SureImpact

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The Ultimate Guide to Impact Measurement

A Step-by-Step Guide for Leveraging Technology to Track, Measure, and Communicate your Unique Impact.

Introduction

Like many social-good leaders, you've heard about the importance of measuring your impact. Billionaire philanthropist Mackenzie Scott is one of many funders reported to be giving away significant amounts of funding to nonprofits who are able to demonstrate positive impact. Organizations that can demonstrate their unique impact are three-times more successful at raising money than those organizations who cannot show impact.

Impact-centric organizations use data to prove they are delivering impactful, equitable, cost-effective, and sustainable solutions to complex social problems. They define their success by the distinct impact they are making and the effectiveness of the services they deliver relative to the resources at their disposal and the level of need. Leaders of these organizations ensure success and improve on the success they achieve by gathering data through measures aligned with stated goals and outcomes.

Despite the stated benefits and your desire to use data to demonstrate impact to funders and stakeholders, you may be struggling with how to begin. You and your team may also be feeling like you don't have enough time, money, or expertise to commit to collecting, analyzing, and using key metrics in your decision-making and marketing. You may believe your objectives are too vague or intangible to quantify.

There is also a lot of confusion about what "impact" really means. Leaders know the value of metrics but often are unsure about what to measure in order to quantify their impact.

That's why we've put together this Ultimate Guide to Impact Measurement. The goal of this guide is to break down the steps for using technology to become an impact-centric organization into bite-sized pieces that are easily digestible. It will equip you with confidence and a roadmap to begin measuring and communicating the impact that your organization makes.

INSIDE THIS GUIDE:

- Defining Your Organization's Logic Model
- The Three Types of Data you need to collect in order to measure your impact
- Creating Objectives
- Collecting Data
- The Importance of Technology

ORGANIZATIONS WHO CAN DEMONSTRATE THEIR IMPACT

3x

MORE LIKELY TO RAISE MONEY THAN THOSE WHO DON'T

About the Author

For more than 20 years, Sheri Chaney Jones has worked alongside foundation, non-profit, and government leaders to help them use data to solve complex social problems. An author, professor, and internationally recognized expert, Sheri believes in data, metrics, and accountability. After a 10-year career in government evaluating the impact of public funding, Sheri founded Measurement Resources Company in 2010. Now a national firm, Measurement Resources increases the capacity of non-profit and government sector organizations through high-performance practices and data-driven insights.

In 2018, Sheri launched SureImpact to automate and simplify the process of collecting and sharing outcomes and impact data. Sheri is a thought leader on public sector evaluation and applied organizational research. She is the author of Impact & Excellence: Data-Driven Strategies for Aligning Mission, Culture, and Performance in Nonprofit and Government Organizations (Jossey Bass, 2014). Sheri is passionate about women's equity and the advancement of girls. She is a past president of the National Association of Women Business Owners and a Commissioner for the Columbus Women's Commission for the Mayor's Office. Sheri holds a Master of Arts degree in Industrial and Organizational Psychology from Central Michigan University and a Bachelor of Science in Psychology from The Ohio State University. Sheri, her husband Matt and their four children live in Columbus, Ohio.

Before You Get Started

Becoming an impact-centric organization can be a big shift in culture and thinking for some nonprofit organizations. Many organizations say they are driven by impact, but few have systems in place to make the case that they're actually achieving their mission.

Becoming impact-centric first requires becoming accountable to the outcomes your organization generates. It then requires the collection and use of data to prove these outcomes.

If your team is ready to get serious about pursuing impact, read on!

Defining Your Organization's Logic Model

The best way to begin the process of becoming an impact-centric organization is to clearly define your organization's logic model. This is often known as your theory of change, the roadmap that successfully connects an organization's resources and activities and demonstrates how these inputs and outputs correspond to the ways the organization creates positive social change.

For example, why does your organization exist? What are your goals for changing the lives and circumstances of those beneficiaries who receive your services? Who are the individuals in your community who need your services the most?

Once you have determined this, you can then drill down into what you should be measuring to understand and prove how your services are facilitating these changes with your desired population.

EXAMPLE LOGIC MODEL

INPUTS

- United Way Funding
- Local Providers
- Sureimpact

OUTPUTS

- Education Services
- Employement Services
- Financial Literacy Services
- Housing Services

SHORT-TERM OUTCOMES

- Improved school stability
- Access to assistance with basic needs
- Linkage to needed wraparound services
- Access to rental/mortgage assistance

MEDIUM-TERM OUTCOMES

- Improved education outcomes
- Improved housing stability
- Improved financial stability

LONG-TERM OUTCOMES

- Stable Homes
- Thriving Families
- Successful Students

The Three Types of Data

There are three types of data you need to collect in order to measure your impact:

Demographics

Who you serve.

Outputs/Activities

How you serve them.

Outcomes

How those you serve are better off as a result.

WHO YOU SERVE

Many people think that nonprofits are completely different from for-profit businesses. While the overarching goals of a social-good organization are different, the need to understand your audience is similar. Here are some questions you should understand about your audience if you are collecting the right demographic data:

- Who are the individuals that most need your services?
- Are you able to communicate the needs of those you serve?
- Are your programs serving who you intended to serve?
- Is your programming delivering equitable outcomes for a wide variety of individuals?
- If not, is there an opportunity to develop more appropriate and effective interventions?

While there are a wide variety of client demographic data you can collect, here are a few key data points to start:

- Age
- Gender identity
- Race & ethnicity
- Household size
- Annual Income
- Employment
- Education Level
- Zip Code

HOW YOU SERVE PARTICIPANTS

Output metrics track individual program details and the volume of work produced. How many meals did you serve? How many hours of services did you provide? How much money did you spend providing stable housing for families? These are the metrics that tell you where your time and resources are being spent. Even if your staff members don't call this process "counting outputs," your organization probably already does this on a regular basis.

HOW THOSE YOU SERVE ARE BETTER OFF

Outputs are important, but they don't tell the complete story of how your organization is effectively changing the lives of those you serve. Impact-centric organizations move beyond measuring outputs and begin to monitor and use outcomes data as part of their decision-making and management process.

Though it may sound intimidating, every organization has the capacity to measure and communicate impact. A common myth is that your organization's impact is equal to the number of services you have provided. As we just discussed, those are actually your outputs. What funders really want to know when they ask about impact is how individuals and families are better off as a result of their investment, or their outcomes.

In this section, we'll help you get started with measuring outcomes.

To begin, take some time to write down your answer "to" the following questions:

- What does success for your organization or program look like?
- Are you able to demonstrate that your program is producing positive results for your participants?
- What positive changes have occurred in their individual lives because of your nonprofit?
- What positive changes do you want to occur in their individual lives?

Likely, your response will be drawn from your organization's mission statement and goals. Broadly speaking, success might include:

- Increased knowledge and learning
- Changed attitudes
- Increased readiness
- Reduction of undesirable behavior
- Increase of desirable behavior
- Maintenance of new behavior
- Increased economic conditions
- Improved health conditions
- Increased economic development
- Increasing constituent knowledge and learning
- Changing constituent attitudes
- Increasing constituent readiness
- Reducing an undesirable behavior
- Increasing a desirable behavior
- Maintaining a new behavior
- Improving participants' economic conditions
- Improving participants' health conditions

Creating Objectives

The next step is to create a measurable roadmap to your ultimate goal identified in the questioning process. You can do this by breaking your goals down into a series of concrete benchmarks called objectives. Objectives are different than goals in that they are more specific and have a shorter time frame. When you're clear about what results you want to achieve in the short term, it becomes easier to assess whether your actions are leading to your long-term goals.

Objectives should directly address the program or societal goal you are pursuing. Always think in terms of your constituents, consumers, clients, etc. Avoid objectives that focus solely on you and your time, like developing a communications plan. Objectives should focus on the outcomes you want to achieve on the way to your goal.

Good objectives are SMART: Specific, Measurable, Attainable, Result-focused, and Time-specific. For example, an organization that desires to promote the health and wellness of the community by increasing housing stability for single moms may set the following roadmap with SMART objectives.

S Time-bound	M Measureable	A Attainable	R Relevant	T Time-bound
• What is your goal? • Can you define it as clearly as possible?	• How will you measure your success? • What metrics will you use?	• Is your goal achievable? • What roadblocks will you face?	• Is the goal relevant to your organization? • Is it worth targeting?	• How long will it take you to complete your goal? • What's your roadmap going forward?

By the end of the first quarter, we will have:

- Conducted at least 75 whole-person assessments.
- Tripled the number of participants who set goals to increase financial stability.
- Increased the number of service referrals made to community partners by 5%.

By the end of the first year:

- Increase the number of participants who report positive perceptions of their experience and outcomes by 10%.
- We will partner with at least three new affordable housing providers.
- There will be a 5% increase in the number of participants earning a livable wage.

Establishing smaller objectives on the road to your overall goal will help leaders know where the programs or activities are not doing what they intended them to do that would prevent them to reach their goal. For example, if the organization is unable to establish the initial meetings, it may be unlikely that they will get momentum in getting organizations signed up as referral partners. Leaders can quickly make changes to course correct, allowing faster achievement of ultimate goals.

Collecting Data

Whatever success looks like for your organization, you now know that being able to quantify your impact will require tracking who you served, how you served them, and how they are better off as a result. Having outcome data available to make informed decisions starts with establishing a reliable data-collection culture.

Whether you are collecting demographic data or outcomes data, some best practices apply across the board. Having the basics down during data collection and entry builds a solid foundation for your programming. In today's world, where there are vast amounts of data to manage, ensuring your data is accurate from the beginning takes on a whole new level of importance.

Collecting data should:

- Be easy. Staff need a simple way to collect data so they can spend their time on what really moves the needle.
- Be secure. Protecting sensitive client information is critical. Staff need a secure way to collect and store client data. Individual Excel spreadsheets scattered throughout an organization are not secure.
- Be integrated into an organization's culture and involve every level of the organization.
- Provide real-time insights into client demographics, outputs, and outcomes.
- Be standardized across organizations and programs.

The Importance of Technology

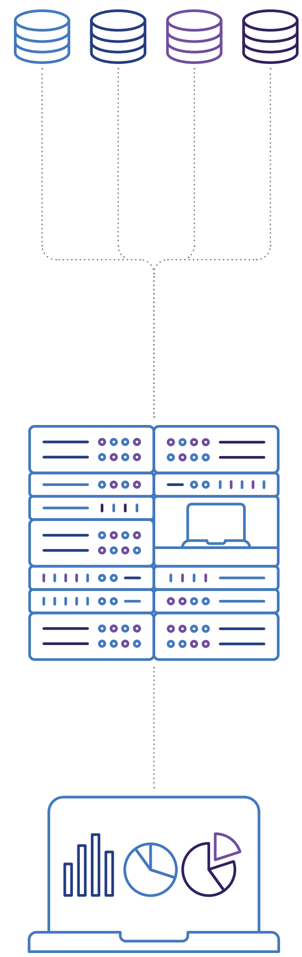
Software is the key to optimizing data tracking. Once you have established your theory of change and determined what you want to measure, you need a plan for implementing tools that will automate the process of data collection and reporting and ensure your organization's continued success. Technology does not replace people; it optimizes the team members you have and makes it possible to expand your organization's capacity to serve the individuals and families in your community with the highest level of need. The right software tools help you get the most out of your team members without overwhelming them and causing burnout.

One of the biggest challenges nonprofits face is a lack of centralization and consistency. Their operations are often disjointed, and they're trying to manage information coming from many sources: frontline staff, consultants, practitioners in the field, contractors, and so on. This can lead to chaotic internal processes. Another challenge is the lack of visibility across programs.

Organizations using paper forms and Excel spreadsheets struggle to provide person-centered care that addresses all of their participants' needs because they lack the visibility across the organization's programs and services. Technology helps your programs run more efficiently by streamlining data collection, reporting, and compliance procedures. If there's a problem with a program, everyone should have access to the same data and be able to collaborate easily. When it's time to assess impact, information shouldn't be scattered.

Technology also simplifies reporting and increases trust with funders and stakeholders. At a time when nonprofits are under immense pressure to demonstrate their effectiveness, technology is indispensable. When a funder wants information about a project, nonprofits should be able to produce it quickly.

Technology can help solve these problems. Data for all of your programs can be stored in a single place, and outcomes and analytics dashboards provide quick insights into the organization's performance.



Are You Ready to Become Impact-Centric?

Hopefully, this guide makes the process of getting started with impact management a little easier. Share these insights with your team to guide your search and vetting process.

Visit sureimpact.com to view a demo of our impact management platform.

ABOUT SUREIMPACT

SureImpact is a data collection and impact management software that was built for the social good sector by people who have been working in the government, nonprofit, and collective impact initiatives for over twenty years. From communicating to donors and funders to understanding the factors that produce the best outcomes for your organization's participants,

SureImpact can help you secure the impact-centric future you envision.

ABOUT TRAILBLAZE CREATIVE

TrailBlaze Creative is an award-winning marketing firm focused on purpose-driven work. Specializing in long-term partnerships, TrailBlaze embeds itself within organizations to provide tailored, strategic support. By crafting innovative campaigns, fostering meaningful connections, and driving social change, TrailBlaze helps nonprofits and communities amplify their impact and share stories that inspire lasting action.

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