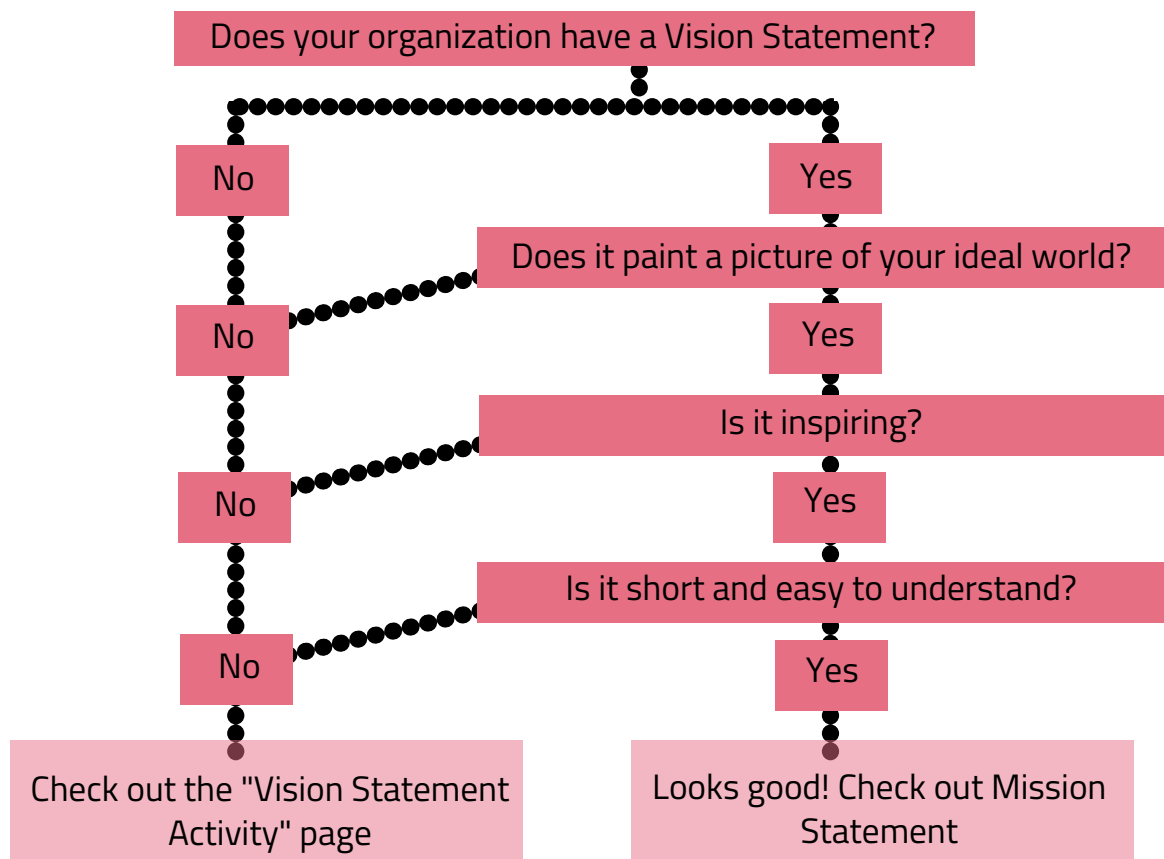Goal: Promote concept of Social Business worldwide

# i. VISION STATEMENT

A Vision Statement is the cornerstone of an organization. It is the vision of the world that would exist if your organization's efforts were 100 percent successful.

## Your Vision Statement is a powerful tool to draw people in. It should...

- be short, concise and, therefore, easy to understand
- be visual and paint a picture of your organization's idea of a perfect world
- be inspiring and positive - a rallying cry people want to be a part of
- be constant. A Vision Statement is enduring and is unlikely to change

**Use the question test below to determine if your Vision Statement needs revision:**

Does your organization have a Vision Statement?

No

Yes

Does it paint a picture of your ideal world?

No

Yes

Is it inspiring?

No

Yes

Is it short and easy to understand?

No

Yes

Check out the "Vision Statement Activity" page

Looks good! Check out Mission Statement

# i. VISION STATEMENT ACTIVITY

This activity maps out the four steps your organization can take to create an enduring Vision Statement. Each step is designed to take place on different days.

| | |
|---|---|
| STAFF | As many as possible. |
| MATERIALS | Whiteboard, paper, post-it notes, etc. |
| TIME | 30 - 45 minutes per step |
| OUTCOME | An inspiring Vision Statement that paints a picture of the idyllic world your organization seeks to create. |

## Step One | Brainstorm
Be sure to involve key stakeholders. What is the vision for the organization? Be sure the Statements you come up with follow the guidelines on the previous page.

## Step Two | Pick the Top 3
Aggregate the suggested Vision statements from the Brainstorming session and narrow them down to three.

## Step Three | Test
Ask people you know to read each option then ask, "What does it communicate to you?" ● "Do you feel like it's something you want to be a part of?" ● "Does it trigger any negative reactions?"

## Step Four | Final Selection
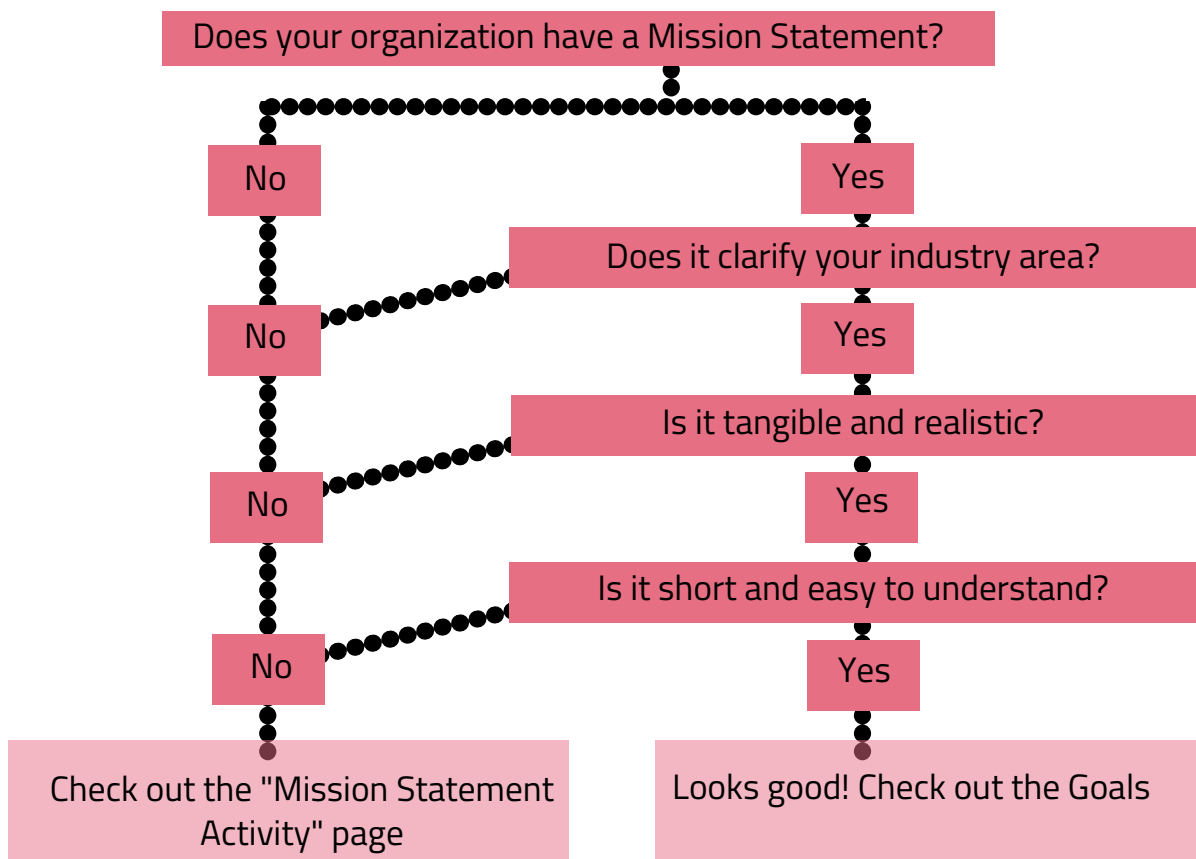Review findings and choose a Vision Statement.

# ii. MISSION STATEMENT

A Mission statement is the 'how.' How your organization contributes to achieving the VISION you just outlined - the industry in which you work (for example, healthcare services). If your industry of work changes, then your mission will need to reflect that modification. Like your vision statement, it should be clear, concise, and to the point.

## Your Mission Statement identifies the industry in which you work. It should...

- be short, concise and, therefore, easy to understand
- clearly define your organization's industry (path/approach)
- be consistent with the Vision Statement

**Use the question test below to determine if your Mission Statement needs revision:**

Does your organization have a Mission Statement?

No | Yes

No | Does it clarify your industry area?

No | Yes

No | Is it tangible and realistic?

No | Yes

No | Is it short and easy to understand?

No | Yes

Check out the "Mission Statement Activity" page | Looks good! Check out the Goals

# ii. MISSION STATEMENT ACTIVITY

This activity maps out the four steps your organization can take to create a clear and unifying Mission Statement. Each step is designed to take place on different days.

| | |
|---|---|
| STAFF | Staff representing various departments including strategy and program implementation. |
| MATERIALS | Whiteboard, paper, post-it notes, etc. |
| TIME | 30 - 45 minutes per step |
| OUTCOME | A focused Mission that is representative of the industry in which your organization's activities operate within. |

## Step One | Scope
Identify the scope of your organization's industry that you work in (i.e. banking, education, disaster relief, etc.). Next, identify who/what your organization is serving (i.e. students, environment, immigrants, faith communities, etc.). This should include the geographical location of your beneficiaries/operations.

## Step Two | Brainstorm
Once the scope is clearly defined, begin to shape a clear and concise statement. Come up with three potential variations.

## Step Three | Test
Take the three options and run it by a representative sample, if not the entire staff. Together, select the Mission Statement.

## Step Four | Final Selection
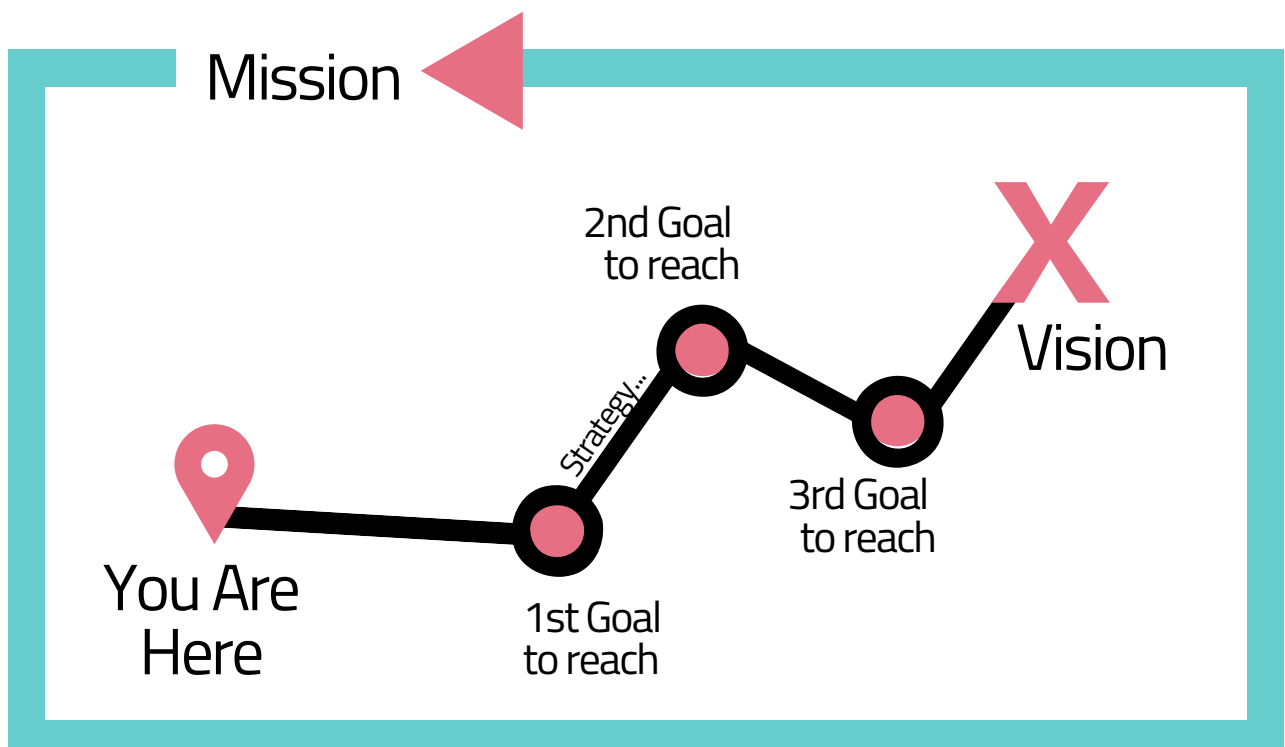Review findings and choose a Mission Statement.

# iii. GOALS

When goals are clear and easy to understand, they are powerful tools that align every area and every individual within your organization towards a common Vision. Familiarity and understanding of the big picture empowers individuals within the organization to recognize the relevance of their work to the organization's goal. This serves as a source of motivation for individuals and also enables the organization to achieve positive impact.

## Your Goals unite the efforts of your organization. They should be S.M.A.R.T....

- Specific: define What, Why, and How
- Measurable: with a way to know if the goal has been achieved or not
- Achievable: though challenging, goals should be realistic
- Relevant: pertinent to your Vision and Mission
- Time-Bound: a sequence of chronological achievements, Goals are linked to specific timelines

## METAPHORICAL MAP OF VISION, MISSION, & GOALS

Mission

2nd Goal
to reach

X

Vision

Strategy...

You Are
Here

3rd Goal
to reach

1st Goal
to reach

# iii. GOALS ACTIVITY

This activity maps out the four steps your organization can take to create Goals that are easy to understand.

| | |
|---|---|
| STAFF | Representatives from your organization's various departments (i.e. leadership, programs, etc.). |
| MATERIALS | Whiteboard, paper, post-it notes, etc. |
| TIME | 30 - 45 minutes per Step |
| OUTCOME | A focused Mission that is representative of the industry in which your organization operations. |

## Step One | Strategy
Agree upon the current strategy. How are you going to go about your Mission in order to achieve the Vision?

## Step Two | Milestones
Lay out a roadmap for your strategy. What are some of the milestones that your organization can work towards together?

## Step Three | Clean-Up
Clean-up your milestones so that they are clear and concise. Aim for three goals, but depending on the complexity of your programs, you may have more.

# PROGRAM STRUCTURE

The 'Program Structure' refers to your organization's internal hierarchy of activities and impact efforts. The two-layer structure includes your programs (or initiatives) in layer one and the associated goals of those programs in the second layer.

## Programs

Programs refer to your organization's focus areas.

If your organization is broad in scope, your 'Programs' might be "Higher Education," "Health and Wellness," "Financial Inclusion," "Organizational Capacity Building," etc.

If your organization has a narrow scope, maybe you work with at-risk youth for college and career readiness, then break it down a step further. What are the different ways you achieve this? Maybe your programs include "Testing," and "Internships," and so on.

## Outcomes

Outcomes are the intended results for each program.

## REAL TALK: Not as Easy as it Sounds.

This concept sounds simple. Do not be fooled. Many organizations have gotten stumped by this section. Don't be alarmed if you find yourself in a similar situation. Glance back at your Vision, Mission, and Goals for inspiration if you do get stuck. For example, a community organization that funds local nonprofits across a wide spectrum of issue areas kept trying to fit its programs in categories like "Education," but kept ending up with way too many programs. They revisited their Mission statement and realized the important factor of their work is in capacity building of their community nonprofits. Problem solved.

# PROGRAM STRUCTURE ACTIVITY

This activity maps out your organization's program structure. All you need to do is grab some post-it notes or some paper, and follow the structure below.

| | |
|---|---|
| STAFF | Staff who are well acquainted with programs. |
| MATERIALS | Whiteboard, paper, post-it notes, etc. |
| TIME | 30 - 45 minutes per step |
| OUTCOME | A focused Mission that is representative of the industry in which your organization operates. |

Put your organization's name at the top, next list your programs and then finish it up with the outcomes of each program.
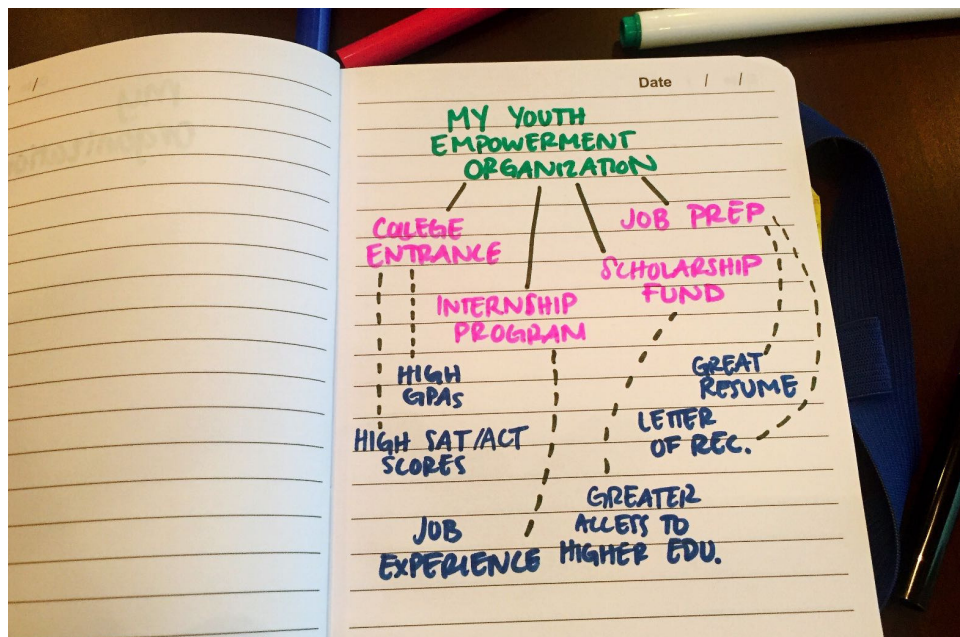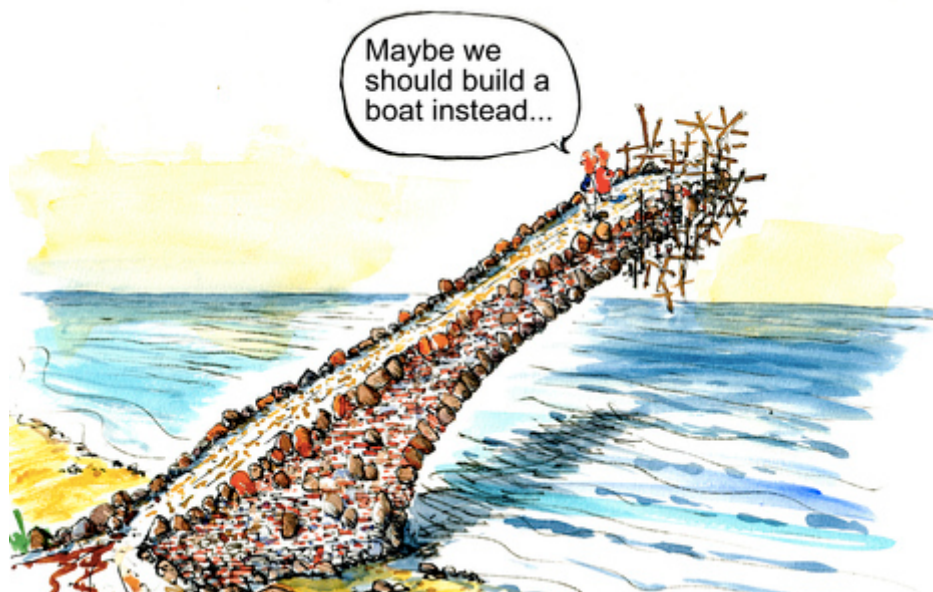
# THEORY OF CHANGE

The Theory of Change (ToC) documents the change (impact) that you are seeking for both accountability and internal awareness of potential organizational challenges. In the ToC, the primary challenges indicated are your underlying assumptions.

An assumption (no matter how strongly you believe it to be true) is, after all, an assumption. Woven into the fabric of every Theory of Change is at least one grand assumption. For example, that providing free shoes improves the overall quality of life. As we saw with Toms Shoes, an assumption that is not thoroughly explored can lead to negative consequences. In this case, in-kind donations replaced local markets and hurt the economy of the community served. A thoughtful and intentional Theory of Change can help mitigate negative unintended consequences like this.

Essentially, the intent of this exercise is to understand the long term goal, and map backward in a way that irons through details. By doing this, you might uncover gaps or potentially at-risk assumptions.
You can learn more about Theory of Change here.

# THEORY OF CHANGE

When researching Theory of Change you will quickly realize how complex it is. Mapping out the long-term path you intend to take in such a way that you surface the hidden assumptions is no easy task. There are hundreds of different examples of ToCs to build from along with thoughtfully constructed templates.

Some organizations get creative in how they visualize their ToC. However your approach, it's important to remember that the ToC serves an important purpose: to help keep you from making harmful mistakes. Additionally, the outcomes and outputs outlined in the document will be useful in 'Volume Two: Metrics.' To help keep it organized and clear so that you can refer later, we've developed a template that you will find in the activity portion of this section.

## Each step builds on the last

You might have noticed, but each step is designed to inform the next. Skipping steps might lead to inconsistencies in the impact measurement strategy you are designing.

Theory of Change

Program Structure

Vision, Mission, Goals

# THEORY OF CHANGE ACTIVITY

The following Theory of Change (ToC) template is designed to build upon the program structure you just created. The outcomes and outputs option will also be important later for identifying important metrics.

STAFF          Staff who are well acquainted with programs.

MATERIALS      Whiteboard, paper, post-it notes, etc.

TIME           30 - 45 minutes per step

OUTCOME        A focused ToC that shows the logical connection between your program inputs, activities, outputs, and outcomes your organization seeks to create.

1   Revisit your Program Structure. Order your programs from most to least important. You will begin with those that are at the top of the list.

2   Take the first program and fill it into box #1 in the following ToC template.

3   Choose one of the program's listed outcomes and fill it into box #2.

4   Fill out each of the boxes as they are numbered.

NOTE: The number of outputs varies depending on the program. Cover the most important outputs and try to not get too bogged down in details.

# THEORY OF CHANGE ACTIVITY

Go ahead and familiarize yourself with the terms you will see in the Theory of Change template.

## Programs
Programs refer to your organization's focus areas. You already outlined your programs in the previous section, Program Structure.

## Outcomes
Outcomes are the intended humanitarian impact results for each program. You already outlined and organized your outcomes by their affiliated program in the previous section.

## Outputs
Outputs outline who is affected and what is produced. Outputs are necessary for achieving a given outcome. Think of them sort of as indicators that the outcome is on track to being achieved.

## Activities
What activities need to take place in order for each output to happen?

## Inputs
Inputs refer to the resources or investments needed to ensure that the activities take place.
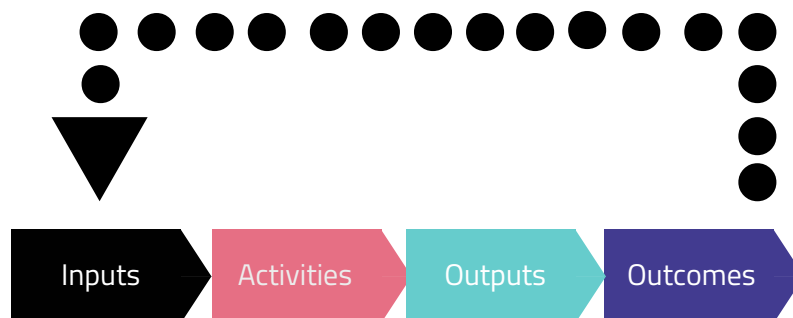
# THEORY OF CHANGE TEMPLATE

This ToC template was created by SoPact and Asia Pacific Social Impact Center as a hybrid of other ToC templates both parties have used in the past. It is designed for simplicity while maintaining the complexity of the ToC purpose of outlining the empirical basis of any social intervention.

### 1a. Program

### 1b. Outcome

### 1c. Why is this Outcome important to your Vision?

### 1d. How does this Outcome fulfill your Mission?

### 2a. Output One

### 2c. Activities

### 2e. Inputs

### 2b. Why will this output create the outcome (box 1b)?

### 2d. Why are these activities needed for output one?

### 2f. Why are these inputs needed for the activities?

## 3a. Output Two

## 3c. Activities

## 3e. Inputs

## 3b. Why will this output create the outcome (box 1b)?

## 3d. Why are these activities needed for output two?

## 3f. Why are these inputs needed for the activities?

## 4a. Output Three

## 4c. Activities

## 4e. Inputs

## 4b. Why will this output create the outcome (box 1b)?

## 4d. Why are these activities needed for output three?

## 4f. Why are these inputs needed for the activities?

## 5a. Output Four

## 5c. Activities

## 5e. Inputs

## 5b. Why will this output create the outcome (box 1b)?

## 5d. Why are these activities needed for output four?

## 5f. Why are these inputs needed for the activities?

# MANAGING CHANGE

The world we are moving into is one that is not accepting the notion that all good efforts lead to good impact. Although this new ideology challenges our organizations, efforts, and projects, it brings with it accountability, transparency, and reform. If we are prepared, we can be a part of the shaping of this new era. Before moving forward, be sure to gain the trust and backing of your stakeholders. Be sure that there is collective organizational intention to take the activities in this eBook seriously. You will need to work together – from the Executive Director to the program coordinators to the interns to the Board.

Fair warning, once you have completed your new impact measurement strategy and you are ready to implement it in your organization, you might find some resistance from your colleagues. This is natural; people have a natural fear of change. Breaking the status quo brings uncertainty and anxiety.

Before you embark on this journey to improve your impact measurement strategy, know that it will require change...in your organization's mindset, in your operations, maybe even in your tools and technology. But if you succeed to engage your organization in this journey, the results will be amazing.

## REAL TALK: Not as Easy as it Sounds.

If your organization is small, onboarding an intern to facilitate the project might be a good idea. It is important to know that this position is one of facilitation and your staff's presence and time will still be required. If your organization is a bit larger, hiring a consultant can bring the credibility you need to face the perspectives around the table. Your staff's presence will still be required, but the process will be tracked, well-documented, and well-communicated to all involved.

# MANAGING CHANGE

Here are some tips to achieve the level of involvement that you require in order for your organization to succeed.

INVOLVE KEY STAKEHOLDERS
Invite key stakeholders to be part of the preparation, especially those affected by or driving the changes, i.e. leadership, program managers, etc.

COMMUNICATE INTENT
Communicate your intent to implement or improve the impact measurement strategy. In the beginning, this might be done through information sessions open to anyone interested in learning more about the new impact measurement process. Remember that people are motivated by the outcome. Be sure to expose the need for change to the whole organization and clearly describe how the change will benefit each area of the organization.

BREAK IT DOWN
Don't try to boil the ocean – start small. A small change is easier to control and observe the results. As you go along, small wins will motivate staff. In this case, you might go by Volumes: The Actionable Impact Management framework is already broken into 4 steps (Groundwork; Metrics; Data; Impact Report) that might serve as a reasonable guideline for your organization's bite-sized chunks.

IDENTIFY KEY AGENTS OF CHANGE
Identify the early adopters within the different departments – the individuals that seem most excited about the potential change and who want to be part of it. Next, provide those individuals with training so that they are well-versed in the objectives and goals along with the methodologies and tools that will be used to apply them. Throughout the process, these are the individuals you will want to keep informed and updated. They will help keep everyone else updated as well. Be sure to listen to their feedback. All this feedback will help you make small adjustments to make the change smoother.

REINFORCEMENT
Recognize those making the effort to adopt the new process. Show how the benefits are starting to happen. Communicate how this new impact strategy is helping your organization, either in terms of efficiency, effectiveness or any other element that is relevant to your organization's culture. Try to adapt the implementation process around the organic inclinations of those involved.

# GLOSSARY

### IMPACT

The intended and unintended long-term consequences (both positive and negative) of a program. It can be difficult to ascertain the how much of this systemic impact is attributable to one program since several other programs in and out of your organization can contribute to the same impact in positive and negative ways. An example of an impact would be reduced child mortality rates.

> EXAMPLE: In the case of a Safe Water project, an increase in the number of households using treated water would directly impact on fewer cases of people suffering from diarrhea, meaning that there will be a reduced number of lost man-hours. This has a direct impact on poverty reduction. Also, the number of children suffering from diarrhea may reduce, meaning that the cases of child deaths are reduced.

### METRIC

A defined system or standard of measurement to track progress of change by your organization. In the impact space there are standard metrics and custom metrics. Standards are written by research and evaluation organizations and generally exist around focus areas or organization type. Custom metrics are created by an organization and are designed around their use case.

### BENCHMARK DATA

Data that is used to compare your program to other settings. This could be similar interventions in different places, or to the population at large (e.g. wanting to bring educational attainment of a minority population up to the national average)

### BASELINE DATA

Data that is collected  at the beginning of a project to establish the current status of a population before an intervention is rolled out. Without a baseline, it's not possible to know what the impact of the intervention is!

# GLOSSARY

## THEORY OF CHANGE

A map defines long-term impact a program seeks to deliver the logical relationship between inputs, activities, outputs, outcomes and impact. This is created by working backward from the desired impact to identify necessary preconditions. A good theory of change should be plausible, feasible and testable.

Theory of Change includes Inputs, Activities, Outputs, and Outcomes:

### INPUT

What we use in the project to implement it. In any project, inputs would include things like human resource (personnel), financial capital, machinery such a vehicles, and equipment such as whiteboards and computers. Inputs ensure that it is possible to deliver the intended results of a project.

EXAMPLE: In a Safer Water project, inputs might include filters, project members, time, etc.

### ACTIVITY

Actions associated with delivering project goals. In other words, they are what the personnel/employees do in order to achieve the aims of the project.

EXAMPLE: In a Safer Water project, activities might be workshops to educate families on the importance of using boiled or filtered water.

### OUTPUT

The direct results of a project in the short term. An easy way to think about outputs is to quantify the project activities that have a direct link on the project goal.

EXAMPLE: For example, project outputs in a Safer Water project would be that families in a village are educated on water safety and supplied with filters.

### OUTCOME

The intended medium term consequences of a program. Outcomes are the second level of results associated with a project and refers to usually relate to the project goal or aim.

EXAMPLE: For example, in a safe water project, an outcome would be "the percentage of children suffering from diarrhea."

# THANK YOU

This concludes Actionable Impact Management (AIM) 'Volume One: Groundwork'

We look forward to the release of 'Volume Two: Metrics' and hope you do as well. Do you have feedback on Volume One? We'd love to hear it. Go ahead and connect with us to let us know any feedbacks. Alternately visit us online.

# Metrics

## A Framework for Social Impact Measurement

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SECOND OF A 4-PART SERIES OF EBOOKS,
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VOLUME TWO: METRICS
IS DESIGNED TO HELP YOUR ORGANIZATION DEFINE THE
METRICS TO MEASURE WHAT MATTERS

# AUTHORS



## SoPact
## Silicon Valley Social Enterprise

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# ACTIONABLE IMPACT
# MANAGEMENT

## AN INTRODUCTION
## TO THE FRAMEWORK

## What it is

Actionable Impact Management (AIM) is an open source framework for defining an internal organizational method for establishing an enduring data-oriented/outcome-oriented impact measurement process. AIM's objective is to outline a roadmap for your organization to follow in the hopes to reach a point where you are able to more accurately and effectively communicate your impact to multiple stakeholders.

By Impact Management, we refer to an organization's ability to define an impact framework that is practical and enduring and translate insights through effective communication on impact via your website, reports, content generation, etc.

This guide is designed for functionality and accessibility of content, complete with instruction and activities to work through the process. In this volume, we convert the groundwork developed in AIM Volume One into sets of carefully crafted and well-defined metrics that measure what matters. By the end of this Volume, we will understand of the data needs behind our metrics. In 'Volume Three: Data' we will build solid plan for data collection, compilation, and analysis.

## What it isn't

Actionable Impact Management is not intended for grant management or the monitoring of activities. This guide is not a deep-dive into the theoretical considerations of the processes but will reference additional resources for those that want to gain more substantial insights into any of the topic areas. Furthermore, AIM is not intended to be a one-size-fits-all practice.

# ACTIONABLE IMPACT
# MANAGEMENT
## FRAMEWORK STEPS

# VOL 2 | METRICS
# IN THIS VOLUME

# METRICS

This is the second guidebook in the Actionable Impact Management 4-part series. The first, 'Volume One: Groundwork' covers the necessary pre-work to lay the infrastructure that your metrics selection process will rely on.

It's easy to measure the wrong things or unintentionally misrepresent the data. This Volume of Actionable Impact Management is designed to help your organization identify meaningful metrics and make sure they are well-defined so they might be accurate and enduring.

By measuring what matters, your organization is able to gain credibility with funders, donors, and public. Not to mention, the insights you will gather.

What we call a **metrics set** is a grouping of metrics organized around a specific program or activity. We recommend working your way through the entire process of defining one metrics set before moving on to the next.

If you have questions, concerns, insights as you work through the activities in this guide, we can stay in touch. Simply send your messages here.

NOTE: All activity worksheets from Volume Two: Metrics can be found compiled at the end of this guidebook as well as available online in SoPact Library.

# MEASURE WHAT MATTERS

What we measure is important because it shapes our approach to our intervention. If you are asked to report on number of education centers opened vs. the results on the students and community, you may prioritize the quantity of centers over the quality of experience. Likewise, we don't want to collect a ton of data just for the sake of it, we want to collect the right data. In this guidebook, we will place our central focus on your mission (according to the Theory of Change you completed in Volume One: Groundwork) while considering the following factors:

1. The effectiveness of your intervention
2. The audience
3. The balance between quantitative and qualitative analysis
4. Outcome-driven (results-oriented) analysis
5. Financial and logistical capacity to collect the data

## FACTORS TO CONSIDER

### 1. The Effectiveness of your Intervention

Look back to your Theory of Change, your Vision, Mission, and Goals from Volume One: Groundwork. Are you doing what you claim to do? Your metrics should guide your intervention decisions and monitor the meaningful change resulting from them.

### 2. The Audience

There are two types of audiences to consider when selecting your metrics:

Internal Audience: Your impact story as told by the data is a powerful motivating force for your staff, and volunteers.

External Audience: Your beneficiaries, your funders, your board, the public - effective impact communication to these audiences looks different and serves different purposes.

By keeping these audiences in mind as we select our metrics, we will be better able to communicate our impact to them later. This is especially true of funders, when possible we want to communicate to them what we have found valuable to measure.

# MEASURE WHAT MATTERS

### 3. Quantitative and Qualitative

The numbers are important, but in order to have a comprehensive and compelling depiction of your impact, you need to supplement it with stories, quotes, photos, drawings - anything that accurately portrays your impact story. This mix of qualitative and quantitative data creates a more comprehensive picture and helps build credibility.

### 4. Outcome-Driven Analysis

Outcomes are the results of your intervention. By grading your organization on its results rather than activities and inputs, you have a better understanding of the  impact you are having. The activity on the following pages helps to ensure that you have an outcome-heavy metrics set. Keep in mind that your vision is a long-term one, and your true impact will be years in the making, so it may take time for collecting outcome data to fully understand whether and how you are moving things toward that vision.

### 5. Capacity for Measurement

When considering how realistic it is to capture data for any given metric, think about the following questions:

- Does your current infrastructure support data collection for this metric?
- If not, would the necessary changes be feasible?
- Is the collection of these data cost-effective?
- How important is this metric to your mission or funders?

## REAL TALK: True Impact is Systemic Change

The systemic change sought by your Vision is a group effort. Collected over time, your outcomes are a key piece of a larger puzzle. They are needed to see systemic change happening over time.

# MEASURE WHAT MATTERS ACTIVITY

This activity calls for you to move possible metric-by-metric to help you thoughtfully decide which metrics are worth measuring and which ones are not worth measuring at this time.

| | |
|---|---|
| STAFF | Programs and Grants Departments |
| MATERIALS | One Measure What Matters worksheet per metric and your Theory of Change from Volume One |
| TIME | 3 to 10 minutes per metric |
| OUTCOME | A list of meaningful draft metrics that are realistic to measure |

## Step One | Pick a Program
Go back to Volume One. Observe how you organized your organization's activities by 'program' - this is how you will organize your metrics sets. Select the Program you will start with and find its Theory of Change.

## Step Two | Pick out the Outcomes and Outputs
Highlight the most important outcomes and outputs on your Theory of Change. Of those highlighted, go outcome by outcome, output by output, writing a draft metric for each.

## Step Three | Measure What Matters Worksheet
Write these drafts down on the following page (Measure What Matters) and go down the list of questions in order to determine if the metric is worth keeping.

## Step Four | Final Selection
Keep all of the metrics that you have deemed important to measure. Read over them to see if there are any gaps.

# MEASURE WHAT MATTERS WORKSHEET

**Draft Metric Definition**   Refer back to the Outcomes and Outputs in your Theory of Change

**Mission Critical?**
Aligned to your Mission Statement?

**Realistic to Measure?**
Will this metric be logistically manageable?
Is it cost-effective?

**Already being Measured?**
Are you already collecting data for this metric?
Or is this data already collected and accessible?

**Reason for Measuring**
Is this for your own measurement needs or to report to an external entity?

**Outcome Metric?**
Is this metric measuring the results of your intervention (rather than activities)?

**Worth Measuring?**
Based on the information above, is there a strong case for this metric?

| **YES** | **NO** |
|---------|--------|
| Keep Going | Hold onto the metric for future or find a proxy metric |

**Notes**

# STANDARD METRICS ALIGNMENT

## What are Standard Metrics?

Standard metrics are sets of metrics created by organizations (typically nonprofits and international agencies) that are dedicated to improving the effectiveness of measurement in the social sector.

## Why Align to a Standard?

A good metric is challenging to write. There are two key reasons to align to existing standards:

### Reason One

You're communicating your impact to a particular audience (within a particular field).
Think of standards as languages for communicating with particular audiences (including your funding source(s)). The following page outlines some of the languages, but for example, if you need to communicate your impact to impact investors, 80 percent are likely to use IRIS metrics. There are lots of other languages as well: nonprofit languages, sustainability languages, environment languages, women's empowerment languages, etc.

### Reason Two

You want to learn the best practices for writing metrics. Extensive research and development has already been completed. Even if you end up tweaking the standard to fit your needs, there are lessons you can learn from the standards catalogues.

# STANDARD METRICS ALIGNMENT

## Adapting Standards

While standard metrics are carefully worded by impact thought leaders, there is no one-size-fits-all to impact measurement. It might be the case that you identify a metric that is pertinent (aligned to one of your draft metrics), but with a few alterations, could better meet your needs. By tweaking that metric (documenting exactly how you've altered the base  metric in your records), you can benefit from the research done to craft that careful wording, and help it better reflect the outcome of your intervention.

## Custom Metrics

Unfortunately, you will find that there are very few outcome (results) metrics amongst the standards. It might be the case that you are unable to find any standards that reflect your draft outcome metrics. In that case, you can still benefit from the standards by replicating the language when crafting your own metric.

### READ THIS IF YOU'RE NOT ALIGNING TO STANDARDS

Even if you aren't going to align to standards, don't skip over the activity portion of this section. We will use this exercise to iterate and finalize our draft metrics.

# STANDARD METRICS ALIGNMENT

## UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS

The United Nations (UN) Sustainable Development Goals (SDGs), also referred to as The 2030 Agenda for Sustainable Development, is a set of 17 Global Goals, 169 associated targets, and 230 individual indicators. This international collaboration between 193 UN Member States and global organizations and agencies is outlined in the UN Resolution A/RES/70/1 established in September 2015.

The SDGs are seen as a step towards international collective impact efforts, focusing and guiding the interventions of humanitarian efforts around the globe.

### "We don't have plan B because there is no planet B." - United Nations Secretary-General, Ban Ki-moon

# STANDARD METRICS ALIGNMENT

## Aligning to the SDGs

Many in the impact space are orienting to the United Nations (UN) Sustainable Development Goals (SDGs) with the hope that convergence will make everyone better able to have a positive impact by explicitly working toward the same goals. What's more, the SDGs are the result of years of international negotiation, so while they might be refined over time, the SDGs are here to stay. So it is worth looking towards aligning with them sooner rather than later.

Of course, with such a global reach, there are some contextual considerations. While a global vision is important, context and the unique nature of your operations and environment cannot be compromised. It is important to take the granular details of your particular operating atmosphere into consideration when crafting outcome metrics.

So while it is useful for you to align with the targets set by the United Nations, understand the how your operations' contribute to those targets. This means that you will need metrics that reflect your organization's immediate outcomes and outputs within the appropriate scope and scale, and a clear line of sight from those organizational outcomes to the larger SDG target. If the SDG indicators don't suffice, you can also borrow metrics from other standards to complement them.

Overall, the most important thing is to make sure that the metrics and indicators that you choose maintain the integrity of your results and reflect your context. If you find that you are working on a more local need, such as the use of arts and culture to foster children's development, then don't try to force yourself to align to the Sustainable Development Goals. The language of the SDGs is a great platform to match impact investors with the causes they believe in, but not aligning to the SDGs doesn't make your organization's work less relevant. You can always find funders eager to support your cause.

# STANDARD METRICS ALIGNMENT

## SECTOR-SPECIFIC TOOLS FOR ORGANIZATIONAL ALIGNMENT



### General

Global Value Toolkit is an EU-funded research projects addressing the measurement and management of business impacts on global sustainable development. Their catalog offers more than 200 frameworks and measurement resources aligned to SDGs.

### Sustainability

Global Reporting Initiative (GRI) is dedicated to sustainability reporting, transforming it from a niche practice to one now adopted by a growing majority of organizations.

"GRI's Sustainability Reporting Standards are foundational to this success. With thousands of reporters in over 90 countries, GRI provides the world's most widely used standards on sustainability reporting and disclosure, enabling businesses, governments, civil society and citizens to make better decisions based on information that matters. In fact, 92% of the world's largest 250 corporations report on their sustainability performance."

GRI recently linked its sustainability indicators to the SDG indicators in this SDG Compass. This guide allows those reporting on sustainability to participate in the global dialogue around the Sustainable Development Goals.

# STANDARD METRICS ALIGNMENT

## SECTOR-SPECIFIC TOOLS FOR ORGANIZATIONAL ALIGNMENT

### Impact Investing*

Impact investments are investments made in companies, organizations, and funds with the intention to generate social and environmental impact alongside a financial return.

theglin.org

Toniic is the global action community for impact investors.

Their alignment strategy for the SDGs is a hybrid approach that fuses the Goals outlined in the SDGs with IRIS indicators.

Toniic's hybrid approach is followed in their new T100 Project a tool for impact investors to converge around the SDGs while adhering to the context of their unique activities, environment, and investment requirements. IRIS is widely used amongst the impact investing community. The decision to link IRIS indicators with SDG Goals and Targets was to join two compatible worlds: global impact convergence & impact investment.

# STANDARD METRICS ALIGNMENT: DIRECTORY

## Global Goals and International Aid

United Nations Sustainable Development Goals (SDGs)
The World Bank
Impact Builder by Bond

## Nonprofits

Guidestar

## Community Foundations

Robin Hood Foundation

## Impact Investors

IRIS

## Sustainability

Global Reporting Initiative (GRI)
UNEP Sustainability Metrics
SASB

# STANDARD METRICS ALIGNMENT: DIRECTORY

## Poverty

Progress out of Poverty Index (PPI)

## Health and Wellness

HP2020
IRIS + CHMI
Access to Medicines Index

## Education

OECD

## Water, Sanitation, and Hygiene (WASH)

USAID
UNICEF

## Food Security

Access to Nutrition Index

# STANDARD METRICS ALIGNMENT ACTIVITY

It's time to finalize your metrics definitions.

| | |
|---|---|
| STAFF | Programs and Grants Departments |
| MATERIALS | One Measure What Matters worksheet per metric and your Theory of Change from Volume One |
| TIME | 3 to 10 minutes per metric |
| OUTCOME | A list of meaningful draft metrics that are realistic to measure |

## Step One | List your Draft Metrics
On the left-hand side of the worksheet, list out the draft metrics that you have decided are worth measuring. Keep them organized by program.

## Step Two | Search
Search the catalogue of the standard you wish to align with, and identify a standard metric that works for this draft metric. Once one is chosen, write down which standard it is and the number or reference given to it. If you can't find a standard, search other catalogues or create a custom metric.

## Step Three | Tweak (Standards & Custom)
Iterate the language to make sure it meets the unique needs of your organization's context and scope.

# STANDARD METRICS ALIGNMENT WORKSHEET

**Program:**

| Draft Metric Definition | Standard Metric Definition OR Custom Metric Final Definition |
|---|---|
| If Standard, list which | |
| If Standard, list which | |
| If Standard, list which | |
| If Standard, list which | |

# RECAP

You created a draft list of metrics that are outcome/output-oriented

You finalized your list of metrics by adopting (or tweaking) standards when needed, or by creating your own custom metrics.

Next, you will build out the supporting material for your final list of metrics.

And finally, you will map out each metric's data journey – from collection through analysis.

# SECURING ENDURING METRICS

For this section, let's put ourselves in the shoes of those who will be reporting the data. Given only the metrics and the information we have defined so far, what might their experience reporting the data be like? Might they be left with questions that could keep them from reporting accurately?

Which currency should we report in?
When you ask for total number of students,
does that include our daycare program?

When each metric is clear with the well-defined supporting material, we've built a sturdy impact measurement structure that will be more accurate and enduring. We can minimize human error by building out the support material of our metrics - making the data we receive more accurate. We can also secure an enduring measurement process when it is well-documented and well-defined. Even if your organization experiences a high turnover of employees, clear and detailed documentation keeps your process less prone to unnecessary adaptations.

Some of the examples of the Standards for the reference which helps in understanding the metrics.

# SECURING ENDURING METRICS: BASELINE

Baseline Metrics are the 'before' intervention measurement, in year zero of your program. This is what you will compare your metrics to as time goes on to identify the change that has occurred. You may want to be able to compare with areas outside of your intervention, such as national or regional averages. This is called 'benchmark data.' You might only have one metric that you want benchmark data for, or you may decide that it's needed for every metric.

## Here are some places you can go to find benchmark data:

### SOCIETAL DATA

The General Social Survey (GSS)
Since 1972, the General Social Survey (GSS) has provided politicians, policymakers, and scholars with a clear and unbiased perspective on what Americans think and feel about such issues as national spending priorities, crime and punishment, intergroup relations, and confidence in institutions.

### HOUSEHOLD COMMUNITY DATA

The Living Standards Measurement Study (LSMS)
The Living Standards Measurement Study (LSMS) is a household survey program focused on generating high-quality data, improving survey methods, and building capacity. The goal of the LSMS is to facilitate the use of household survey data for evidence-based policymaking.

# SECURING ENDURING METRICS: BASELINE

## HOUSEHOLD COMMUNITY DATA CONTINUED

### The Family Life Surveys (FLS)

The Family Life Surveys (FLS) are a set of detailed household and community surveys of developing countries conducted by the RAND Corporation, in collaboration with research institutions in the given countries. The currently available country surveys cover Malaysia (1976-77, 1988-89), Indonesia (1993, 1997, 2000), Guatemala (1995), and Bangladesh (1996).

### OECD Regional Statistics and Indicators

The OECD has developed two statistical databases to answer the increasing demand for statistical information at the regional level:

> The OECD Regional Database provides a unique set of comparable statistics and indicators on about 2 000 regions in 35 countries.  It currently encompasses yearly time series for around 40 indicators of demography, economic accounts, labour market, social and innovation themes in the OECD member countries and other economies.

> The OECD Metropolitan Database provides a set of economic, environmental, social, labour market and demographic estimated indicators on the 281 OECD metropolitan areas (functional urban areas with 500 000 or more inhabitants).

### National and International Statistical Agencies

OECD data are supplied by national statistical offices from member countries and presented in a comparative format. If you are seeking more detailed information or information on non-OECD countries, consult this list for an appropriate agency.

# SECURING ENDURING METRICS ACTIVITY

In this activity, you will document everything needed to supply the required metric

| | |
|---|---|
| STAFF | Programs and Grants Departments |
| MATERIALS | One Securing Enduring Metrics worksheet per metric |
| TIME | 10 minutes per metric |
| OUTCOME | Documentation of supporting information for each metric - so that no one is left with answers when reporting the data to you. |

## Step One | Pick a Metric

Go metric-by-metric and fill out the associated information. You will end up with one page per metric.

## Step Two | Repeat

Repeat until they're all filled out.
The idea is that you could send the completed worksheet to the person that will be reporting that metric and they will have a clear idea of the data you are expecting.

# SECURING ENDURING METRICS WORKSHEET

## Final Metric Definition

| | |
|---|---|
| **Program(s)** that this metric is associated with | |
| **Label** A shortened title for the metric (i.e. for excel spread sheets or for internal referencing.) | |
| **What standard metric is it (based on)?** Reference the original standard that this metric is based on - include a link when possible. | |
| **Data Type and Parameters** What data format would you like the metric reported in (number, text, percentage, etc.)? Are there any parameters (i.e. 0-100)? | |
| **Usage Guidelines** Directions for getting to the data - what is needed to collect the data you are asking for in this metric. This might be a formula, or a short instruction. | |
| **Sample Answer** A shortened title for the metric (i.e. for excel spread sheets or for internal referencing.) | |
| **Reporting Frequency** How often will you ask for the data on this metric? | |
| **Baseline Metric** What is the baseline indicator for this metric? If this is your first reporting year, this year BECOMES your baseline for future years. | |

# METRICS DATA PIPELINE

The Metrics Data Pipeline is the journey the data takes from when it is collected  on the ground through to when you communicate the data as impact. This section will look at the data behind each of our final metrics and map its journey through the reporting process. This will help familiarize us with the needs of each metric and the technology we might leverage to simplify the process.

This section is an introduction to our technology considerations. We will further explore technology's capacity for simplifying our process in Volume Three: Data. For now, let's focus on thinking of our metrics data like a relay race and identify the hand-off points. There are several phases that our data will pass through:

- Data Collection
- Data Compilation
- Data Analysis
- Learnings
- Data Visualization
- Communicating to stakeholders

## REAL TALK: Simplification is Key

Each phase (data collection - data compilation - data analysis) requires at least one tool seen on the next page. The more our tools overlap, the fewer tools we use and the easier the process becomes.

# METRICS DATA PIPELINE: DIRECTORY

## ▶ Data Collection Tools

### Forms
Impact Cloud: TurboMetrics
AirTable
Google Forms

### Surveys
Impact Cloud: TurboMetrics

## ▶ Data Compilation Tools

Impact Cloud: TurboMetrics
AirTable
Google Sheets
Excel
Salesforce

## ▶ Data Analysis Tools

### Data Visualization
Impact Cloud: TurboMetrics
Tableau

# METRICS DATA PIPELINE ACTIVITY

Let's discover the journey of each dataset as it travels from the field to your organization for impact communication. This activity will help you develop insight into the data management needs for each metric.

| | |
|---|---|
| STAFF | Programs & IT |
| MATERIALS | One Metrics Data Pipeline worksheet per metric. |
| TIME | 10 minutes per metric |
| OUTCOME | A logistical map of your data |

## Step One | Select a Metric
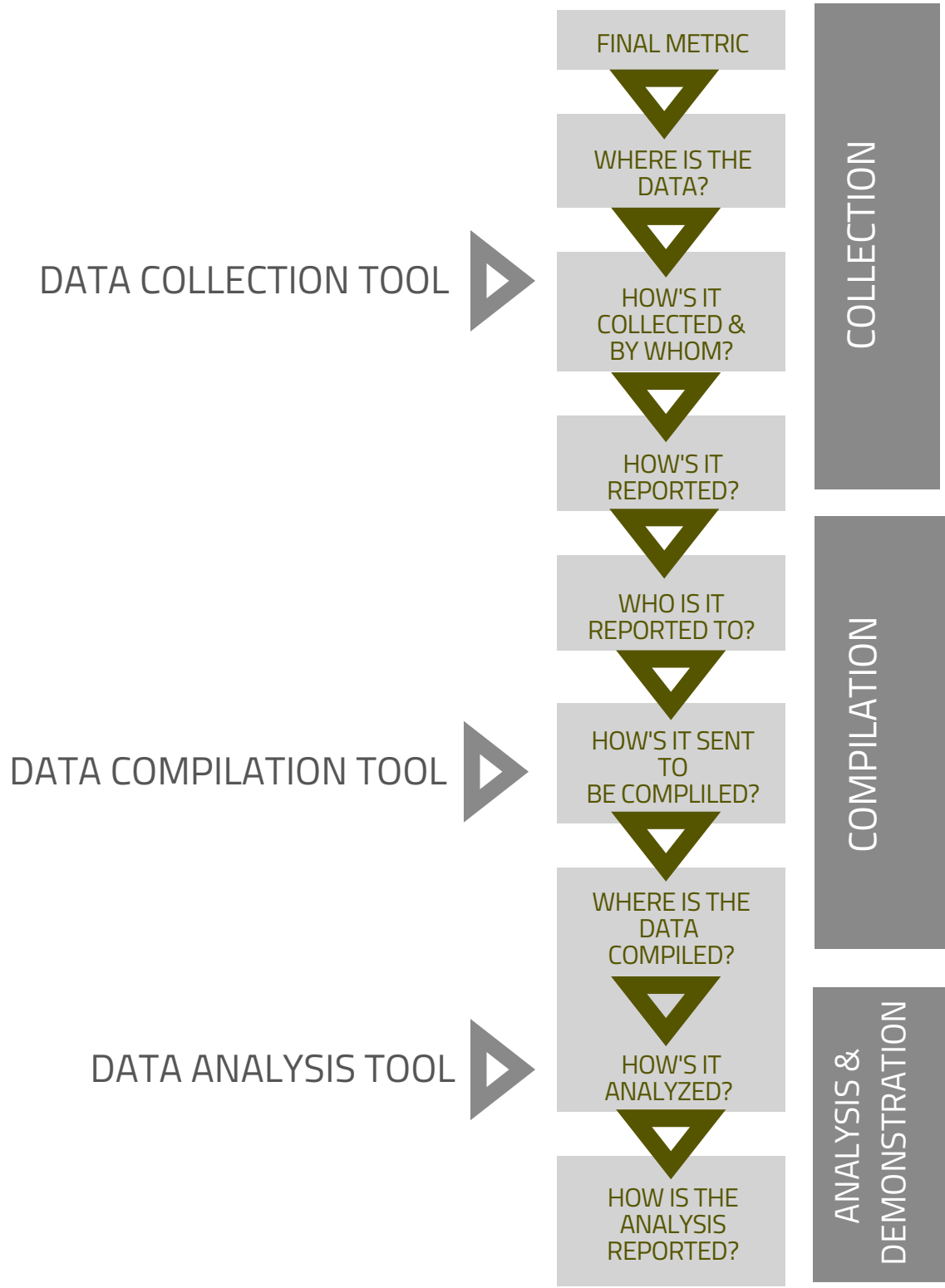Pick a program and move metric-by-metric.

## Step Two | Map it
Move down the list of considerations. Try to be specific.
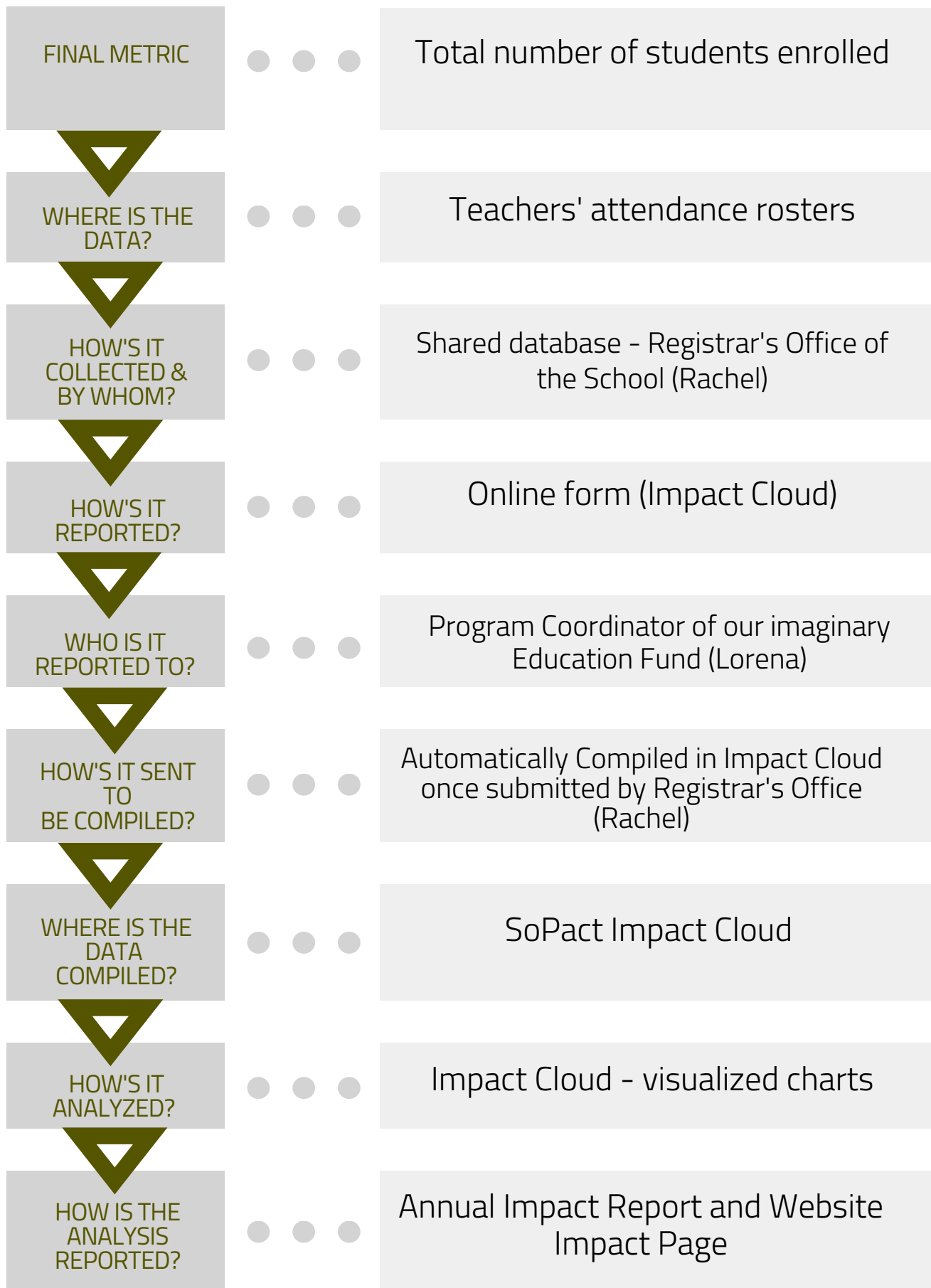
## Step Three | Repeat
As you repeat the process, consider ways that you could consolidate tools - or simplify the process overall.
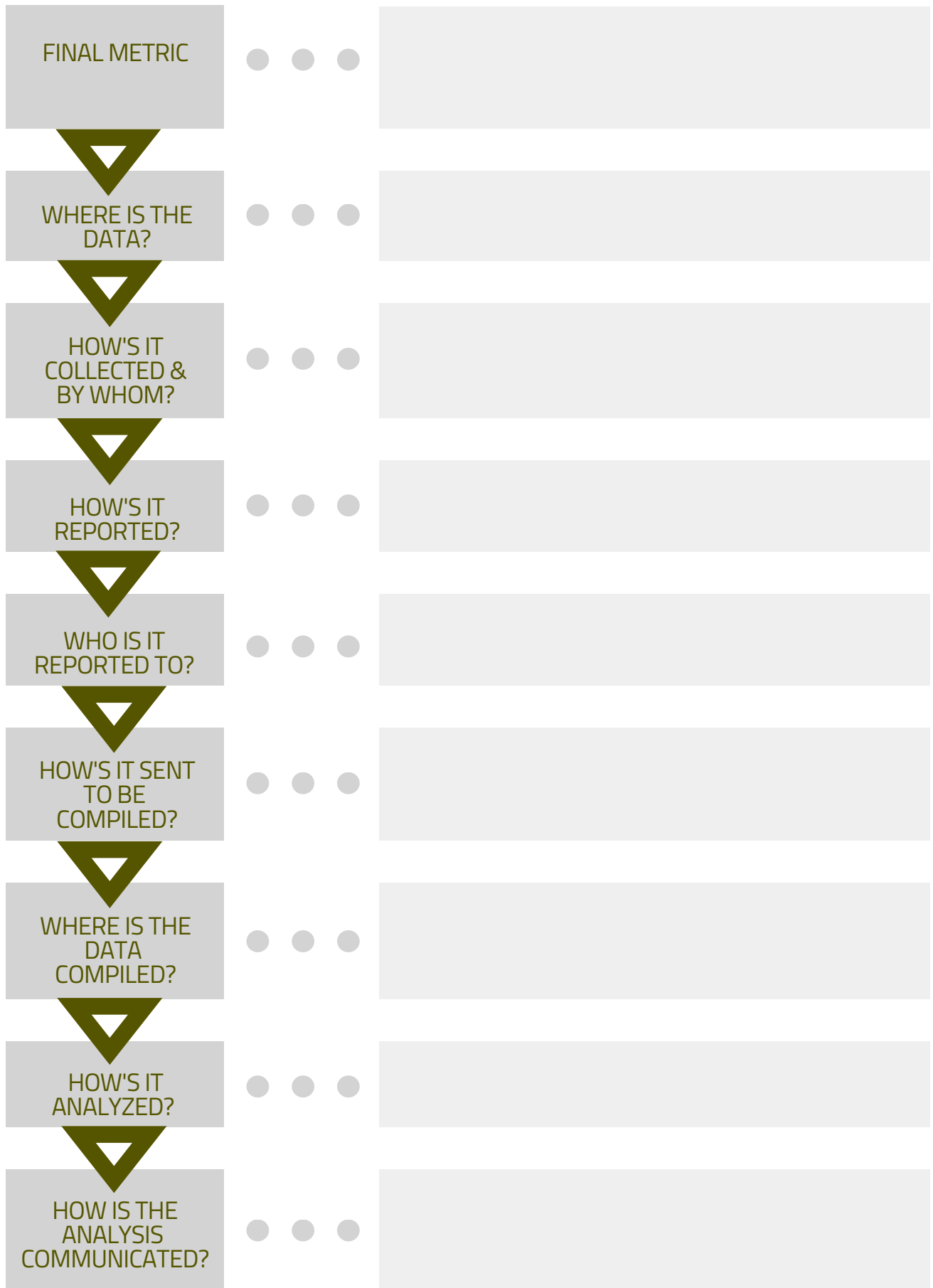
# METRICS DATA PIPELINE

FINAL METRIC

WHERE IS THE DATA?

DATA COLLECTION TOOL ▶ HOW'S IT COLLECTED & BY WHOM?

HOW'S IT REPORTED?

WHO IS IT REPORTED TO?

DATA COMPILATION TOOL ▶ HOW'S IT SENT TO BE COMPLILED?

WHERE IS THE DATA COMPILED?

DATA ANALYSIS TOOL ▶ HOW'S IT ANALYZED?

HOW IS THE ANALYSIS REPORTED?

COLLECTION

COMPILATION

ANALYSIS & DEMONSTRATION

# METRICS DATA PIPELINE

| | | |
|---|---|---|
| **FINAL METRIC** | • • • | Total number of students enrolled |
| **WHERE IS THE DATA?** | • • • | Teachers' attendance rosters |
| **HOW'S IT COLLECTED & BY WHOM?** | • • • | Shared database - Registrar's Office of the School (Rachel) |
| **HOW'S IT REPORTED?** | • • • | Online form (Impact Cloud) |
| **WHO IS IT REPORTED TO?** | • • • | Program Coordinator of our imaginary Education Fund (Lorena) |
| **HOW'S IT SENT TO BE COMPILED?** | • • • | Automatically Compiled in Impact Cloud once submitted by Registrar's Office (Rachel) |
| **WHERE IS THE DATA COMPILED?** | • • • | SoPact Impact Cloud |
| **HOW'S IT ANALYZED?** | • • • | Impact Cloud - visualized charts |
| **HOW IS THE ANALYSIS REPORTED?** | • • • | Annual Impact Report and Website Impact Page |

# METRICS DATA PIPELINE

**FINAL METRIC**

● ● ●

**WHERE IS THE DATA?**

● ● ●

**HOW'S IT COLLECTED & BY WHOM?**

● ● ●

**HOW'S IT REPORTED?**

● ● ●

**WHO IS IT REPORTED TO?**

● ● ●

**HOW'S IT SENT TO BE COMPILED?**

● ● ●

**WHERE IS THE DATA COMPILED?**

● ● ●

**HOW'S IT ANALYZED?**

● ● ●

**HOW IS THE ANALYSIS COMMUNICATED?**

● ● ●

# GLOSSARY

## IMPACT

The intended and unintended long-term consequences (both positive and negative) of a program. It can be difficult to ascertain the how much of this systemic impact is attributable to one program since several other programs in and out of your organization can contribute to the same impact in positive and negative ways. An example of an impact would be reduced child mortality rates.

> EXAMPLE: In the case of a Safe Water project, an increase in the number of households using treated water would directly impact on fewer cases of people suffering from diarrhea, meaning that there will be a reduced number of lost man-hours. This has a direct impact on poverty reduction. Also, the number of children suffering from diarrhea may reduce, meaning that the cases of child deaths are reduced.

## METRIC

A defined system or standard of measurement to track progress of change by your organization. In the impact space there are standard metrics and custom metrics. Standards are written by research and evaluation organizations and generally exist around focus areas or organization type. Custom metrics are created by an organization and are designed around their use case.

## BENCHMARK DATA

Data that is used to compare your program to other settings. This could be similar interventions in different places, or to the population at large (e.g. wanting to bring educational attainment of a minority population up to the national average)

## BASELINE DATA

Data that is collected  at the beginning of a project to establish the current status of a population before an intervention is rolled out. Without a baseline, it's not possible to know what the impact of the intervention is!

# GLOSSARY

## THEORY OF CHANGE

A map defines long-term impact a program seeks to deliver the logical relationship between inputs, activities, outputs, outcomes and impact. This is created by working backward from the desired impact to identify necessary preconditions. A good theory of change should be plausible, feasible and testable.

Theory of Change includes Inputs, Activities, Outputs, and Outcomes:

### INPUT

What we use in the project to implement it. In any project, inputs would include things like human resource (personnel), financial capital, machinery such a vehicles, and equipment such as whiteboards and computers. Inputs ensure that it is possible to deliver the intended results of a project.

> EXAMPLE: In a Safer Water project, inputs might include filters, project members, time, etc.

### ACTIVITY

Actions associated with delivering project goals. In other words, they are what the personnel/employees do in order to achieve the aims of the project.

> EXAMPLE: In a Safer Water project, activities might be workshops to educate families on the importance of using boiled or filtered water.

### OUTPUT

the direct results of a project in the short term. An easy way to think about outputs is to quantify the project activities that have a direct link on the project goal.

> EXAMPLE: For example, project outputs in a Safer Water project would be that families in a village are educated on water safety and supplied with filters.

### OUTCOME

the intended medium term consequences of a program. Outcomes are the second level of results associated with a project and refers to usually relate to the project goal or aim.

> EXAMPLE: For example, in a safe water project, an outcome would be "the percentage of children suffering from diarrhea."

# THANK YOU

This concludes Actionable Impact Management (AIM) 'Volume Two: "Metrics"

We look forward to the release of 'Volume Three: "DATA" and hope you do as well. Do you have feedback on Volume Two? We'd love to hear it. Go ahead and connect with us to let us know any feedbacks. Alternately visit us online.

# Chapter 3

# Data

## A Framework for Social Impact Measurement

ASIA PACIFIC
**SOCIAL IMPACT CENTRE**
MELBOURNE BUSINESS SCHOOL

sopact

**DR. KRZYSZTOF DEMBEK**
**DR. JODI YORK**
**RACHEL DODD**
**LORENA RODRÍGUEZ**
**UNMESH SHETH**

THIRD VOLUME IN A 4-PART SERIES OF GUIDEBOOKS,
ACTIONABLE IMPACT MANAGEMENT (AIM)
VOLUME THREE: DATA
IS DESIGNED TO HELP YOUR ORGANIZATION ENHANCE ITS
DATA CAPACITY

2018 RELEASE
SOPACT INC. AND THE UNIVERSITY OF MELBOURNE'S
ASIA PACIFIC SOCIAL IMPACT CENTRE

# AUTHORS



## SoPact
## Silicon Valley Social Enterprise

SoPact is a social enterprise in the San Francisco Bay area that strives to bring technical expertise to the social sector. SoPact brought its knowledge of accessible technology tools that support operations processes around impact data. Contributing team members include Rachel Dodd, Lorena Rodríguez, and Unmesh Sheth.

## Asia Pacific Social Impact Centre
## Melbourne Business School



The Asia Pacific Social Impact Centre (APSIC) is the University of Melbourne's hub for education, research, and action in the field of social impact. APSIC researchers Dr. Krzysztof Dembek and Dr. Jodi York co-authored this report and contributed their expertise of impact measurement process and best practice to this guidebook.

# ACTIONABLE IMPACT
# MANAGEMENT
## AN INTRODUCTION
## TO THE FRAMEWORK

## What it is

Actionable Impact Management (AIM) is an open source framework for defining an internal organizational method for establishing an enduring data-oriented/outcome-oriented impact measurement process. AIM's objective is to outline a roadmap for your organization to follow in the hopes to reach a point where you can accurately and effectively communicate your impact to multiple stakeholders.

By Impact Management, we refer to an organization's ability to define an impact framework that is practical and enduring and translate insights through communication on impact via your website, reporting, research content, etc.

This guide is designed for functionality and accessibility of content, complete with instruction and activities to work through the process. In this volume, your organization will discover how technology might be leveraged to collect, compile, analyze, and communicate reliable and credible data on the outcome-oriented metrics selected. By the end of the guidebook, you will have a data strategy that you are ready to implement.

This guidebook builds on AIM Volume One: Groundwork, as well as AIM Volume Two: Metrics.

## What it isn't

Actionable Impact Management is not intended for grant management or the monitoring of activities. This guide is not a deep-dive into the theoretical considerations of the processes but will reference additional resources for those that want to gain more substantial insights into any of the topic areas. Furthermore, AIM is not intended to be a one-size-fits-all practice.

# ACTIONABLE IMPACT
# MANAGEMENT
## FRAMEWORK STEPS

# VOL 3 | DATA
# IN THIS VOLUME
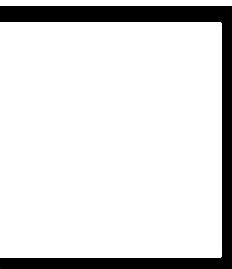
## DATA CAPACITY
OVERVIEW
ACTIVITY

## DATA TOOLS
OVERVIEW
ACTIVITY

## DATA STRATEGY
OVERVIEW
ACTIVITY

## WORKSHEETS & GLOSSARY

# DATA

This is the third guidebook in the Actionable Impact Management (AIM) 4-part series.

Volume One: Groundwork walks through the introspective work necessary for defining an impact framework.

Volume Two: Metrics covers the metrics selection process for your impact program assessment and impact measurement.

In Volume Three: Data your organization will discover how to leverage technology to collect, compile, analyze, and communicate reliable and credible data on the outcome-oriented metrics selected.



"In God we trust, all others must bring data."
W. Edwards Deming

(c) iStockphoto / Thinkstock
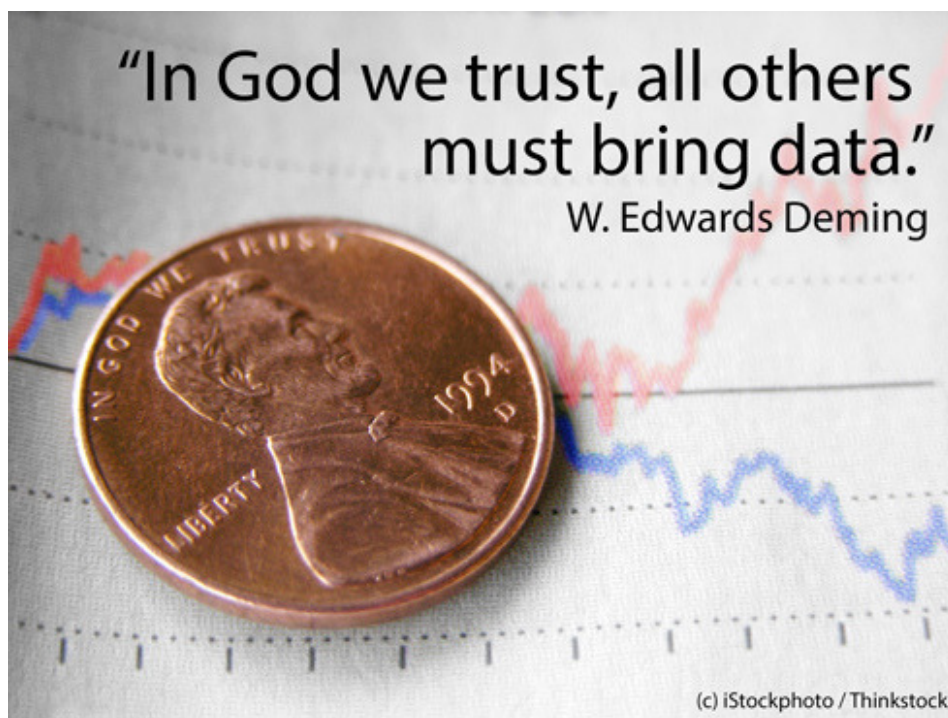
# DATA CAPACITY

Data capacity is an organization's ability to manage data. Tools for data capacity span across the four stages of impact measurement: Data Collection; Data Compilation; Data Analysis; and Data Communication. To fully understand your organization's data capacity across these four stages, you will need to:



**IDENTIFY THE NEED FOR DATA TOOLS** → **ANALYZE THE ORGANIZATION'S CURRENT TOOLS** → **INVOLVE THOSE WHO INTERACT WITH THE TOOLS** → **UNDERSTAND FINANCIAL REQUIREMENTS** → **ALIGN WITH THE ORGANIZATION'S REQUIREMENTS**
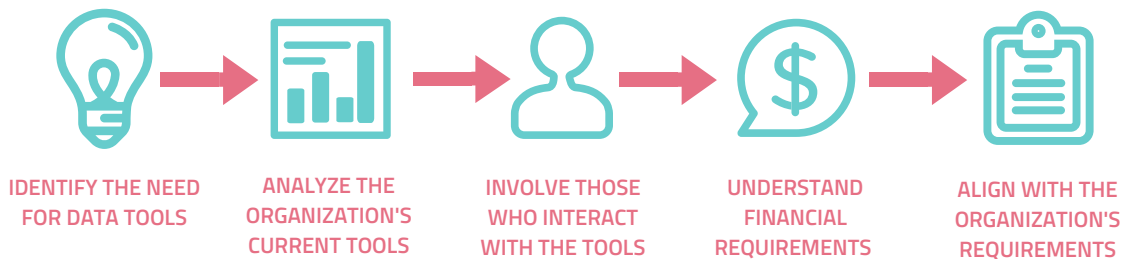
## Below are considerations for each of these steps:
### 1) Identify the need for tools

COLLECTION:
Does your organization collect field data (Primary Data) or summary data (Aggregate Data)?

Primary Data are collected on the ground and are granular at the client/beneficiary level. Primary data are observed or collected directly from the first-hand experience.

Track Clients: If your organization collects primary data, does it need to track individual constituents' progress and information over time? If you are not collecting primary data, this does not apply.

COMPILATION + ANALYSIS:
Aggregate Data are generated by compiling primary data to provide a data-driven summary evaluation of a program or an initiative.

Summary Evaluation: This applies to all organizations collecting any form of impact data. Summary data evaluation is the understanding and visualization of data at multiple hierarchical levels. As an example, student attendance data begin at the classroom level and then compiled at the school, district, state, and country level.

# DATA CAPACITY

Does your organization face impact reporting requirements around external reporting or internal reporting? Clearly define those requirements.

## 2) Analyze the organization's current tools

Is your organization already using tools for data collection, compilation, analysis, or communication? List them and get an understanding of the organization's feedback for these tools. Are they well accepted by the people who are using them?

## 3) Involve those people who interact with the tools

It will be important to collect input from those that use the tools. Especially if it is discovered that new tools may need to be adopted.

## 4) Understand financial requirements for data tools

With your list of current tools, add how much you are currently spending on those tools. Define the organization's budgetary requirements. What is the organization's budget for tools? And is that range currently being met?

## 5) Align with the impact assessment goals

How much data are required to reach your desired impact assessment goals? Data capacity of an organization has to align with that data requirement.

The following activity pages structure organization's walkthrough of these and other considerations.

# DATA CAPACITY ACTIVITY

To define the parameters of the organization's data capacity, check the boxes that apply:

## NEED FOR DATA TOOLS

☐ THE ORGANIZATION COLLECTS PRIMARY DATA
*SEE PAGE 6 OF AIM VOLUME THREE FOR DEFINITION

☐ THE ORGANIZATION TRACKS CLIENTS/BENEFICIARIES

☐ THE ORGANIZATION COLLECTS AGGREGATE DATA
*SEE PAGE 6 OF AIM VOLUME THREE FOR DEFINITION

☐ THE ORGANIZATION HAS EXTERNAL REPORTING REQUIREMENTS. THEY INCLUDE:

☐ THE ORGANIZATION HAS A BUDGET FOR DATA CAPACITY TOOLS. THE TOTAL BUDGET:$

## THE ORGANIZATION CURRENTLY USES TOOLS FOR:

☐ DATA COLLECTION: (INCLUDE TOOL NAME)

☐ DATA COMPILATION: (INCLUDE TOOL NAME)

☐ DATA ANALYSIS: (INCLUDE TOOL NAME)

☐ DATA COMMUNICATION: (INCLUDE TOOL NAME)

# DATA CAPACITY ACTIVITY

Go down the list and circle the boxes with the capacity level that best describes the organization:

| | | | | |
|---|---|---|---|---|
| **WHAT IS YOUR DATA CAPACITY?** | **TOOL COST RANGE PER MONTH** | $0 | $1 - 200 PER MONTH | $200 + PER MONTH |
| | **INTERNET ACCESS OF REPORTING PARTNERS** | NO INTERNET CONNECTIVITY | LIMITED INTERNET CONNECTIVITY | RELIABLE INTERNET CONNECTIVITY |
| | **STAFF TECHNICAL EXPERTISE** | NO TECHNICAL EXPERTISE | MODERATE TECHNICAL WORKING KNOWLEDGE | TECHNICAL EXPERTISE |
| **COLLECT:** HOW ARE THE DATA COLLECTED? | **DATA COLLECTION: PRIMARY DATA** | DON'T NEED IT | NEED IT | IMPORTANT |
| | **DATA COLLECTION: AGGREGATE DATA** | DON'T NEED IT | NEED IT | IMPORTANT |
| **COMPILE:** WHERE ARE THE DATA COMPILED? | **SUBMITTING DATA** | COLLECT FROM ONSITE STAFF &/OR 1-10 PARTNERS | COLLECT FROM STAFF ACROSS REGIONS &/OR 10-30 PARTNERS | COLLECT FROM STAFF ACROSS REGIONS &/OR 30+ PARTNERS |
| | **DATA STORAGE** | *LOW DATA STORAGE | *MEDIUM DATA STORAGE | *HIGH DATA STORAGE |
| **ANALYZE:** HOW ARE THE COMPILED DATA ANALYZED? | **DATA ANALYSIS: TRACK CLIENTS** | DON'T NEED IT | NEED IT | IMPORTANT |
| | **DATA ANALYSIS: SUMMARY EVALUATION** | DON'T NEED IT | NEED IT | IMPORTANT |
| **COMMUNICATE:** HOW IS THE ANALYSIS VISUALIZED? | **COMMUNICATE IMPACT: EXTERNAL REPORTING** | DON'T NEED IT | NEED IT | IMPORTANT |
| | **COMMUNICATE IMPACT: INTERNAL NETWORK** | SMALL BOARD/ STAFF (1-50) | MEDIUM BOARD/ STAFF (51-100) | LARGE BOARD/ STAFF (101 +) |
| | **COMMUNICATE IMPACT: PUBLIC** | LOW CAPACITY MARKETING STAFF | MEDIUM CAPACITY MARKETING STAFF | HIGH CAPACITY MARKETING STAFF |

*Data storage need differs from organization to organization

ACTIONABLE IMPACT MANAGEMENT | DATA | 09

# DATA TOOLS

There are four stages of data management for the impact management: COLLECT, COMPILE, ANALYZE, and COMMUNICATE.

Selecting fewer tools for them is efficient and effective. In other words, some tools overlap between the stages and by selecting those that do, you can minimize the number of tools used by your organization. Keep the process as simple as possible.

In the previous exercise, you mapped out some of your capacity requirements for various tool types. Refer back to the selections you made and look for their corresponding sections in the following chart. Remember to involve the users in the selection process as much as possible.

## Data Collection Tools

Device Magic

GoFormz

Nexticy

QuickTapSurvey

Fulcrum

Formitize

iFormBuilder

PushForms

Formhub

TrackVia

Magpi

Examples of tools for data collection depends on the type of data required to be collected.

Examine where data are coming from and how?

- Is it survey based? The survey can be paper-based or online form tools based. Examples of online form tools are GoFormz, Fulcrum, FormHub, Magpi, Impact Cloud, etc. See some highlighted features on next page.
- Is it online or offline? Developing countries may need offline data collection possibilities.
- Is it on-premises data collection? Data collected in office.
- Do you have a customized data management system? Large organizations and foundations often invest in a customized solution for data management.
- Do you have case management systems?

# DATA TOOLS

## Online Form Tools Features may Affect the Selection

| Tools | Highlighted feature |
|---|---|
| TrackVia | Building powerful apps that work anywhere |
| Device Magic | Pre-filled data in forms |
| Magpi | Mobile forms and automated messaging |
| GoFormz | Digitizing paper forms |
| Form Hub | Open source data collection -Free |
| Fulcrum | Geo location with custom maps |

**Disclaimer:** These are only a few examples of online data collection tools. They are not listed in any particular order of preference, pricing, or features.
Reference credit: 10 of the Best Apps for Gathering Data in the Field-Mathew Guay

Please keep in mind that data can come from online forms, offline forms, systems like Salesforce or Microsoft Azure, SMS, TTS-Text To Speech, Voice Based Apps from Twilio, Plivo, etc. You can compile the data manually, use integrations, or use systems which can collect data from all the sources and analyze to communicate.

To bring accuracy and capability avoid using many different tools, try to streamline the process of data management. While this practice is very common in corporate IT world, it can be effective in the social sector IT as well.

# DATA TOOLS

## Data Tools for Compilation & Analysis

As we see in data collection section, data from the field can come in many different ways. For example, non-profits often use paper, survey tools, mobile data collection, SMS data, custom apps on mobile, etc.

The compilation of data from the field can be particularly challenging due to the use of multiple tools. Using systems like paper, excel, google sheets, survey tools, CRM like Salesforce, etc. to collect data creates DATA ISLANDS meaning data silos or disaggregated data.

As an example, you are a nonprofit organization working with three partner agencies serving in the field. The first agency uses Salesforce to collect the field data, the second agency uses excel, and the third agency uses online form tool. Compiling data from these three agencies will be challenging and often has to be analyzed separately. There are many data compilation & analysis tools from simple excel and Tableau to complex software like Nvivo, QDA, etc.

Also within the same nonprofit organization, a beneficiary may have records in multiple systems, ranging from the Customer Relationship Management (CRM) system, service records, finance, and the support provided by other partner agencies. Each of these separate systems will have a slice of data on the beneficiary. By linking these sources of data, it's possible to get a better view of the overall beneficiary lifecycle.

## What can you do?

| Actionable Solutions. | PRO | CON |
|---|---|---|
| You can use a custom built or customized system (like Salesforce) to collect, compile, analyze, and communicating the data. | Proven | $$$ Complex |
| Have in-house IT staff to utilize commercially available tools in the market. | Accessible Continous | $$ Time |
| You can use customized technology solutions to integrate different applications/data systems like financial, operational, donation, and social impact. | Proven, Faster | $$$ Complex |
| You have to get consultants to interpret the data year after year. | Experience | $$ |
| Platforms like SoPact Impact Cloud can also seamlessly help in collecting, compiling, analyzing, and communicating the data. | $ Easy Impact Insight | NEW |

# DATA TOOLS ACTIVITY

Refer back to the Data Capacity Activity, consider the tools in the boxes that you previously circled as a starting point for data tool comparisons.

| | | | | |
|---|---|---|---|---|
| **COLLECT:**<br>HOW ARE THE DATA COLLECTED? | **DATA COLLECTION: PRIMARY DATA** | PAPER<br>FORMHUB<br>GOFORMZ<br>SURVEY MONKEY | IMPACT CLOUD<br>MAGPI<br>FORMHUB | IMPACT CLOUD<br>MAGPI<br>FULCRUM |
| | **DATA COLLECTION: AGGREGATE DATA** | AIRTABLE<br>EXCEL<br>GOOGLE FORMS | IMPACT CLOUD<br>AIRTABLE<br>FORM ASSEMBLY | IMPACT CLOUD<br>FORM ASSEMBLY |
| **COMPILE:**<br>WHERE ARE THE DATA COMPILED? | **DATA COMPILATION** | DEPENDS ON DATA COLLECTION TOOL | DEPENDS ON DATA COLLECTION TOOL | DEPENDS ON DATA COLLECTION TOOL |
| | **TOOLS EXAMPLES** | AIRTABLE<br>EXCEL | IMPACT CLOUD<br>AIRTABLE<br>SALESFORCE | IMPACT CLOUD<br>SALESFORCE |
| **ANALYZE:**<br>HOW ARE THE COMPILED DATA ANALYZED? | **DATA ANALYSIS: TRACK CLIENTS** | AIRTABLE<br>EXCEL | IMPACT CLOUD<br>HUD'S HMIS | IMPACT CLOUD<br>HUD'S HMIS |
| | **DATA ANALYSIS: SUMMARY EVALUATION** | AIRTABLE<br>EXCEL | IMPACT CLOUD<br>TABLEAU | IMPACT CLOUD<br>TABLEAU |
| **COMMUNICATE:**<br>HOW IS THE ANALYSIS VISUALIZED? | **COMMUNICATE IMPACT: EXTERNAL REPORTING** | CANVA: PRODUCTION | IMPACT CLOUD<br>FLUXX<br>BLACKBAUD | IMPACT CLOUD<br>FLUXX<br>BLACKBAUD<br>CUSTOM INTEGRATION |
| | **COMMUNICATE IMPACT: INTERNAL NETWORK** | CANVA: PRODUCTION<br>EXCEL<br>SILK.IO<br>PLOT.LY | IMPACT CLOUD<br>TABLEAU<br>SALESFORCE DASHBOARDS | IMPACT CLOUD<br>TABLEAU<br>SALESFORCE DASHBOARDS |
| | **COMMUNICATE IMPACT: PUBLIC** | AIRTABLE<br>CANVA<br>INFOGRAM<br>EXCEL | IMPACT CLOUD<br>TABLEAU<br>INSTANT MAGAZINE | IMPACT CLOUD<br>TABLEAU<br>INSTANT MAGAZINE |

# DATA STRATEGY

This next activity will have you take your selected tools and map out the data journey. Be sure to take note of who is responsible for each section of the four-step journey through impact data COLLECTION, COMPILATION, ANALYSIS, and COMMUNICATION.

You have already started thinking about some methods for your organization's impact communication and the next guidebook, Volume Four: Communication, deals exclusively with building out your communication strategy.

## COLLECTION BEST PRACTICES

In order to collect the data, the organization must first know where the data will be coming from. Familiarize yourself with the metrics and their associated data requests. Flag any of the data points that might be challenging.

## COMPILATION BEST PRACTICES

Will you want to store these data for the long term? Are you using multiple systems? Are there security risk considerations? Know what unique needs your data sets hold while you choose a tool for data storage. Track results in a single data store to reduce islands of data into different systems.

## ANALYSIS BEST PRACTICES

Planning for Analysis: Try to match related metrics by pairing qualitative metrics with quantitative metric counterparts in the analytical tool of your choice.

Analysis: Once you've collected data, it depends on how you've captured the data and where it's stored. Organize the data by the associations you previously identified. You have thought about what you need to find out, now analyze and visualize the results to take action on them. Some end-to-end data systems like SoPact Impact Cloud can help.

# DATA STRATEGY

## COMMUNICATION BEST PRACTICES

Impact communication is changing with time and moving increasingly online rather than paper. Do not just blindly follow the new trend.
Be guided by few simple points:

 1) Know where your audience is (Online or physical reporting)
 2) Know the level of understanding of your audience (i.e., they may be educated but not proficient in understanding health information; you have to simplify health information while communicating)

## LOOKING TO THE FUTURE

Building a body of strong impact evidence should become a priority for every organization if they want to remain innovative and capable of fulfilling their stakeholders' expectations.

We are witnessing a major shift in how funders view their role. Philanthropists are moving away from the charity model to the impact investment model where charity is giving away for a particular cause and investment is the outcome oriented. When it is seen as an investment, data transparency will be demanded. Many early adopters are already adjusting to this new approach that requires a readiness from all social sector organizations.

Both funder and beneficiary organizations should understand this trend and get ready to be a vibrant player in the Impact ecosystem. The alternative is obsolescence. Sometimes organizations find that this is a more involved process than expected. And if your organization values it, then VALUE it and put resources behind it.

MORE DETAIL IN VOLUME 4: "COMMUNICATION"

# DATA STRATEGY ACTIVITY

Once your tools are chosen, revisit your selected metrics and map out the data journey in this activity.

| COLLECT: HOW IS THE DATA COLLECTED? | | | COMPILE: WHERE IS THE DATA COMPILED? | | | ANALYZE: HOW IS THE COMPILED DATA ANALYZED? | | | COMMUNICATE: HOW IS THE ANALYSIS COMMUNICATED? | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Metric | Location of data | Data collection tool | How is the data sent? | | Data compilation tool | Tool to track clients | | Summary evaluation tool | External Reporting | Internal Reporting | Communicate impact to public |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

# GLOSSARY

We will use an example below to explain some of the glossary words.
EXAMPLE: A case of a Safe Water Project: An organization's Theory of Change is that increase in the number of households using treated water would directly impact on fewer cases of people suffering from diarrhea, meaning that there will be a reduced number of lost work-hours. This has a direct impact on poverty reduction. Also, the number of children suffering from diarrhea may reduce, meaning that the cases of child deaths are reduced.

## INPUT

What we use in the project to implement it. In any project, inputs would include things like a human resource (personnel), financial capital, machinery such a vehicles, and equipment such as whiteboards and computers. Inputs ensure that it is possible to deliver the intended results of a project.

- EXAMPLE: In a Safer Water project, inputs might include filters, project members, time, etc.

## ACTIVITY

Actions associated with delivering project goals. In other words, they are what the personnel/employees do in order to achieve the aims of the project.

- EXAMPLE: In a Safer Water project, activities might be workshops to educate families on the importance of using boiled or filtered water.

## OUTPUT

The direct results of a project in the short term. The output is a direct result of project activities that have a direct link to the project goal.

- EXAMPLE: In a Safe Water project, outputs would be a number of families in a village educated on water safety and supplied with filters.

## OUTCOME

The intended medium-term consequences of a program. Outcomes are the second level of results associated with a project and refer to usually relate to the project goal or aim.

- EXAMPLE: In a safe water project, an outcome would be the percentage change in the of children suffering from diarrhea.

# GLOSSARY

## IMPACT

The intended and unintended long-term consequences (both positive and negative) of a program. It can be difficult to ascertain the how much of this systemic impact is attributable to one program since several other programs in and out of your organization can contribute to the same impact in positive and negative ways.

- EXAMPLE: In a safe water project, an impact would be reduced child mortality and reduce poverty due to reduced loss of man-hours.

## THEORY OF CHANGE

A theory of change defines long-term impact a program seeks to deliver the logical relationship between inputs, activities, outputs, outcomes, and impact. This is created by working backward from the desired impact to identify necessary preconditions. A good theory of change should be plausible, feasible and testable. Theory of Change is an impact thesis of the organization. Theory of Change includes Inputs, Activities, Outputs, Outcomes and Impact.

## METRIC

A defined system or standard of measurement to track progress of change by your organization. In the impact space there are standard metrics and custom metrics. Standards are written by research and evaluation organizations and generally exist around focus areas or organization type. Custom metrics are created by an organization and are designed around their use case.

## PRIMARY DATA

Primary Data refers to any data collected in the field. It represents individual clients or beneficiaries and is much more granular than summary data.

## AGGREGATE DATA

Aggregate Data refers to individual data points that have been summarized together to depict the bigger picture at the program level.

# THANK YOU

This concludes Actionable Impact Management (AIM) 'Volume Three: Data'

We look forward to the release of 'Volume Four: Communication' and hope you do as well. Do you have feedback on Volume Three? We'd love to hear it. Go ahead and email us at hetal@sopact.com to let us know any feedbacks.

# Communication

## A Framework for Social Impact Demonstration

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sopact

**sopact**

FOURTH OF A 4-PART SERIES OF EBOOKS,
ACTIONABLE IMPACT MANAGEMENT (AIM) VOLUME FOUR: COMMUNICATION
IS DESIGNED TO HELP YOUR ORGANIZATION MAP OUT
THE FOUNDATIONAL ELEMENTS
OF YOUR IMPACT COMMUNICATION STRATEGY

2018 RELEASE
SOPACT INC. AND THE UNIVERSITY OF MELBOURNE'S
ASIA PACIFIC SOCIAL IMPACT CENTRE
Photo credit to Unsplash

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## Silicon Valley Social Enterprise

SoPact is a social enterprise in the San Francisco Bay area that strives to bring technical expertise to the social sector. SoPact brought its knowledge of accessible technology tools that support operations processes around impact data. Contributing team members include Unmesh Sheth.

**ASIA PACIFIC SOCIAL IMPACT CENTRE**
**MELBOURNE BUSINESS SCHOOL**

The Asia Pacific Social Impact Centre (APSIC) is the University of Melbourne's hub for education, research, and action in the field of social impact. APSIC researchers Dr. Krzysztof Dembek and Dr. Jodi York co-authored this report and contributed their expertise to impact management process and best practice to this guidebook.

# ACTIONABLE IMPACT MANAGEMENT

## AN INTRODUCTION
## TO THE FRAMEWORK

## What it is

Actionable Impact Management (AIM) is an open source framework for defining an internal organizational method for establishing an enduring data-oriented/outcome-oriented impact management process. AIM's objective is to outline a roadmap for your organization to follow in the hopes to reach a point where you are able to more accurately and effectively communicate your organization's impact to multiple stakeholders.

By Impact Management, we refer to an organization's ability to define an impact framework that is practical and enduring and translate insights into effective communication on impact via your website, reports, and other channels.

This guide is designed for functionality and accessibility of content, complete with instruction and activities to work through the process. In this volume, you will explore various mediums for communicating your impact. By the end of the guidebook, you will have a strategy for how to best communicate your impact to your stakeholders.

## What it isn't

What it is Actionable Impact Management is not intended for grant management or the monitoring of activities. This guide is not a deep-dive into the theoretical considerations of the processes but will reference additional resources for those that want to gain more substantial insights into any of the topic areas.

Furthermore, AIM is not intended to be a one-size-fits-all practice. This guidebook builds on AIM Volume One: Groundwork, AIM Volume Two: Metrics, and AIM Volume Three: Data.

# ACTIONABLE IMPACT MANAGEMENT

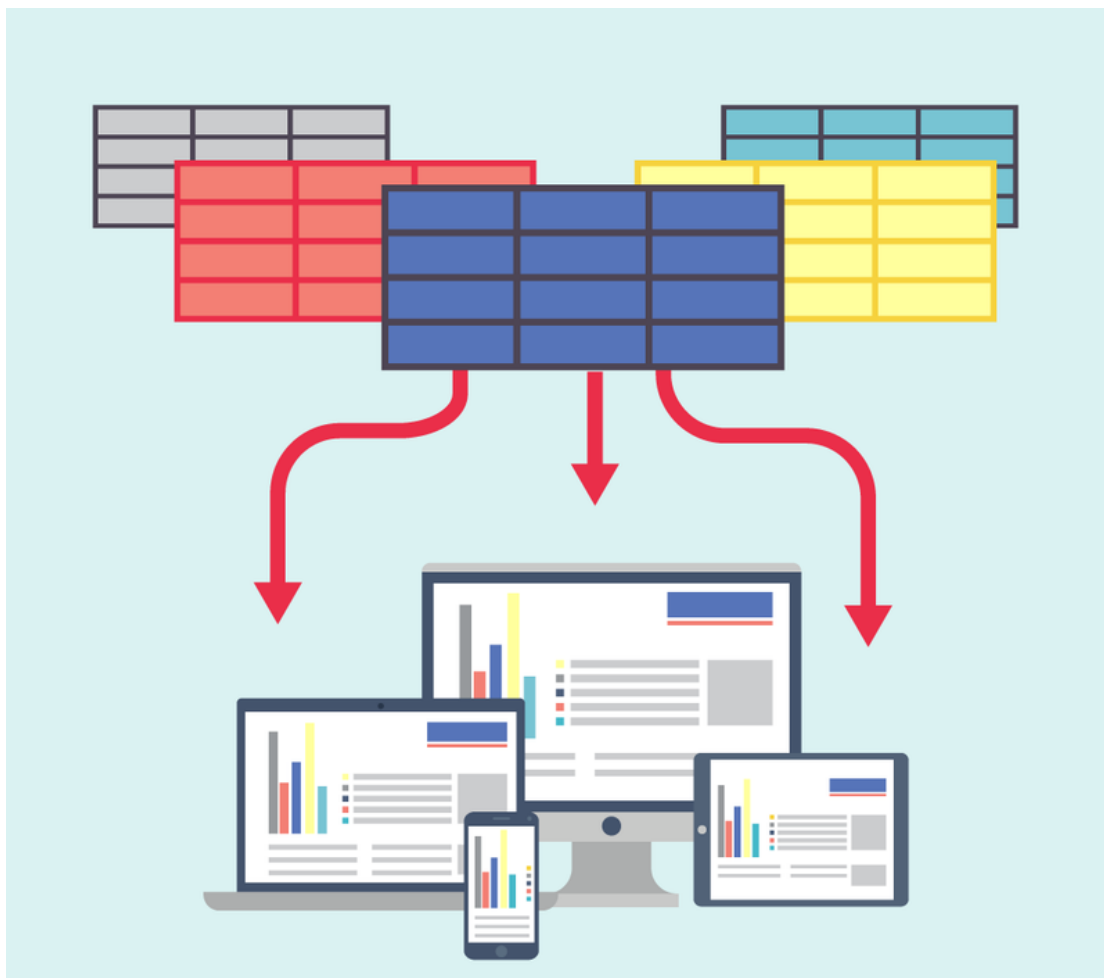# VOL 4 COMMUNICATION
## IN THIS VOLUME

# Vol 4 COMMUNICATION

This is the final guidebook in the Actionable Impact Management (AIM) 4-part series.

Volume One: Groundwork walks through the introspective work necessary for defining an impact framework.

Volume Two: Metrics covers the metrics selection process for your impact program assessment and impact measurement.

Volume Three: Data introduces organizations to how technology might be leveraged to collect reliable and credible data on the outcome-oriented metrics selected.

Volume Four: Communication connects back to the first volume to tie the final bow on Actionable Impact Management. In this final volume, we explore methods for communicating your organization's impact story with correct metrics, transparent data, and minimal tools.

# Vol 4 COMMUNICATION

## Connecting to Previous Volumes: Groundworks, Metrics, and Data

In this guidebook, we will close the loop and reconnect with what we have started in previous volumes: "Groundworks", "Metrics", and "Data". Refer back to your exercises from those volumes, as they are the raw material for impact evaluation and communication.

**VOLUME 1 Groundwork**: In Groundwork, you laid a path to impact management by setting out your organization's Vision, Mission, Goals, Program Structure, and Theory of Change.

**VOLUME 2 Metrics**: In Metrics, you used the information from the Groundwork exercises to select meaningful and well-defined metrics that will be accurate and enduring.
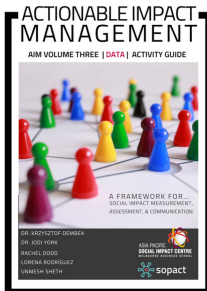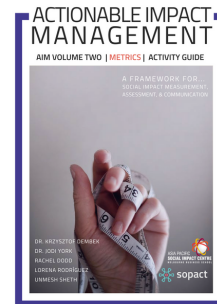
**VOLUME 3 Data**: In Data, you learned how your organization might leverage technology to collect reliable and credible data for the metrics selected in volume 2. **Download all the volumes from** Sopact.com

In this volume 4, you will learn what you should consider in communicating your organization's work, intended social impact, learnings from the field, and shortcomings. Review the checklist below to see if you have all the necessary elements to start communicating with your stakeholders about your impact.
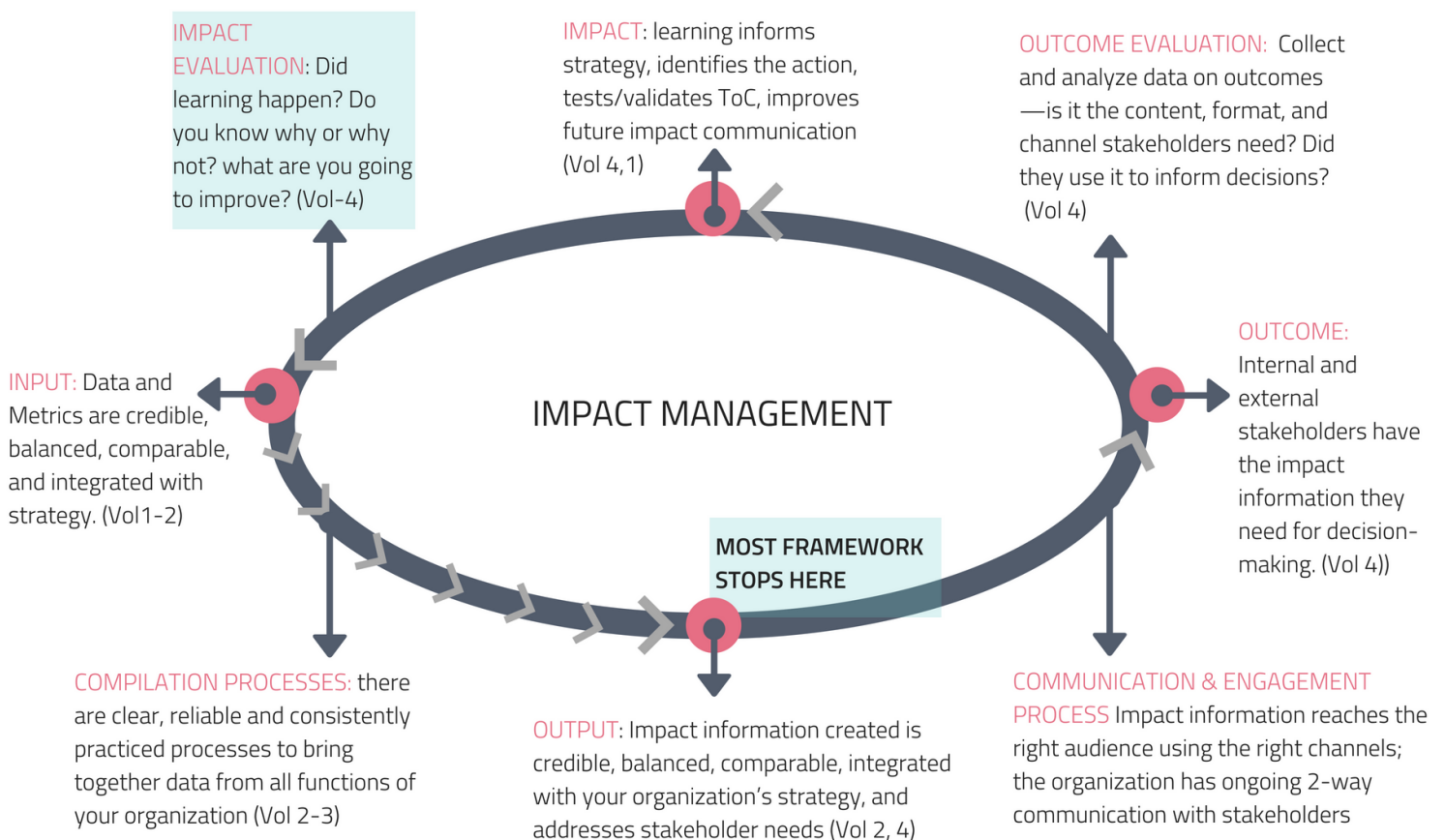
| ✓ | Vision |
| --- | --- |
| ✓ | Mission |
| ✓ | Goals (short-term and long-term) |
| ✓ | Program structure |
| ✓ | Activities, Input, Output, Outcome aligned with TOC |
| ✓ | Metrics |

# Vol 4 COMMUNICATION

## Connecting to Previous Volumes: Groundworks, Metrics, and Data

Sharing your organization's impact with stakeholders is not a linear process of gathering inputs and producing an output. The process of collecting, analyzing, and reporting information to internal and external stakeholders is critical to keeping your organization on track to deliver impact. As such, reporting and learning from your own data should be considered just as important as your organization's frontline work.

Effective impact reporting and management is a cyclical process that involves all parts of an organization and gathers information that informs future strategy.

IMPACT EVALUATION: Did learning happen? Do you know why or why not? what are you going to improve? (Vol-4)

IMPACT: learning informs strategy, identifies the action, tests/validates ToC, improves future impact communication (Vol 4,1)

OUTCOME EVALUATION: Collect and analyze data on outcomes —is it the content, format, and channel stakeholders need? Did they use it to inform decisions? (Vol 4)

INPUT: Data and Metrics are credible, balanced, comparable, and integrated with strategy. (Vol1-2)

IMPACT MANAGEMENT

OUTCOME: Internal and external stakeholders have the impact information they need for decision-making. (Vol 4))

MOST FRAMEWORK STOPS HERE

COMPILATION PROCESSES: there are clear, reliable and consistently practiced processes to bring together data from all functions of your organization (Vol 2-3)

OUTPUT: Impact information created is credible, balanced, comparable, integrated with your organization's strategy, and addresses stakeholder needs (Vol 2, 4)

COMMUNICATION & ENGAGEMENT PROCESS Impact information reaches the right audience using the right channels; the organization has ongoing 2-way communication with stakeholders

Adopted from "Sustainability Reporting to Improve Organizational Performance" published in Networks for Sustainability

# EVALUATION

Impact management is much more than producing reports—it is reviewing the evidence, learning, adapting and improving. Collecting data that does not get used in decision-making is of little use. Now is the time to step back and reflect on the big picture, and where you've gotten to since you started collecting data.

Evaluation is the opportunity to look at the available evidence, not just a 'gut feeling.' Ask whether you've achieved what you set out to do. Are you on track to where you're trying to reach? Has your recent approach been as effective and efficient as you'd like? If this is the first reporting period, that's okay. It is still useful!



**Use Evaluation Evidence Activity on the next page to explore how your organization is performing.**

These questions and their answers might be uncomfortable. That's okay. Some of this information is for your broader external stakeholder audience, some are just for your internal stakeholders like your board.

The point is to develop a clear, evidence-based picture of how your organization is performing, which will serve as your basis for decision-making.

In the next section, we will consider how to weave these facts together and communicate them with your stakeholders.

# Evaluating Evidence Activity

| | If YES, how can you demonstrate with evidence? | If NO, why not & what lessons did you learn? | How will you incorporate these lessons into future planning and action? | Compared to past periods, did you do better or worse? | What changes will you consider? |
|---|---|---|---|---|---|
| Thinking about the activities and outputs you had planned, did you achieve your goals or targets for the period? | | | | | |
| Thinking about the outcomes and impacts you aim to create, were you effective in delivering your mission? | | | | | |
| Are you closer to your organization's vision? | | | | | |

# Evaluating Evidence Activity

| | If YES, how can you demonstrate with evidence? | If NO, why not & what lessons did you learn? | How will you incorporate these lessons into future planning and action? | Compared to past periods, did you do better or worse? | What changes will you consider? |
|---|---|---|---|---|---|
| Is your strategy for getting to your vision working? | | | | | |
| Thinking about the relationship between your inputs and activities on one end, and your outcomes on the other. Have you been efficient in your creation of these outcomes? | | | | | |
| Thinking about the rate at which your organization is consuming resources (funding, volunteers, etc.), how sustainable is your organization? | | | | | |

# STORYTELLING APPROACH

## How to Approach an Impact Storytelling?

There is no single right way to report your impact, nor a single right way to tell a story. In the story of "Goldilocks and three bears", a girl breaks into a house. Consider the difference between telling this story as a police report and as a bedtime story and it will be clear that effective storytelling is about understanding the audience and connecting with them in a meaningful way. The tone, the format, and which information to highlight would be dramatically different.

Every organization must choose an approach to effective impact communication based on their AIM: audience, intent, and message. If you've followed the processes laid out in Actionable Impact Management, you should be well-equipped to do that. Refer back to the "Measure What Matters" section in Volume 2. Recall that you selected metrics to (1) demonstrate the effectiveness (or not) or your interventions, (2) resonate with the interests and frameworks of your key stakeholders, (3) incorporate both qualitative and quantitative measures to enable a compelling and data-driven impact story. Now it is time to draw those elements together into an effective impact report or other impact communication, such as a website.

## Audience: Internal and External Stakeholders

As stressed in earlier volumes, you need to consider the priorities of stakeholders, both internal (e.g., employees and board members) and external (e.g., investors, customers, and NGOs). It is critical to understand and involve your stakeholders in your impact management journey.

## Activity

List the stakeholders for your organization who would like to know more about your impact.

- What information do your stakeholders need?
- Do you understand what is important to them?
- Why is this information valuable to them?
- How are they going to use the information?
- How soon do they need this information?
- How can you engage your stakeholders?

# Stakeholder Activity

| Stakeholder category | Important topics | How will they use the information? | Level of detail desired |
|---|---|---|---|
| INTERNAL | | | |
| Leadership team | | | |
| Internal functions (HR, finance, operations etc) | | | |
| Employees | | | |
| Volunteers | | | |
| EXTERNAL | | | |
| Investors | | | |
| Customers | | | |
| Supply Chain Partners | | | |
| Regulators/Policymakers | | | |
| Local Community | | | |
| NGOs,Advocacy Groups | | | |

# STORYTELLING APPROACH

Your stakeholders, especially funders, may have specific expectations about what your reporting looks like and the language it uses. For instance, Corporate Social Responsibility, Environment & Sustainability, Impact Funds, Foundations, Nonprofit, Government Agency or Social Enterprise all have slightly different expectations. Refer back to AIM volume 2 for a more detailed review of these. You don't have to meet these expectations, but you should know what they are and be intentional when you depart from them.

## Intent

Whether it's a small blog post or an annual report, know the overarching purpose and concrete goals for specific impact communication process, informed by your organization's strategy. Some common reporting goals include:

- Enhance staff engagement
- Demonstrate program or funding effectiveness
- Make the business case for program change
- Attract funding
- Demonstrate the value of sector or ecosystem investment
- Align with specific development goals and targets
- Compare the performance of organizations working in a similar areas
- Demonstrate social return on investment (SROI)

## Message

Like any other storytelling, impact storytelling is an art. Good impact storytelling brings together your raw material in a way that informs, engages and inspires. The goal is to mix qualitative data with quantitative data and tell a story which communicates your organization's impact (intended and actual), speaks to your key stakeholder groups, respectfully represents your beneficiaries, and provides a clear argument for future action.

Good impact storytelling brings data to life through visuals and narrative and ensures that stories pack a punch because they are backed up by data. Good storytelling can help you bring funding to scale good results and fill a gap in a larger development picture.

Impact communication is not limited to the staff, volunteers, beneficiaries, and funders of the program, it is a piece of the puzzle for the larger systemic change. Each organization working towards a common goal has a place and responsibility to communicate their impact as part of a larger collective impact picture.

# QUALITY PRINCIPLES

Wherever you are on your reporting journey, you should strive for reporting which is Balanced, Credible, Comparable, and Integrated with Strategy.

Embed these characteristics in Input data, Compilation Processes, Information Outputs, and Engagement Processes.

## Balanced

It can be tempting to focus exclusively on the good news. Don't. Think broadly to give a balanced picture of your organization's performance. Consider shorter and longer-term horizons, governance, emerging issues and opportunities, and multiple points of view.

### Include Beneficiary Voice

When thinking about your organizational performance and impact, it is critical that you capture the perspective of your beneficiaries. Don't just assume, ASK. For frankness and transparency, this can be through direct anonymous reporting, by electronic survey or on your website. Some simple approaches to capturing these include net promoter score (NPS) or progress out of poverty (Poverty Probability Index or PPI https://www.povertyindex.org/about-us) based approach. Consider including the images, words, and stories of your beneficiaries in your external publications.

> Don't just assume, ASK. At its core, learning about impact is grounded in a pretty simple activity: listening to open and unbiased feedback from your beneficiaries.

## Credible

Impact communication is credible, or believable to stakeholders, when they are consistent, representative, and error-free. Your organization does not operate in a vacuum.

### 'Triangulate' with other data

Impact information is more credible to stakeholders when it is consistent with data from other sources. Where appropriate, and especially if your findings are surprising, use external data for context. Maybe the improvement in health outcomes are consistent with dropping rates of HIV or malaria? Were changes in educational outcomes result of a state policy change? Was microlending affected by low international interest rates?

# QUALITY PRINCIPLES

## Reporting Framework

One easy way to help ensure that your reporting is credible, balanced and comparable is to use an established reporting framework. A lot of thinking and stakeholder engagement has gone into creating these frameworks, which variously provide guidance on principles, subject matter, quality standards, and other measures to which you can align.

As with adopting or aligning to standard metrics (treated in volume 2), using a respected and familiar framework can be an easy way to establish a shared frame of reference with your stakeholders. It also enables your impact performance to be easily understood and compared by stakeholders with a top-down or comparative perspective. Sustainable development goals (SDG) are increasingly baked into prominent reporting frameworks, ensuring SDG alignment. For a primer on SDG-based reporting, please read "Aligning Impact Reporting to the Sustainable Development Goals".

It is also worth keeping in mind that frameworks are designed with various purposes in mind, and just because a framework is 'good' doesn't mean that it's a good framework for telling your impact story. Reporting frameworks can be optimized for many things,

- Purpose can be screening, monitoring, reporting, or evaluation
- Time perspective can be prospective, ongoing, or retrospective
- Orientation can focus on input, output, or outcome
- Timeframes can be a short, medium, or long-term
- Beneficiary focus can be micro (individual), meso (corporation), macro (society)
- General approach can evaluate processes, evaluate impact, or attempt to express your impact in monetary value (SROI).

In recent years, frameworks that have been primarily developed with for-profit companies in mind are used for the social sector. GRI is the dominant corporate reporting framework for environmental and social issues. GRI now provides sector guidance for the NGO sector, enabling them to measure and report their sustainability performance.

Similarly, the London Benchmarking Group recently rolled out LBG for Community, a simple input, output, impact framework for non-profits to use in reporting back to their corporate partners. It includes a set of guiding principles for practitioners across non-profit and corporate sectors responsible for negotiating impact measurement, reporting, and partnerships.

# QUALITY PRINCIPLES

## Comparable

Comparable impact information is provided in sufficient detail and in a format that enables users to match it to similar information across different organizations in an industry, and between years for the same organization. Comparability allows users to make decisions about the organization and choose between alternatives.

Metadata are the data providing information about one or more aspects of the data; it is used to summarize basic information about data which can make tracking and work with specific data easier. If you look back on the work you did in Volume 2 to define enduring metrics, you will find the raw ingredients of the metadata for your impact communication. Make your impact information easy to find for your stakeholders. For example, if they want to know how many respondents participated in a survey and how were they contacted, they should be able to find out.

Good metadata also improves the credibility of your impact communication, because you are supplying stakeholders with sufficient information to make a critical assessment of the quality and representativeness of your impact information.

## Integrated with strategy

Impact information is integrated with strategy when it clearly ties impact goals to organizational goals. If your impact data collection has been driven by your vision, mission, and theory of change, it is hard for your impact communication to be anything other than integrated with strategy. If you're not feeling confident in these areas, review Volume 1: Groundwork.

If you are starting impact measurement and reporting for an existing organization, your impact communication should reflect the organization's larger strategy, and track progress toward the strategy. Organizational strategy drives choices about what data to collect and how to present information. The findings of your impact measurement (see Evaluation, this volume) informs and influences the strategic management of the overall organization.

# WHAT TO INCLUDE IN AN IMPACT REPORT

## Executive Summary

The Executive Summary is perhaps a most critical section of the impact report. It should be written by your organization's leadership after you are confident of the impact story you want to tell. The summary should have a specific audience in mind and highlight part of your performance that matters most to them. It should attest that organization's leadership is standing by the information reported.

## Impact Strategy and Goals

Whether you are either reporting on the overall work of your organization, a portfolio of investment, the effectiveness of a single initiative program, or social return on investment or funding, you should be guided by a strategy. Don't make your stakeholders guess what that is, tell them! The impact goals you aim to meet along the way to achieving your vision can be expressed as outcomes or based on indicators.

- Outcome: What are the big issues that you are trying to move the needle on? These should clearly align with your mission and project goals. Additionally, you may choose to align with sectoral or global goals such as sustainable development goals (SDGs).
- Indicators: What performance gauges are on your dashboard to show how you're tracking? Whether or not you publish them for external stakeholders, we recommend monitoring key social, financial and operational indicators throughout the year to ensure that you're staying on track. Select perhaps five key indicators with three years of data to understand how much they typically vary.

## Data Visualization

They say a picture is worth a thousand words. Data visualization helps users analyze information by making complex data more accessible, understandable and usable. Think carefully about what you are trying to say with your data—whatare they evidence of?—and choose an appropriate chart or graphic to show that.

**RESOURCES: DATA VISUALIZATION EXAMPLES ON PAGE 20 & 21**
**DATA VISUALIZATION RESOURCES ON PAGE 22**

# REACHING YOUR AUDIENCE

After considering all the elements of your organization's impact goals, relevant metrics, and correct data, you know the impact story you want to take to your stakeholders. You have woven them all together with your particular audiences in mind. Now how to reach them? The facts of your impact performance should be consistent, but how, where (channel), and in what format you present those facts will be tailored to your target audience.

- The content is a narrative your organization tells with words and numbers e.g. key messages, stories, or metrics.
- The channel is where information is distributed.
- The format is how the information is presented e.g. 140 character tweets, informative brochure, a financial report with downloadable tables, pdf report, a website, or video.

Effective reporting communicates information that matters to stakeholders in ways that are useful to them and inform their decisions. In other words, it reaches the right audience at the right time, in the right format, for maximum impact. This section will provide guidance on how that can be achieved.

## Channels

Communication channels are the fastest growing field in the impact management sector today. Not too long ago printed materials like flyers, postcards, books, magazines were widely used and were an excellent medium to reach out to your audience. As the channels are growing and the average age of the audience is decreasing you have to put some thinking and strategy behind how to maximize your reach.

- Who is your audience? Refer back to your stakeholder list, who is this impact communication for? Are you primarily speaking to your funders, or are you also targeting the larger audience?
- Where is your audience? Depending on your organization's work, your audience can be urban or rural, residing in developing country or developed country, they can be online or offline.
- Which media channels do they use? LinkedIn is popular with businesses and impacts investors, but it is used less by nonprofit or foundation personnel. Does your audience seek information on Facebook, Twitter or LinkedIn, or do they rely on newsletters to their inbox by services like MailChimp?
- How do they receive the information? Information can be pulled, in the sense that stakeholders check your website/social media or come to a meeting or information can be pushed in the form of an email or letter. What kind of device do they use to receive the information, mobile or desktop? Is TV an option?
- How will they use the information, and for what purpose? This helps you understand what format is appropriate.

# REACHING YOUR AUDIENCE

## Format

There are many potential channels for your impact communication, and it's worth spending a bit of time to tailor your impact communication appropriately. Good reporting is in a format appropriate for the channel you're using, as well as appropriate to stakeholder needs.

Communication approaches that work on paper are not always effective in other channels. Having a PDF of your printed report on your website is fine, but it would be a lot more effective to have a section of your website dedicated to your impact strategy and performance. A LinkedIn post looks different from a tweet on Twitter. Video content can be a powerful form of impact communication, but you wouldn't use it to simply read out your impact report!
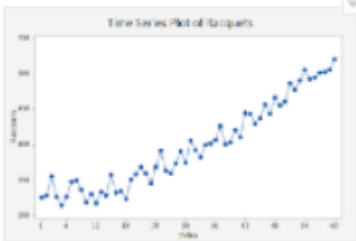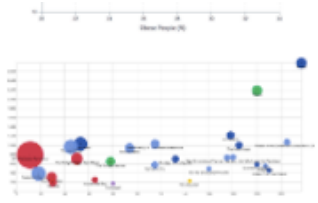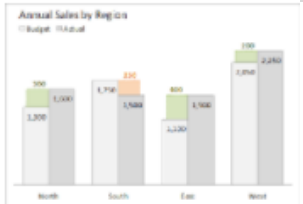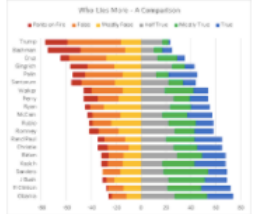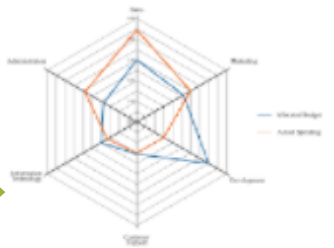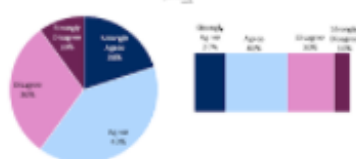
Do you know how your stakeholders will use your information, and what formats work well for that? Your stakeholders can be important advocates, so make it easy for them to talk you up! If you know that your data is likely to be put into tables to compare with other organizations, for instance, consider offering downloadable tables rather than just static images. If your stakeholders are showcasing your organization in presentations, maybe you want to offer a slideshow or short video of your best impact stories.
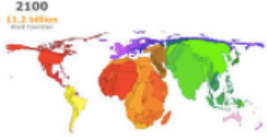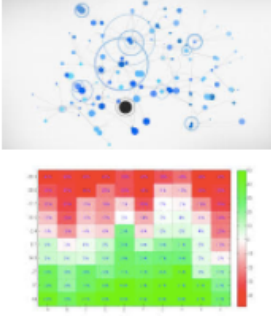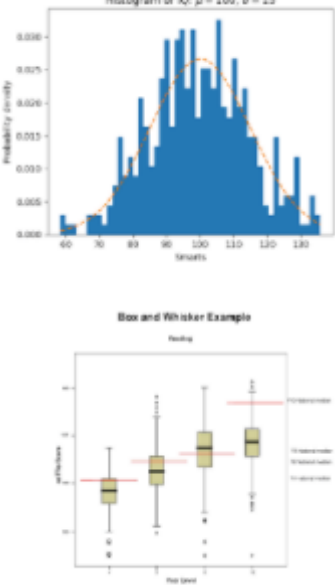
## Ongoing Engagement

Good impact communication is an ongoing conversation. Organizations get the most value from impact reporting when they engage in ongoing, two-way communication between the reporting team and the organization's stakeholder (both internal and external!).

Engagement with stakeholder around your impact encourages the incorporation of that feedback into decision-making and is crucial for transitioning from 'producing an impact report' to 'impact management.' How can you foster an ongoing two-way impact conversation with your stakeholders that informs, engages and inspires? Ensure that there are feedback channels to answer questions and learn what information is used and valued, which stories inspired and which ones fell flat. Use that information to adjust and improve.

# Data Visualization Examples

| What you want to show | Detail | Example |
|---|---|---|
| Change Over Time | Showing change in a single indicator over a period of time, ie.unemployment or student enrollments use a line chart. For multiple types of information, say total unemployment over time + breakdown for women and men, conside layered or stacked area charts. |  |
| Data That Moves Together (Correlation) | Comparing two or more indicators to see if they tend to move in the same or opposite directions. For example, plotting unemployment (X) and inflation (Y) for a sample of months. Use a scatter plot for a simple version, or a bubble chart for more complex data. |  |
| Deviation From a Target | Comparing an indicator against a reference, such as your actual versus target outcome. Paired bar charts are great for this. |  |
| **Comparison (Ranked)** | Comparing a key indicator in ascending or descending order, such as income (the indicator) by village during a single period. |  |
| Comparison (Unranked)  | Comparing an indicator by categories in no particular order, such as the number of programs by region, use a bar chart. For comparing multiple series by a set of indicators, such as comparing the performance of programs on multiple indicators, consider a radar diagram or spider plot. |  |
| Part-To-Whole | Measuring something as a percentage of the whole, such as the proportion of women-led businesses or school-age children enrolled in school. Either a pie chart or bar chart can be used. |  |

# Data Visualization Examples

| Data Type | Detail | Example |
|---|---|---|
| Geographic or Geospatial Information | Comparing a variable across a map or layout, such as the unemployment rate by state or the number of persons on the various floors of a building. Map-based displays of data are called cartograms. |  |
| Showing Themes in Qualitative Data | Word-clouds or tree maps |  |
| Conveying Mixed Information Related to a Single Theme | Infographic |  |
| Identifying Clusters, Connections & Influencers | Network Analysis or heat-maps |  |
| How Many & How Often? (frequency distribution and deviation) | This shows how many observations of a particular indicator fall into each discrete category, such as the number of visits to a medical clinic in each month of the year, or how many program beneficiaries fall into each income band. A histogram, a type of bar chart, is designed to show this.<br><br>A boxplot is an advanced version of a histogram that visualizes key statistics about the distribution, such as median, quartiles, and outliers--these are great for analytically sophisticated stakeholders, but risk being confusing and offputting to the average user. |  |

Disclaimer: All the data visualizations are for examples only and do not contain real meaningful data.

# Data Visualization Resources

Things to watch out for when presenting data in charts and tables:

- Large 'other' category
- Bar charts that do not start at 0 on the y-axis
- Confusing correlation with causation
- Improper use of averages--do you want a mean or a median?
- Abuse of pie charts: too many items, too much detail, confusing colors, similar slices
- Too much color; visual clutter

Where to go for inspiration

- Information is Beautiful
- Gapminder
- Our world in data

Animation Video Tools

- Biteable: An animated video maker that's fast, easy, and fun
- Animiz: The simplest animated video presentation software to create professional animated video presentations
- RawShorts: Make an awesome explainer video today

Infographic Tools

- Pletica: Helping people visualize & connect information so they can get on the same page
- Venngage: Tell your stories and present your data with infographics
- Piktochart: A simple, intuitive tool that helps you tell your story
- Visme: Tell powerful visual stories in the form of engaging presentations, infographics and other visual content
- Infogram: Create engaging infographics and reports

# GLOSSARY

IMPACT The intended and unintended long-term consequences (both positive and negative) of a program or an initiative. It is a systemic change over time. It can be difficult to ascertain the how much of this systemic impact is attributable to one program since several other programs in and out of your organization can contribute to the same impact in positive and negative ways.

THEORY OF CHANGE A map that defines long-term impact a program seeks to deliver the logical relationship between inputs, activities, outputs, outcomes, and impact. This is created by working backward from the desired impact to identify necessary preconditions. A good theory of change should be plausible, feasible and testable. Theory of Change includes Inputs, Activities, Outputs, and Outcomes.

INPUT What we use in the project to implement it. In any project, inputs would include things like a human resource (personnel), financial capital, machinery such vehicles, and equipment such as whiteboards and computers. Inputs ensure that it is possible to deliver the intended results of a project.

ACTIVITY Actions associated with delivering project goals. In other words, they are what the personnel/employees do in order to achieve the aims of the project.

OUTPUT the direct results of a project in the short term. An easy way to think about outputs is to quantify the project activities that have a direct link to the project goal.

# GLOSSARY

OUTCOME the intended medium-term consequences of a program. Outcomes are the second level of results associated with a project and refer to usually relate to the project goal or aim.

METRIC A defined system or standard of measurement to track the progress of change by your organization. In the impact space, there are standard metrics and custom metrics. Standards are written by research and evaluation organizations and generally exist around focus areas or organization type. Custom metrics are created by an organization and are designed around their use case.

PRIMARY DATA Primary Data refers to any data found in the field. It represents individual clients or beneficiaries and is much more granular than summary data.

AGGREGATE DATA Aggregate Data refers to individual data points that have been summarized together to depict the bigger picture at the program level.

STAKEHOLDERS  Stakeholder is a person, group or organization that has interest or concern in an organization. Stakeholders can affect or be affected by the organization's actions, objectives and policies.

## IMPACT GLOSSARY
## A GLOBAL REPOSITORY OF IMPACT TERMINOLOGIES

Formulated During the American Evaluation Associations Annual Conference in Atlanta the Impact Dictionary is aimed at streamlining Communication among M&E, Impact Investing & International Development Communities.

# THANK YOU

This concludes Actionable Impact Management (AIM) 'Volume Four: 'Communication'

Do you have feedback on Volume Four?
We'd love to hear it. Go ahead and connect with us to let us know what you think.

sopact

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