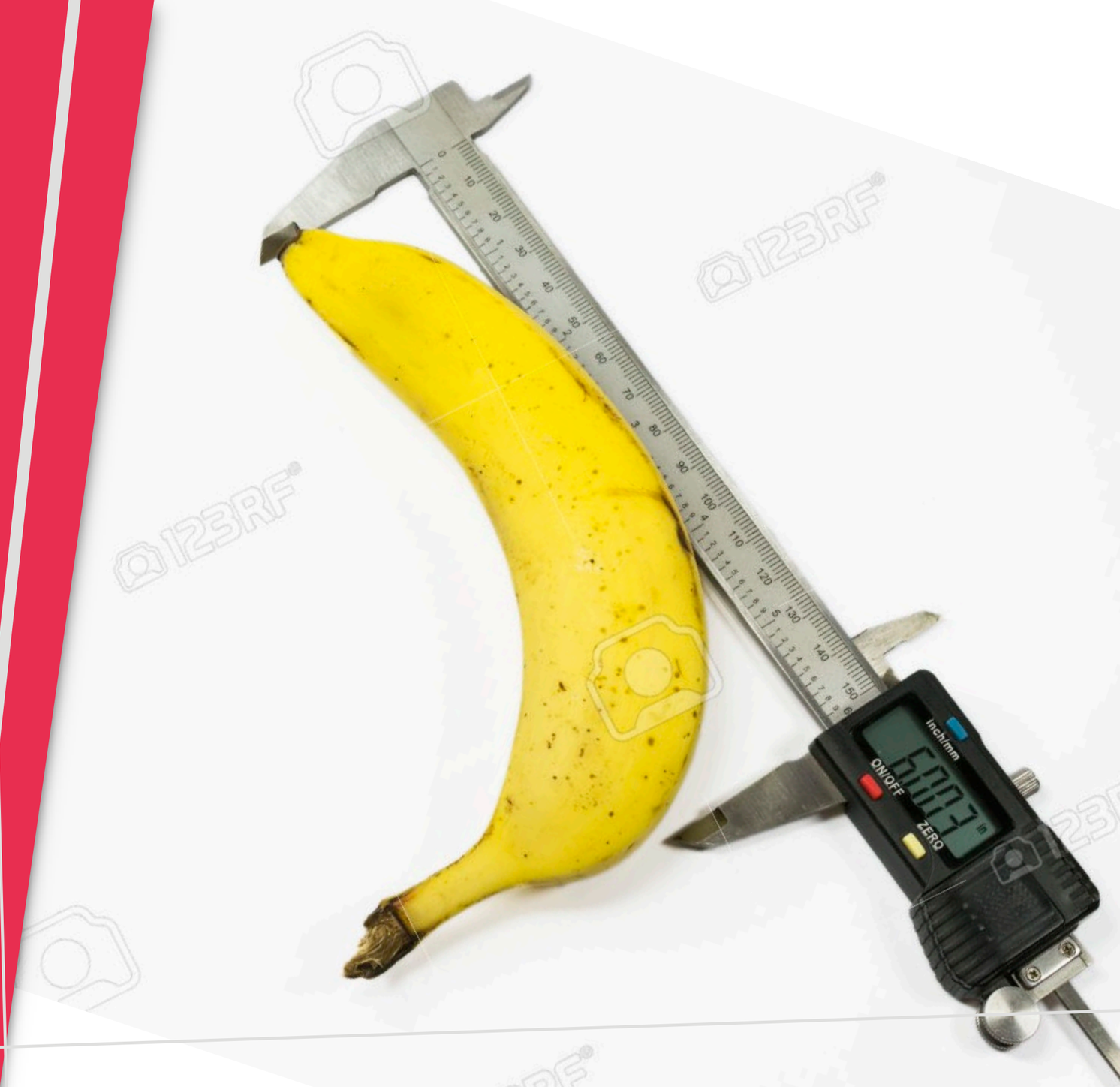
Practical Impact Measurement

Session 1 of 2: Clarifying Information Needs

Please have a pen/pencil and some paper at the ready for the workshop exercise!

junxion

VANCOUVER | TORONTO | LONDON



Success stories of the next economy

A burgeoning new economy is emerging from the grassroots in every city and on every continent.

Bold social entrepreneurs, courageous intrapreneurs, and concerned citizens of all ages, genders, and cultures are charting a path away from a failing economic model.

We are thoughtful peers and committed partners to those who already occupy the next economy and we're dedicated allies to the many who are striving to be a part of it.

We help leaders build the success stories of the next economy.

Certified B Corporation

Social Venture Circle

Our Approach

We help our clients to:

Articulate their **purpose**

Plan for **impact**

Share their **stories**

Demonstrate **accountability**

junxion

VANCOUVER | TORONTO | LONDON

COMMON APPROACH

TO IMPACT MEASUREMENT

Vancity

Community Foundation

Outline for today

- What is the minimum standard for impact measurement?
- How might we get started? (practical first steps)
- Let's clarify information needs and uses with an Information Map
- Let's look at some examples of Impact Snapshots
- How might impact measurement help us, in practice?
- Questions

- **Goals for today:**
  - Get started on an Information Map that you can use right away
  - See the "bigger picture" thinking and activities behind an Impact Snapshot
  - Find some useful resources
  - Get inspired about measuring impact

What are the Common Foundations?

The Common Foundations articulate **a minimum standard** for impact measurement practice without prescribing any particular method or approach to impact measurement.

It is important to articulate a minimum standard so that a wide variety of choices in impact measurement approaches are not mistaken for "anything goes".

Thus, the Common Foundations are **a flexible standard**. They articulate some minimum requirements while giving each organization tremendous latitude in how they meet those requirements and leaving room for organizations to exceed those requirements.

Common Foundations: Essential Practices

Common Approach to Impact Measurement

Plan your change (e.g. Logic Model or Theory of Change)

Use performance measures (i.e. indicators that make sense for your organization)

Collect useful information

Gauge performance and impact

Report on results

Common Foundations: Essential Practices

Plan your change (e.g. Logic Model or Theory of Change)

Use performance measures (i.e. indicators that make sense for your organization)

Collect useful information

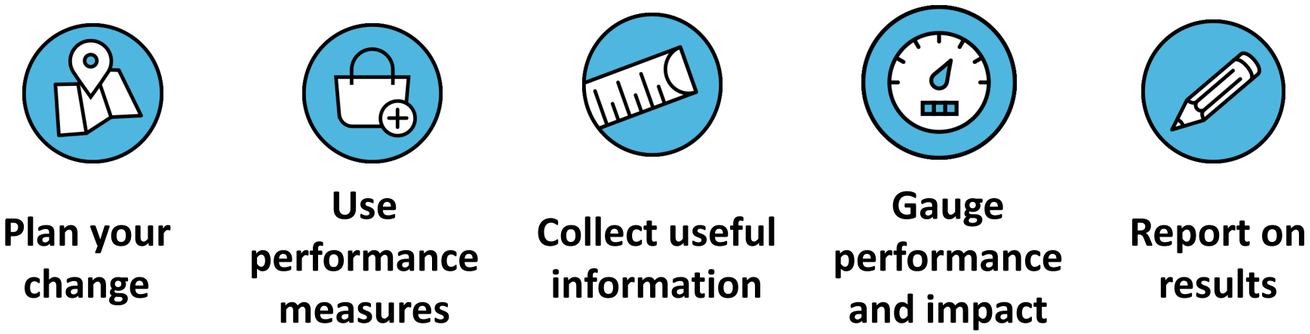
Gauge performance and impact

Report on results

Common Foundation: Indicators	Explanation
Identify the information you need to show progress and impact	Think of what your stakeholders need to know and what you want to show. Draw on the learning from your theory of change, outcomes map, or logic model if you have one.
Explore existing indicators that might be relevant	Consider using existing indicators. Several initiatives have created “indicator banks” for particular fields of work. If these meet your needs, use them—aligning them where you can.
Link indicators to your planned outputs and outcomes.	Use one or more indicators for each outcome, to show the difference you have brought about (outcome indicators). Activities should also have indicators, to show the amount or type of work carried out (output indicators).
Ensure that your indicators are S.M.A.R.T.	Employ Specific, Measurable, Accurate, Relevant, and Time- Bound indicators. They show progress over a reasonable length of time and focus on changes that can be observed and measured.
Source financial proxies from credible authorities.	If you choose to quantify outcomes in monetary terms, ensure proxy indicators are taken from credible sources.

The Common Approach

In general, if you follow the five Foundations:



Plan your change

Use performance measures

Collect useful information

Gauge performance and impact

Report on results

COMMON APPROACH
TO IMPACT MEASUREMENT

You can say you are aligned with the Common Approach to Impact Measurement

More information: https://commonapproach.org/

How do we get started with measuring impact?

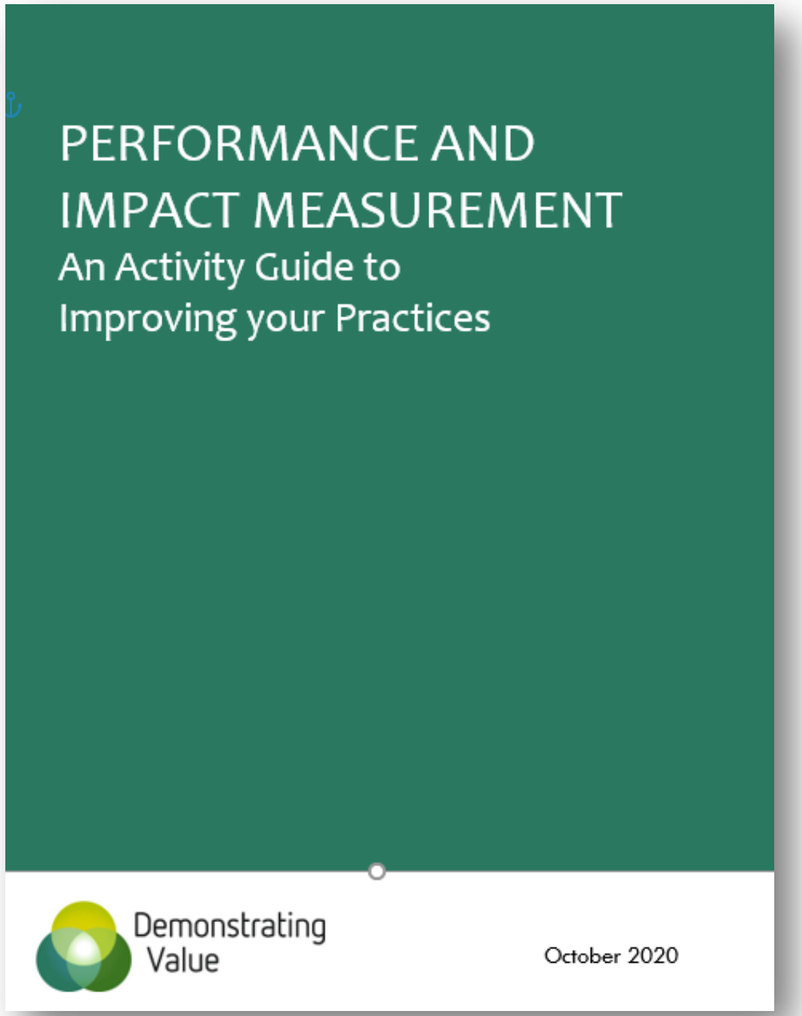
Right Scale

COMMON APPROACH

TO IMPACT MEASUREMENT

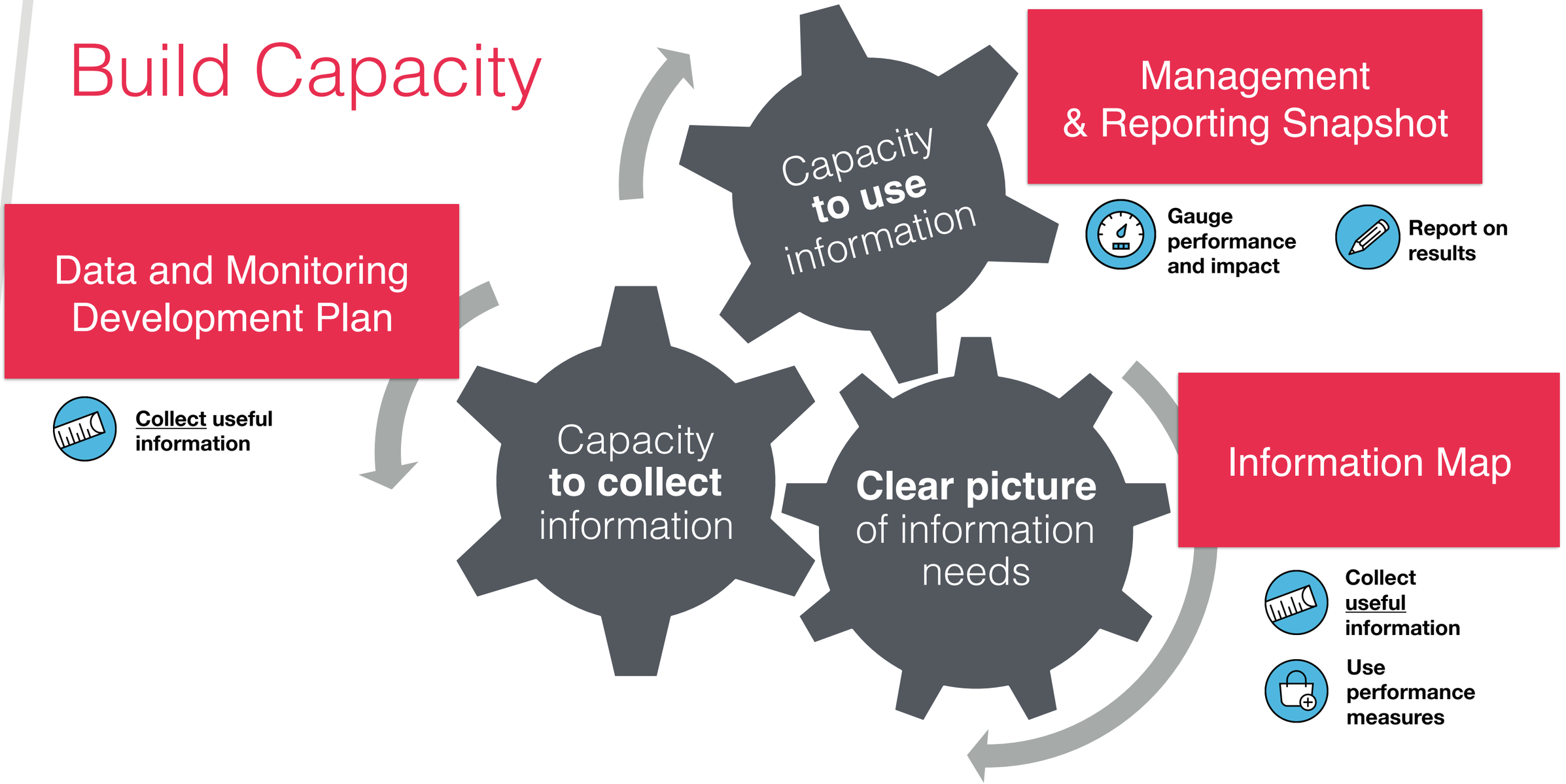
Vancity

Community Foundation



Free workbooks: dvtools.org

Build Capacity



Clear Milestones

ACTIVITY

1. Mapping

What do you do? Why is it important?
What you need to know and show?

2. Prioritize monitoring needs and actions

3. Develop snapshot content

4. Implement monitoring and reporting improvements

OUTPUT

Information Map

Use performance measures

Collect <u>useful</u> information

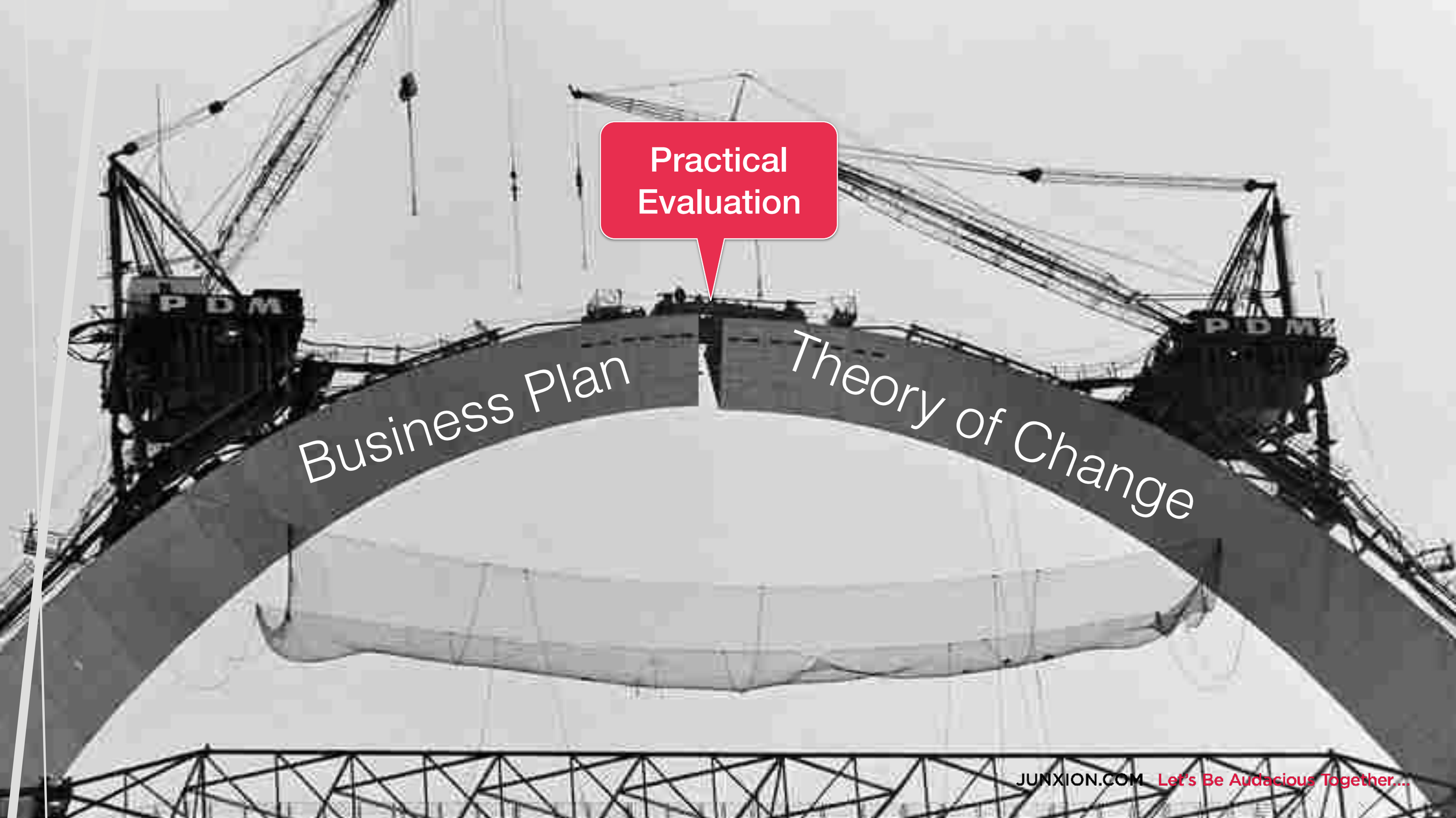
Data and Monitoring Development Plan

<u>Collect</u> useful information

Management & Reporting Snapshot

Gauge performance and impact

Report on results


Practical Evaluation
Business Plan
Theory of Change

"I THINK YOU SHOULD BE MORE EXPLICIT HERE IN STEP TWO."

Exercise:
Information Map

(Get your paper and pencil ready)

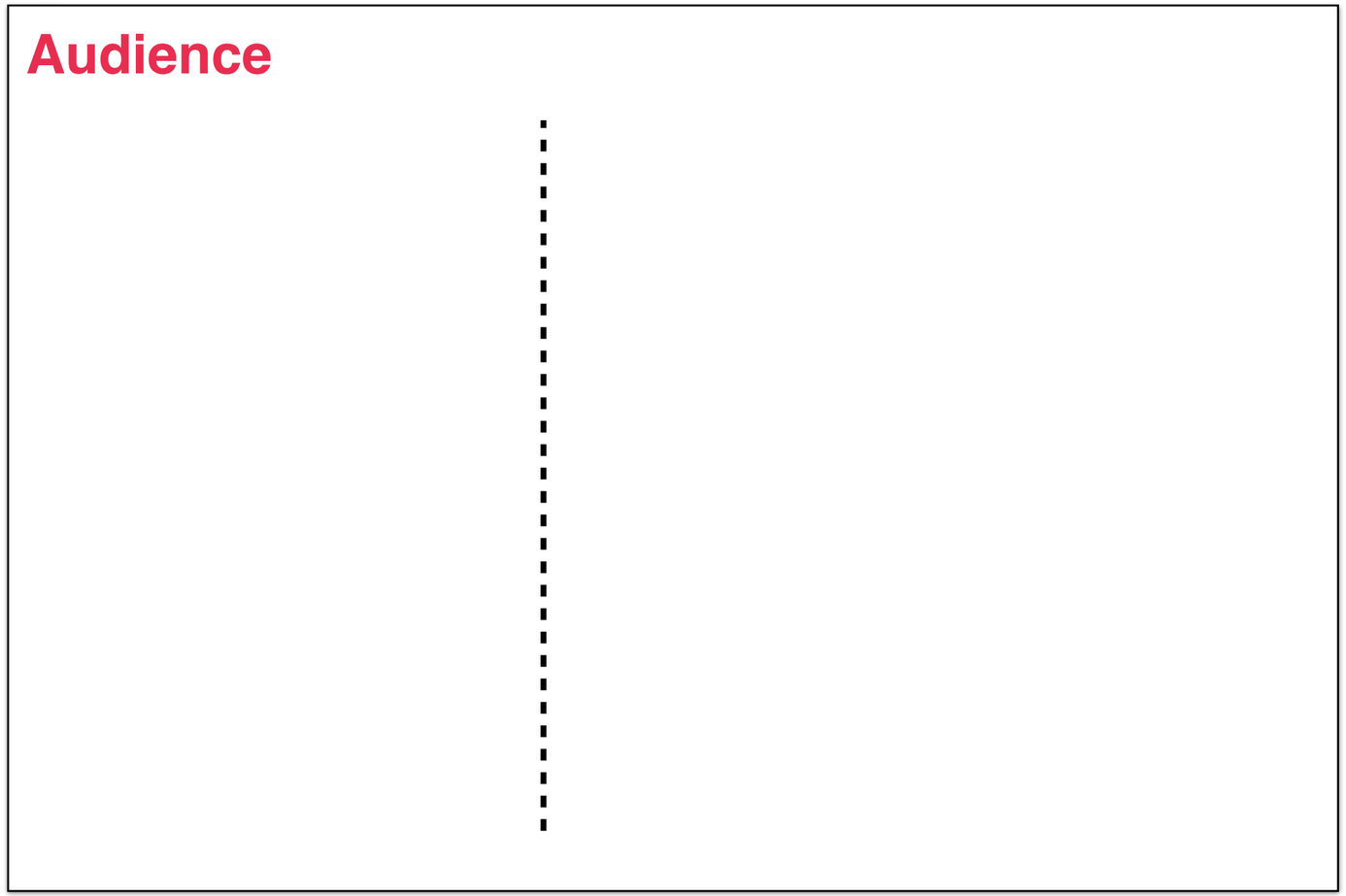
Two Lenses for Information Needs

Choose Audience and Goals

- What do you want to **know**, and **show?**

- **Who** is your audience?
  - Management (i.e. you)
  - Board
  - Staff
  - Funders / Investors
  - Clients / Customers
  - Beneficiaries
  - Service delivery partners
  - Local community members

Start your Information Map



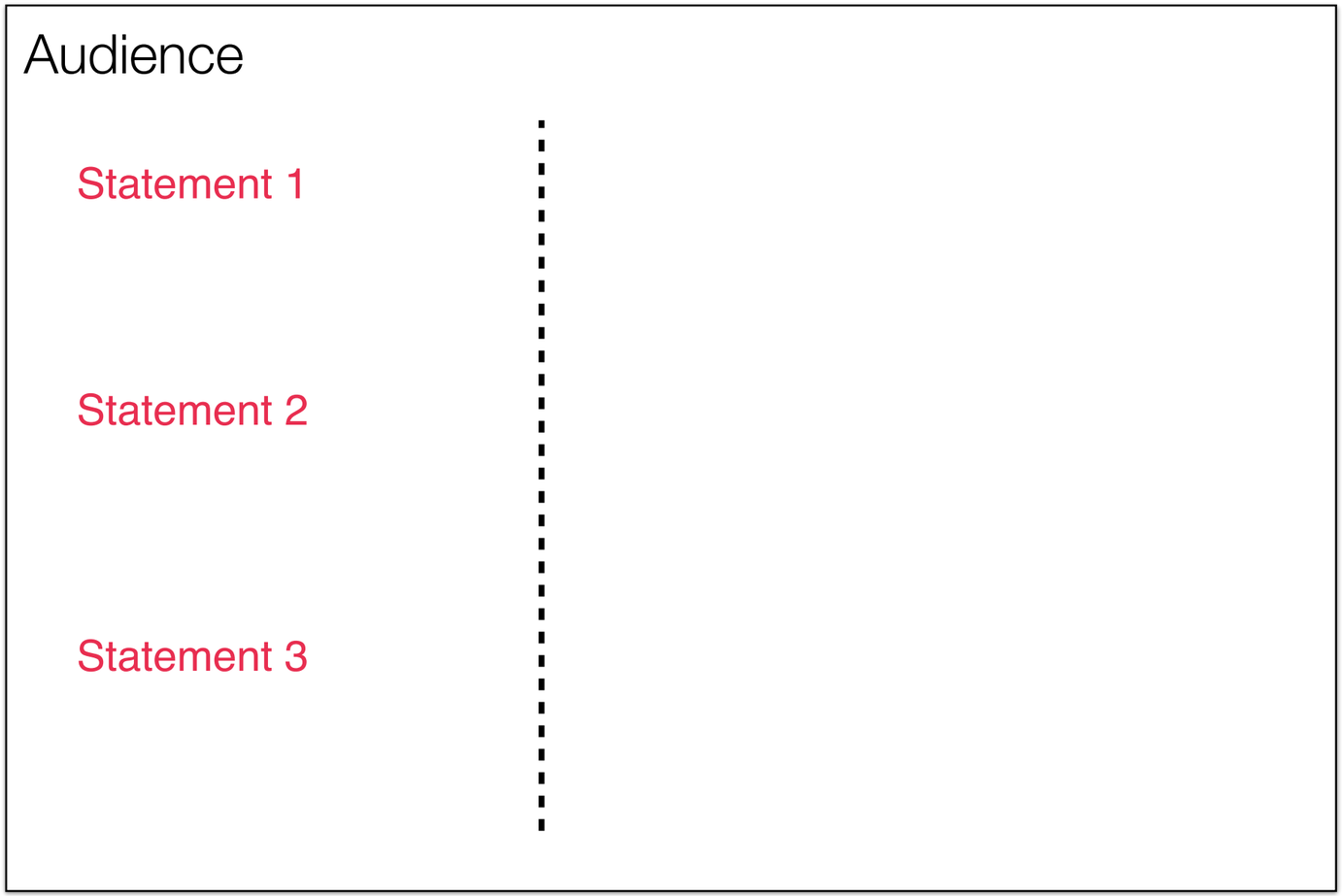
An Impact Narrative

Generic Version	Short Form
The issue that we addresses is significant	Significant Issue
We have an innovative and scalable business/service model based in a deep understanding of the issue	Right Model
Our product or service is valuable and appealing to stakeholders	Appealing and Valuable
Our product/service makes an impact on the problem it aims to address	Impact
We are efficient and effective, with a coherent management approach	Right Management

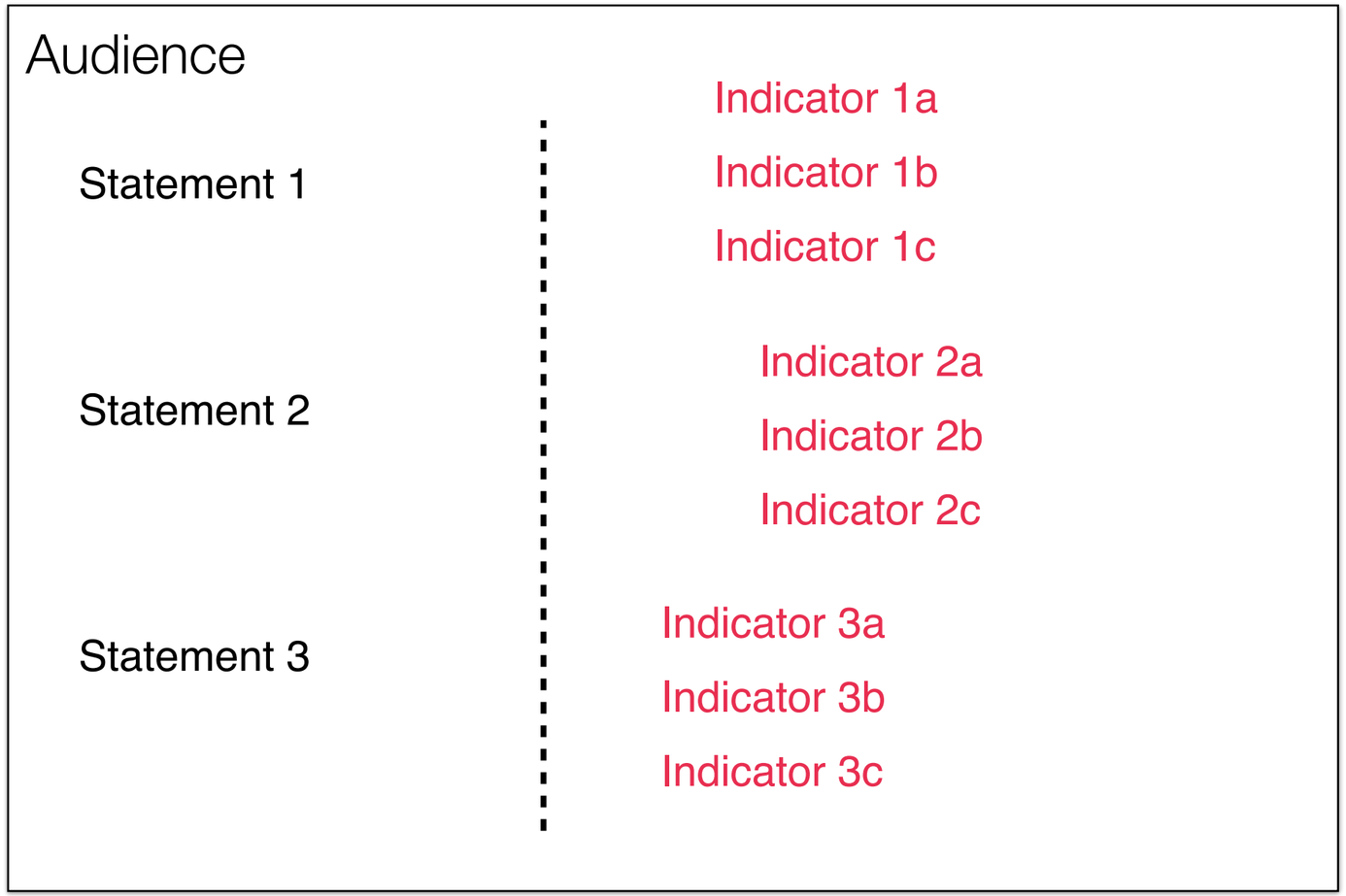
An Impact Narrative

Generic Version	Short Form
The issue that we addresses is significant	Significant Issue
We have an innovative and scalable business/service model based in a deep understanding of the issue	Right Model
Our product or service is valuable and appealing to stakeholders	**Appealing and Valuable**
Our product/service makes an impact on the problem it aims to address	**Impact**
We are efficient and effective, with a coherent management approach	Right Management

Add some goal statements



… and on to indicators

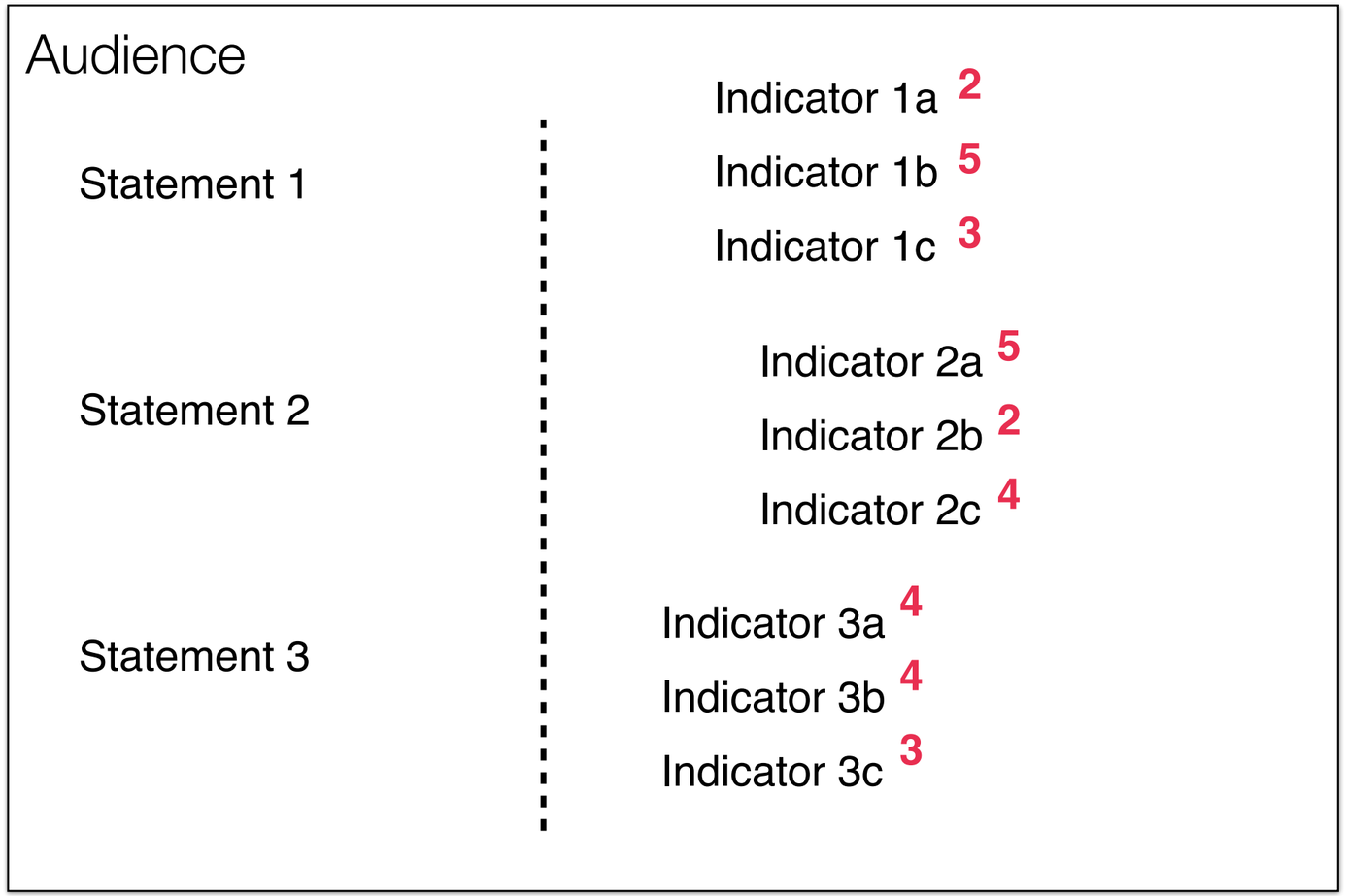


What Makes a Good Indicator?

Good indicators:

- Can be easily interpreted and communicated by others.
- Are reasonable to gather.
- Represent both qualities of a change (how well), in addition to the quantities (how much).
- Can give insights about where you want to go, not just current or past performance.
- Can be compared - such as a budget or last year's figures and/or a benchmark (if available).
- Are precise.

Information Value



5 - Essential i.e. “headline” or “elevator pitch” material

4 - Critical to make the full case for support

3 - Of interest but not essential

2 - Less important

1 - No value

If you like spreadsheets,
you'll like this

Reporting Snapshot Examples

Example 1

- Alzheimer Society Toronto (AST)
- PSW training for dementia care offered by AST as a revenue-generating program
- Audience information need: PSWs and their employers want to understand the value and impact of the training to make a purchase decision

Alzheimer Society
TORONTO

Our Role: The role of the Alzheimer Society of Toronto is to offer support, information and education to people with dementia, their families and their caregivers, to increase public awareness of dementia, to promote research, and to advocate for services that respect the dignity of the individual.

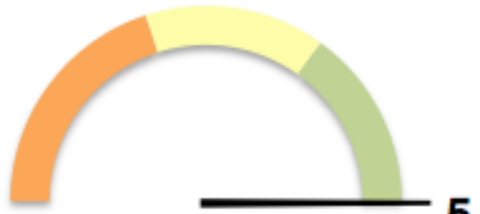
Better Training Leads to Better Care | Online Dementia Care Training Program for Personal Support Workers and other frontline healthcare providers

Alzheimer Society of Toronto's dementia-specific online certificate program trains personal support workers (PSWs) and other frontline healthcare providers in dementia care for people with dementia. Dementia care courses increase their knowledge of dementia and their ability to understand the underlying causes of behaviours. They learn to work as a team to develop person-centered strategies that address the underlying causes of behaviours to support the person and their family. The training leads to improved quality of care for the person with dementia, increased confidence and competence of PSWs, and may reduce the level of stress for families.

Long-term impacts include improved quality of care for the growing number of people who will be diagnosed with dementia, improved likelihood of continuing care at home, possibly reducing premature admission to long term care facilities and enabling individuals to age in place and reducing costs for the public health care system.

"Would you recommend ... to other healthcare providers

1 = would not recommend
5 = would highly recommend



Average rating from **5.0**

... graduates ... and in-person; cumulative totals

	2014 Q1	2014 Q2	2014 Q3	2014 Q4
online training	0	30	60	120
in-person training	120	240	360	480

Our Impact: Improved Quality of Care for People with Dementia

Leading Research Connects Better Training with Improved Quality of Care

Agitation was lower with both person-centred care and dementia-care mapping than with usual care. The most promising treatments were individually tailored behavioural interventions.

Chenoweth, L. et al. (2009). Caring for aged dementia care resident study (CADRES) of person-centred care, dementia-care mapping, and usual care in dementia: a cluster-randomized trial. Lancet Neurology, 8(4), p.317-325.

A formal evaluation of the Dementia Care Training Program in April 2013 revealed that "with better knowledge and communication skills, and armed with the different strategies and tools to manage responsive behaviours, graduates often times become more confident in providing consistent care. They also have a higher level of confidence in experimenting with the different care approaches that they have learned. Work satisfaction also increased as graduates found themselves communicating more effectively with other health professionals in the clients' care teams and contributing to problem-solving."

See **An Evaluation of Alzheimer Society of Toronto's DCTP and ESTP** at www.alzheimertoronto.org/reports.html

Our Impact: Reduced Levels of Stress for Caregivers

"My live-in caregiver told me that [the Dementia Care Training Program] has proven very successful with my parents. She is more confident because she understands why others behave in a certain way. If [people with dementia] don't understand the part that she does, she is more tolerant and gives them more information. It's interesting to see how it's paid forward."

- Daughter of a person with dementia, whose live-in caregiver is a DCTP graduate

Our Impact: Increased Confidence and Competence of PSWs

Before I attended the DCTP, whatever training I got from school was just the basics. What I learned from the training programs I can practice

Being a PSW can be stressful and there is high turnover in the industry. Of PSWs who have taken our training:

- 100% of graduates strongly agree that confidence and comfort have increased in providing care to person(s) exhibiting responsive behaviours (n = 32)

How will impact measurement help us?

In Practice…

- We have expectations about “what should happen”
- We look for feedback
- We adjust course
- It can be hard to identify and explain our assumptions about causal connections between things
- Especially in complex social, political and economic systems where not everyone has the same information
- Clear communication matters if you want to “Prove and Improve”

In Practice…

- **Strategy**
- Help teams work together to achieve a shared understanding of a project and its aims
- Make projects more effective
- Help identify and open up ‘black boxes’ in thinking

In Practice…

- **Data Collection**
- Help determine what needs to be measured (and what does not) so you can plan your evaluation activities
- Encourage teams to engage with the existing evidence base
- Act as the basis for claims about attribution

In Practice…

- **Communication**
- Quickly communicate a project's aims
- Bring the process of change to the forefront

In Practice…

- **Partnerships**
- Help with partnership working:
  - clarify roles and responsibilities
  - establish consistency around outcomes
  - train new staff or volunteers to replicate services

Prove

Accountability

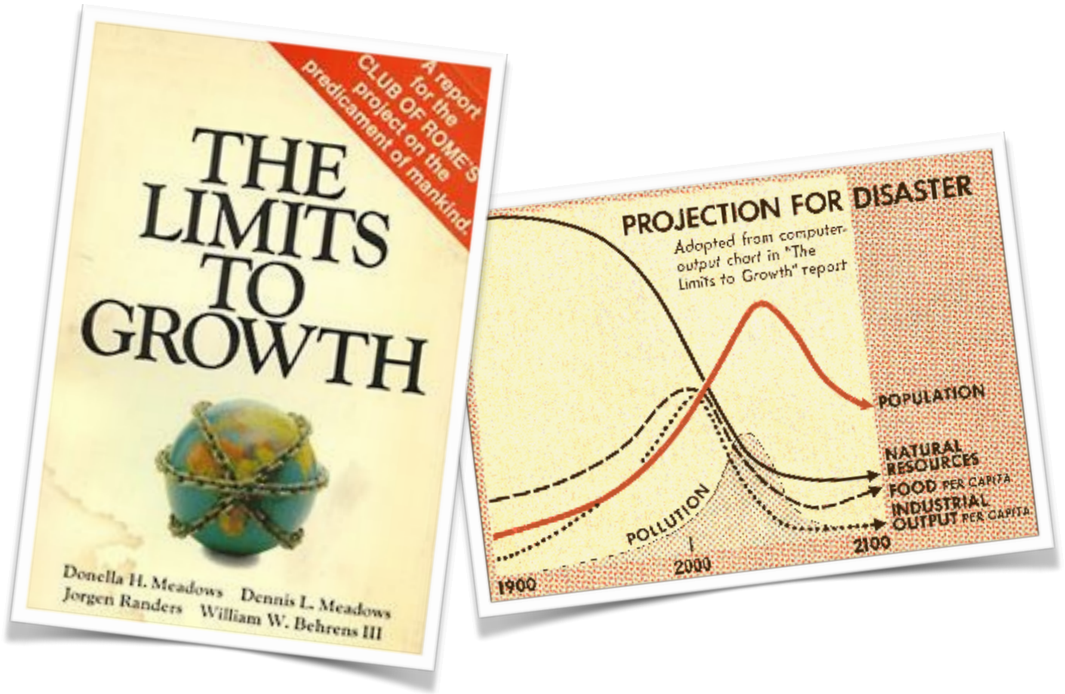
Summative

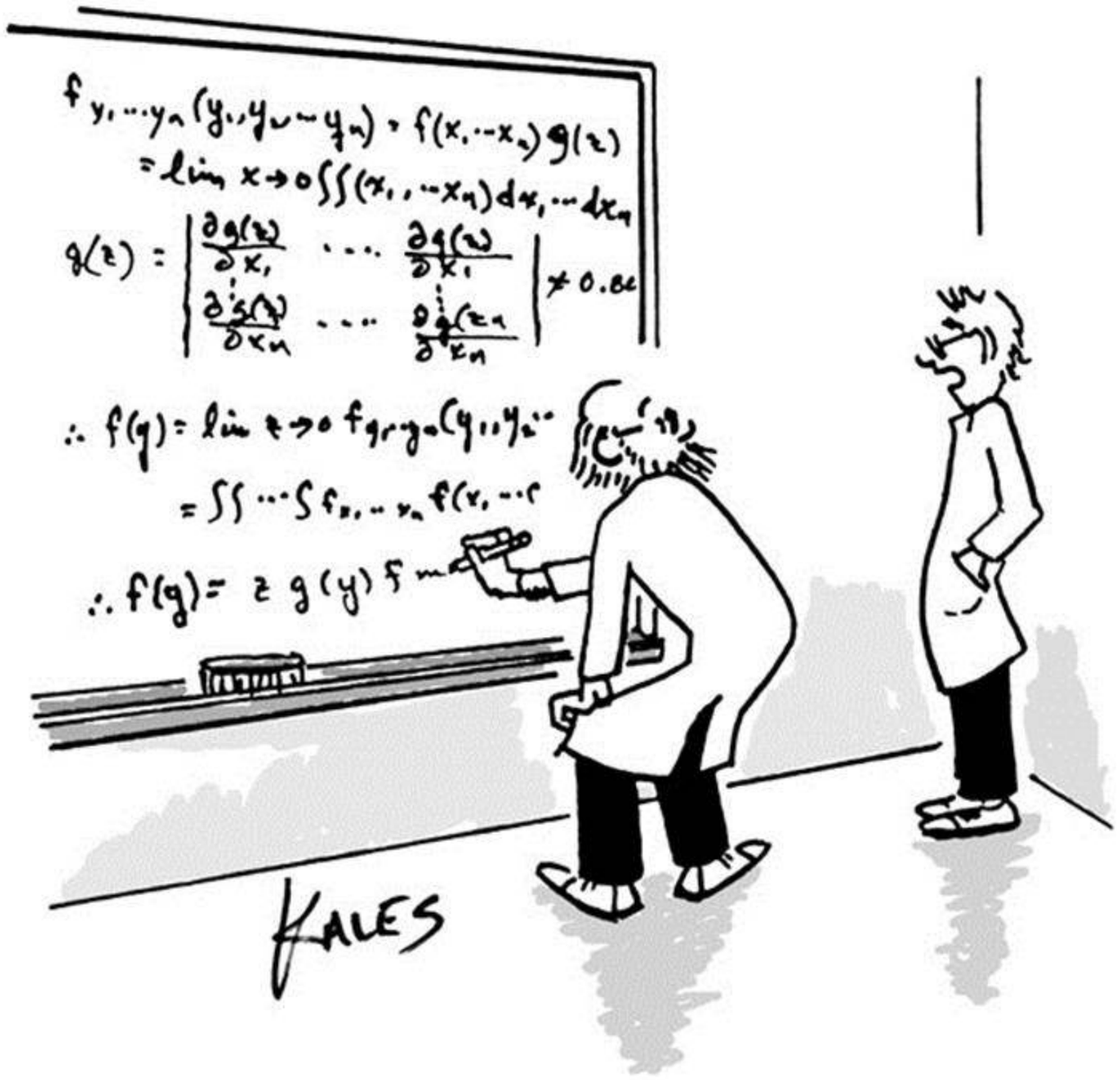
Improve

Management

Formative

Put Things in Context





"Now can you explain that with a parable?"
Paul Kales

Questions and Discussion

Contact us:
garth@junxion.com

www.junxion.com
www.demonstratingvalue.org

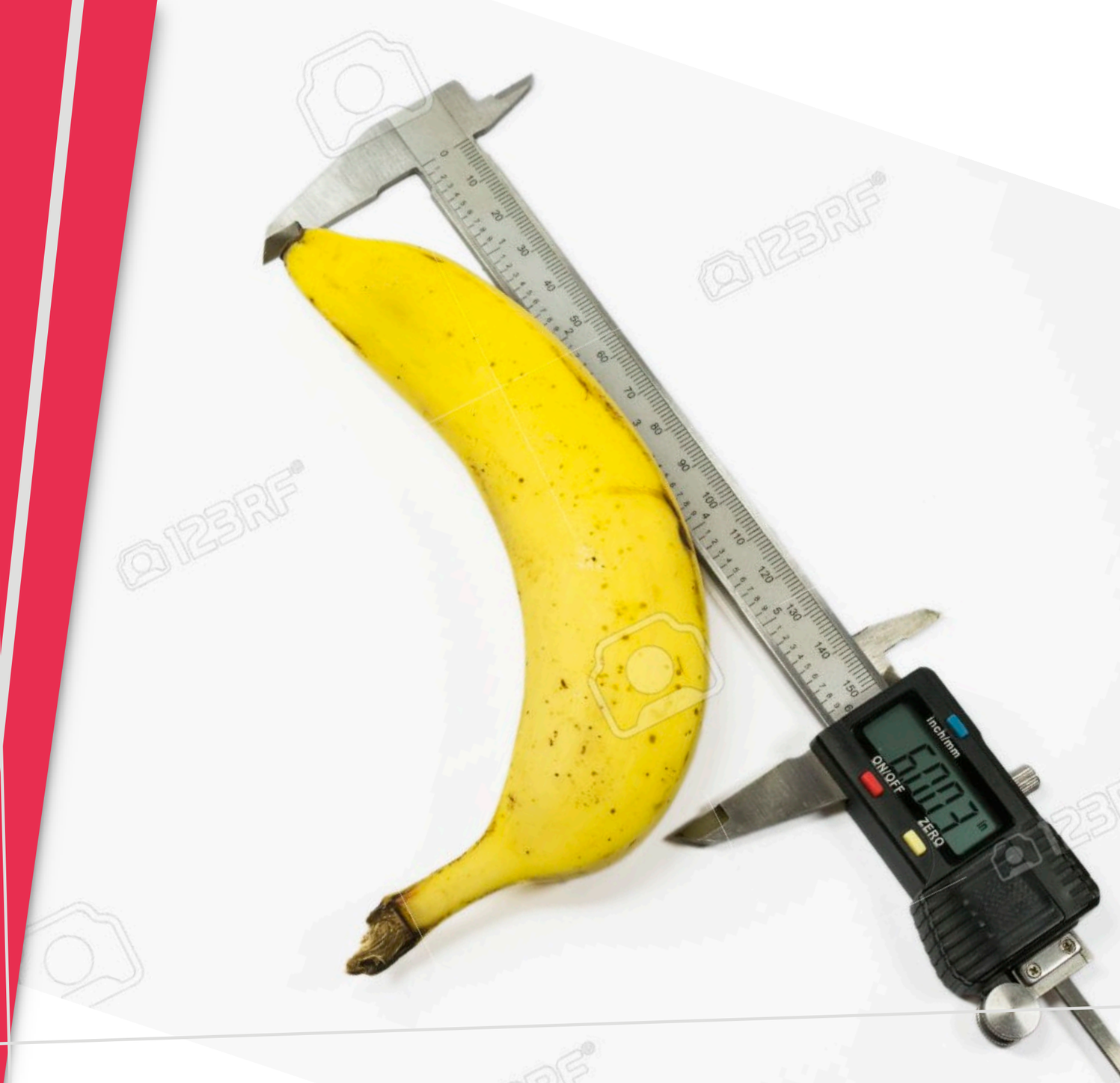
Practical Impact Measurement

Session 2 of 2: Collect and Use Information, Share Insights in a Performance Snapshot

Please have a pen/pencil and some paper at the ready for the workshop tasks!

junxion

VANCOUVER | TORONTO | LONDON



Success stories of the next economy

A burgeoning new economy is emerging from the grassroots in every city and on every continent.

Bold social entrepreneurs, courageous intrapreneurs, and concerned citizens of all ages, genders, and cultures are charting a path away from a failing economic model.

We are thoughtful peers and committed partners to those who already occupy the next economy and we're dedicated allies to the many who are striving to be a part of it.

We help leaders build the success stories of the next economy.

Certified B Corporation

Social Venture Circle

Our Approach

We help our clients to:

Articulate their **purpose**

Plan for **impact**

Share their **stories**

Demonstrate **accountability**

junxion

VANCOUVER | TORONTO | LONDON

COMMON APPROACH

TO IMPACT MEASUREMENT

Vancity

Community Foundation

Outline for today

- What is the minimum standard for impact measurement?
- How might we get started? (practical first steps)
- Let's look at some examples of Impact Snapshots
- Let's talk about Data Development Plans
- Start drafting an Impact Snapshot
- Questions

- **Goals for today:**
  - Get some useful ideas about the costs and benefits of different options for impact data
  - Take a structured approach to storytelling with data
  - Find some useful resources
  - Get inspired about measuring impact

Common Foundations: Essential Practices

Plan your change (e.g. Logic Model or Theory of Change)

Use performance measures (i.e. indicators that make sense for your organization)

Collect useful information

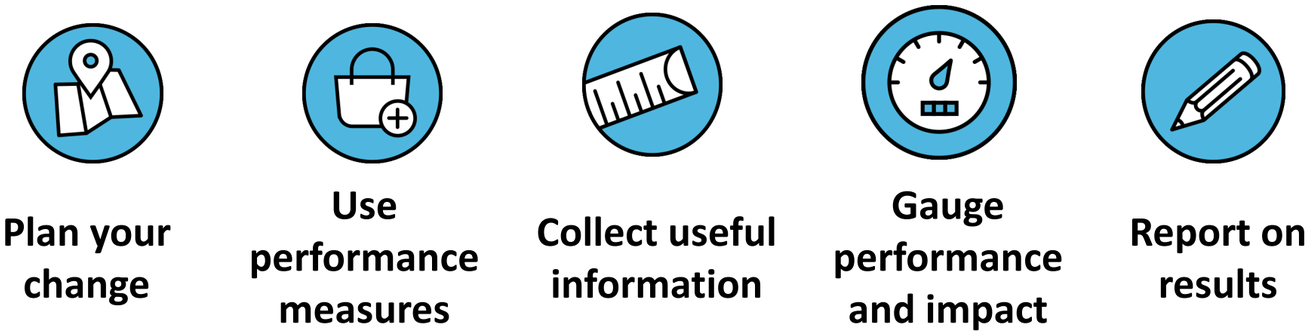
Gauge performance and impact

Report on results

Common Foundation: Report on Results	Explanation
Report on performance and impact every year.	Release regular public updates on the main things your organization has achieved and changed. This transparent account helps others to understand the impact you have made.
Choose reporting methods and communication styles targeted to your audience's needs.	Ensure that your reports are interesting, and relevant to your audience. Dense reports may be less effective than, for example, blogs, newsletters, bulletins, or postcards. (These should still reflect the scale and complexity of your work.)
Present results in a visually engaging way.	Illustrate your information, when possible and appropriate— such as by using graphs, charts, infographics, and images. This helps you to communicate your findings in a way that is easy for others to grasp.
Show the human stories behind your achievements.	Tell stories, to help you make an emotional connection with your audience and show them the difference your work makes to people's lives. These stories may be in the form of written case studies, video content, or audio clips.
Base your account on credible evidence.	Report as fully and honestly as possible on your impact, emphasizing your checks for accuracy and your balanced approach, and based on relevant and unbiased findings, and on reasonable interpretations of them.

The Common Approach

In general, if you follow the five Foundations:



Plan your change

Use performance measures

Collect useful information

Gauge performance and impact

Report on results

COMMON APPROACH
TO IMPACT MEASUREMENT

You can say you are aligned with the Common Approach to Impact Measurement

More information: https://commonapproach.org/

Build Capacity

Data and Monitoring Development Plan

Collect useful information

Management & Reporting Snapshot

Gauge performance and impact

Report on results

Information Map

Collect useful information

Use performance measures

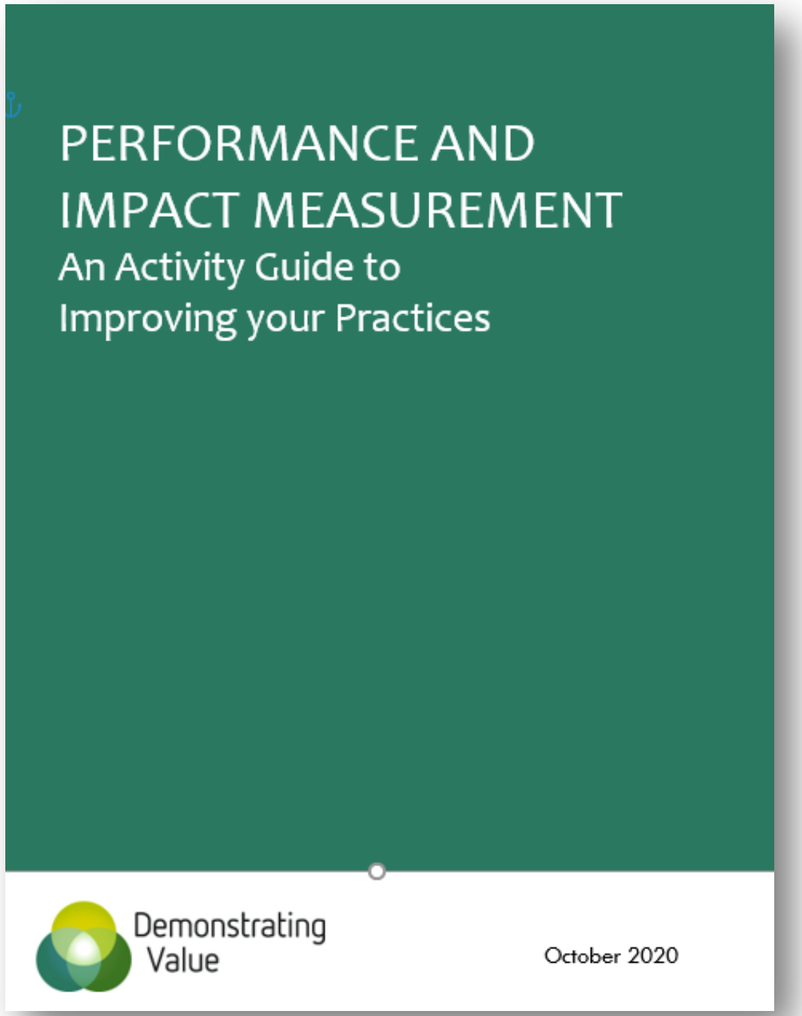
Capacity **to use** information

Capacity **to collect** information

Clear picture of information needs

+

COMMON APPROACH
TO IMPACT MEASUREMENT



Free workbooks: dvtools.org

Clear Milestones

ACTIVITY

1. Mapping

What do you do? Why is it important?
What you need to know and show?

2. Prioritize monitoring needs and actions

3. Develop snapshot content

4. Implement monitoring and reporting improvements

OUTPUT

Information Map

Use performance measures

Collect <u>useful</u> information

Data and Monitoring Development Plan

<u>Collect</u> useful information

Management & Reporting Snapshot

Gauge performance and impact

Report on results

Impact Snapshots

"This brand has a clean balance sheet, a lively marketing plan with tasteful notes of originality, and a strong fiscal-year finish."

- **Dashboard:** A Dashboard displays indicators (i.e. performance measures, metrics and data points) for an organization, department, team or process. It is typically an internal tool that is directed to management, a senior executive team or an advisory/governance board. Indicators are organized around objectives and include key performance indicators ('results') and key success factors ('what drives the results').

Your Logo

Performance Snapshot

July 2018

		Fiscal 2018		
	Indicators	**Annual Target**	**Prorated to current month**	**YTD Current**
Area 1	Indicator 1a			
	Indicator 1b			
	Indicator 1c			
Area 2	Indicator 2a			
	Indicator 2b			
	Indicator 2c			
Area 3	Indicator 3a			
	Indicator 3b			
	Indicator 3c			

Interpretation of Indicators

Ei pro essent scribentur, solum impedit senserit per ut, ex cum nemore quaeque. Sea eu aperiri diceret accusam, sit ad ullum

praesent.Petentium voluptaria te sea, usu scripta feugiat te. Vel modo partiendo consetetur eu. .Petentium voluptaria te sea, usu scripta feugiat te. Vel modo partiendo consetetur eu.

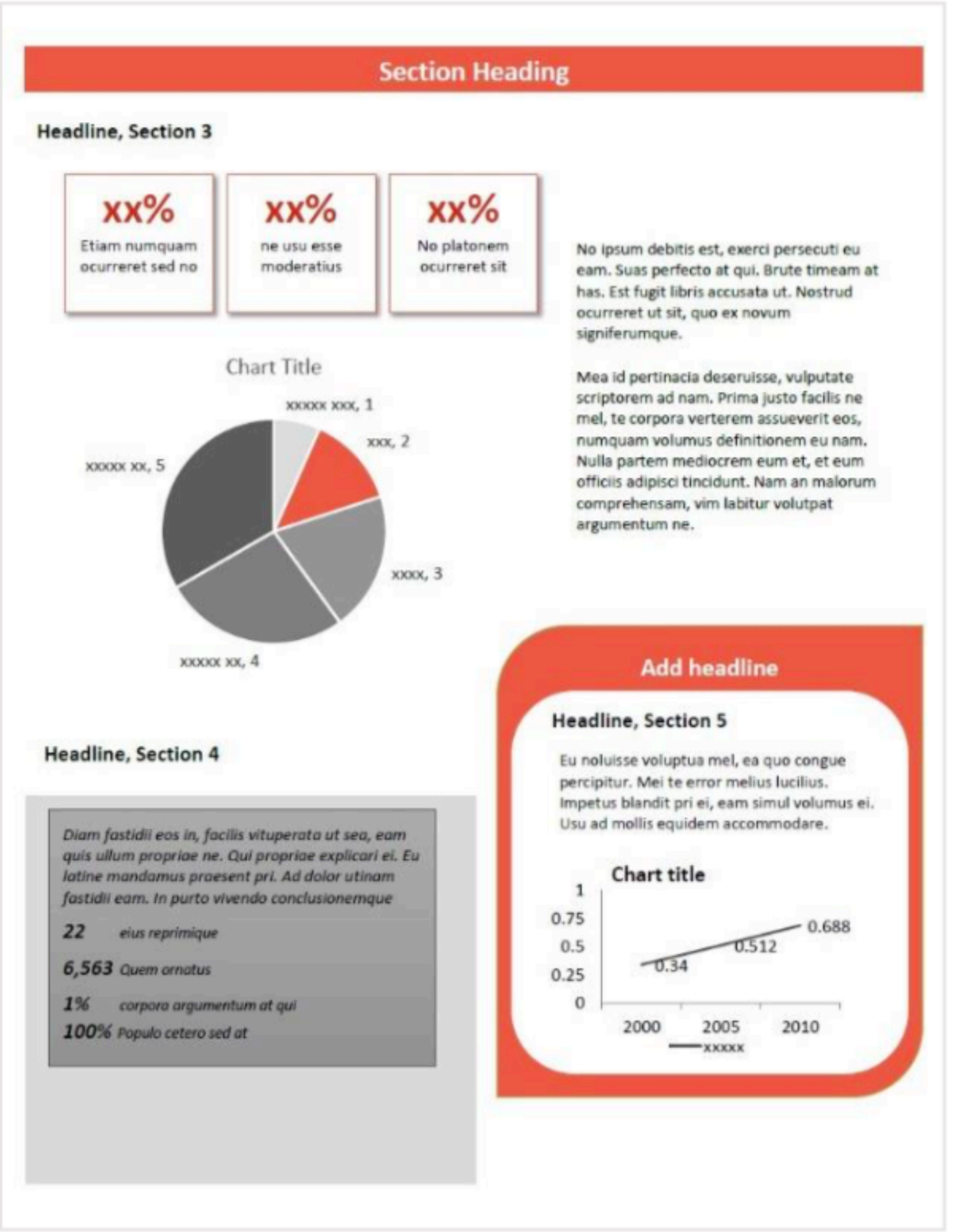
Impact Story

Diam fastidii eos in, facilis vituperata ut sea, eam quis ullum propriae ne. Qui propriae explicari ei. Eu latine mandamus praesent pri. Ad dolor utinam. Reque etiam solet quo cu, errem doming in mel. Ei pro essent scribentur, solum impedit senserit per ut, ex cum nemore quaeque. Sea eu aperiri diceret accusam, sit ad ullum

praesent.Petentium voluptaria te sea, usu scripta feugiat te. Vel modo partiendo consetetur eu. .Petentium voluptaria te sea, usu scripta feugiat te. Vel modo partiendo consetetur eu.

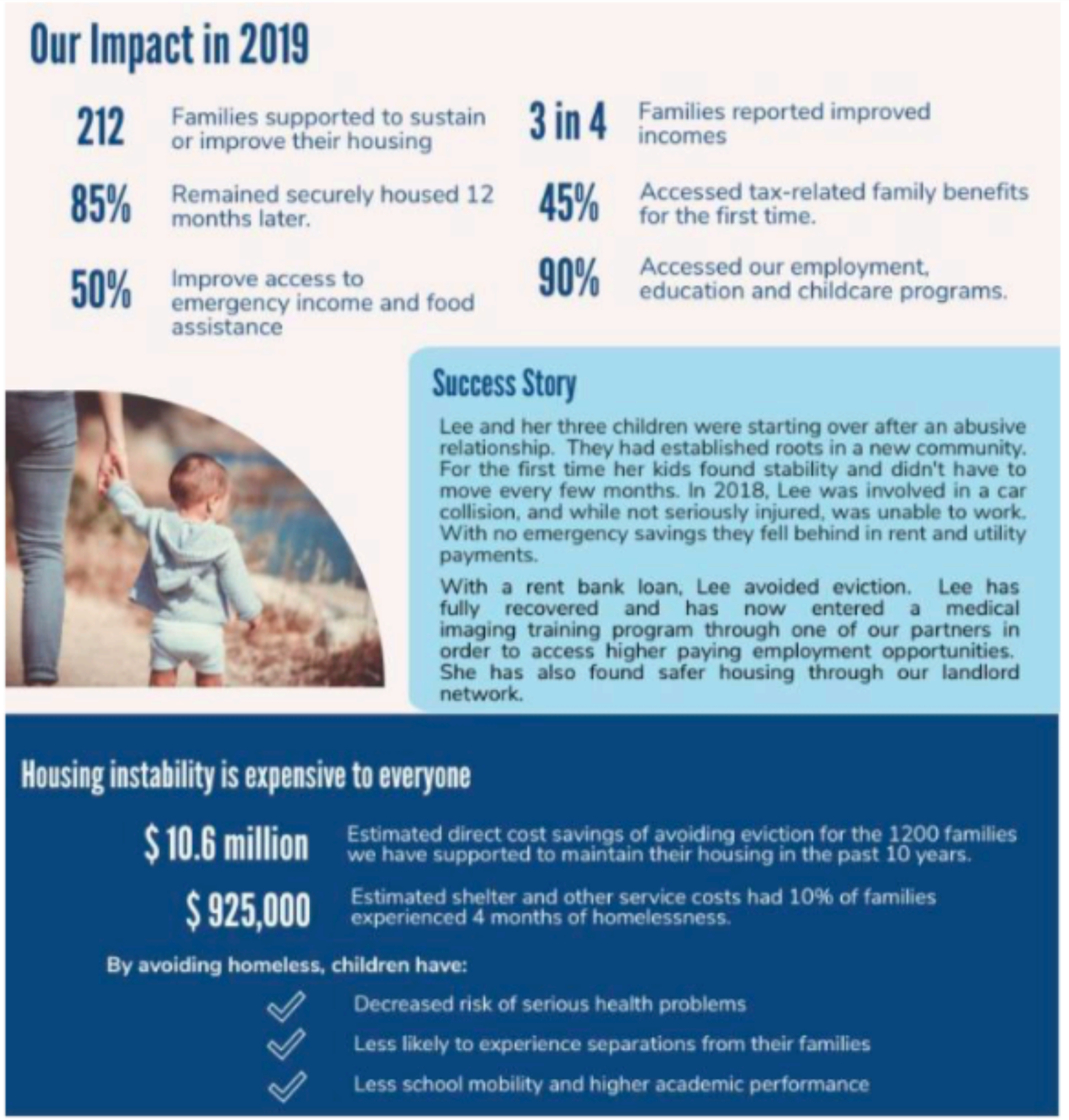
Different types of performance snapshots

- **Infographic:** An Infographic is a representation of information that is graphically designed to make data easily understandable at-a-glance. It is mainly used as a communication tool to external audiences, often as a small poster that can be displayed. The information is presented in a fun and eye-catching way.



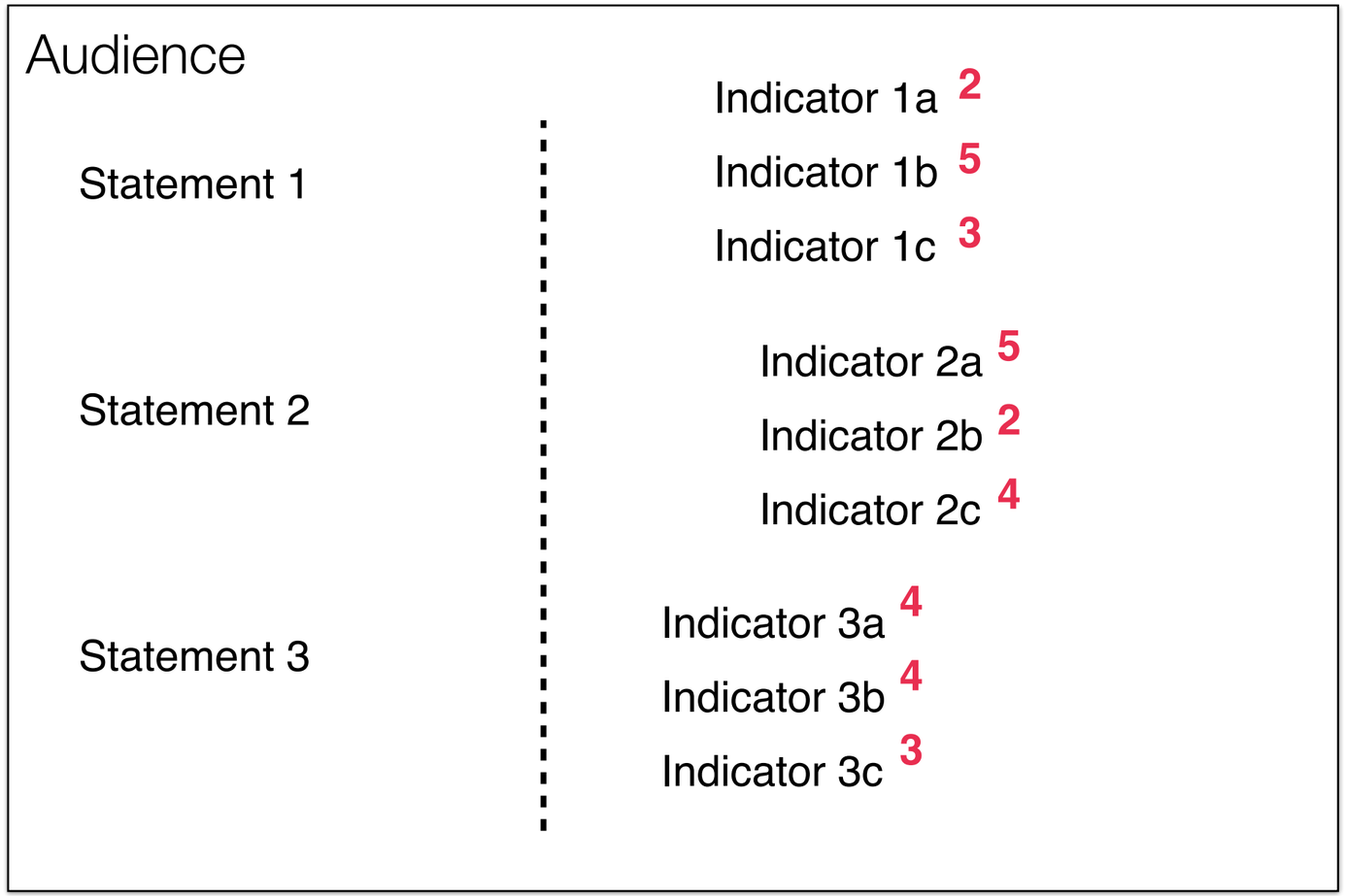
Different types of performance snapshots

- **Impact Report:** An Impact Report may be a section of an annual report or a stand-alone report that clearly communicates your mission and impact. The length can range from a few pages to more than a dozen; you can go into more detail about your impact than in an Infographic. The information is still presented in an eye-catching way with a balance of photographs, figures, metrics and text. It is mainly directed to an external audience.



Exercise 2:
Creative Design!

Audience & Information Needs



5 - Essential i.e. “headline” or “elevator pitch” material

4 - Critical to make the full case for support

3 - Of interest but not essential

2 - Less important

1 - No value

Sketching your snapshot

- Confirm, in your mind, the audience you are designing for and their specific information needs. Do not try to make your design be all things to all people!
- Sketch 4 or 5 main content sections on the page, possibly including:
  - A title and/or headline
  - A primary image (photo, illustration, chart)
  - A secondary image (photo, illustration, chart)
  - A paragraph of text
  - A bullet list in larger type
  - A ‘big number’ (e.g. “**95%**” of something, or a dollar figure)

Snapshot Example 2

- Comox Valley Farmers' Market
- Organizes the market to build community relationships and food security
- Audience information needs:
  - Local municipality: local economic impact, demographic served, to make funding and permitting/zoning decisions
  - Current and prospective vendors: business opportunity, market integrity, to make decision to purchase a spot/stall
  - Market shoppers: market experience, market integrity, to make a decision to patronize market vendors

Comox Valley Farmers' Market Overview

Market Mission/Vision:

The CVFM is about food and farm and garden products that are produced and/or harvested, locally, with caring hands. It is about social interaction between consumers and local farmers, producers and fishers. It is about community, education and about promoting rural business. And, we will do all of this in a fun, friendly, and safe, family oriented environment.

Vendor Criteria:

All products (except fish) must be grown or produced in the Comox or Strathcona Regional District, and must be an agricultural or food product. Vendors must produce what they sell.

Photo: Comox Valley Farmers' Market facebook page

The Market Numbers

Annual Budget (2012):	**$74,400**
Budget from Operations:	$65,900
	95%
Grants, donations, etc:	$3,500
	5%
Budget growth from 2011:	19.7%

Vendor turnover rate:	10%
Vendor growth rate:	4%
Proportion of regular* vendors:	59%
Registered vendors:	88
Average number of vendors:	38

*Regular vendors attend the market most weeks.

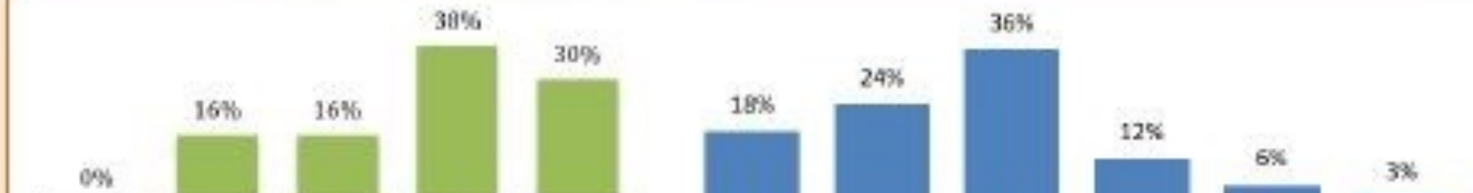
Years in Existence	over 20
Market days per year:	67

The farmers' market is included in the *Vancouver Island Coast Regional Agriculture Framework for Action* and *Comox Valley Economic Development Society's Agri-Tourism Plan*

Customer Demographics

Customers traveled an **average of 31 km**

85% of customers traveled



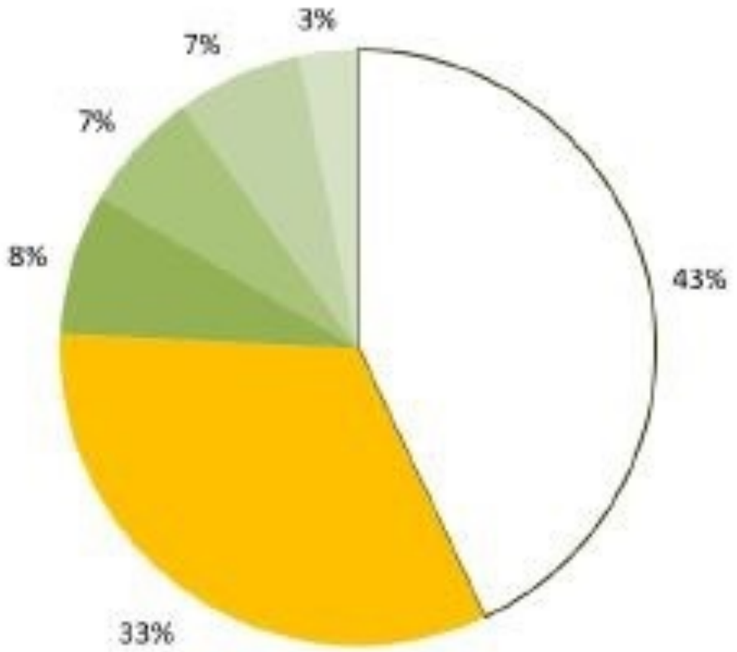
Comox Valley Farmers' Market Overview

72% of vendors travel under 20 km to the market

76% of farmer sales volume is from local sales

82% of farmer product sales revenues come from farm direct sales channels (farmers' markets, CSA subscriptions, and farm gate sales)

Market Vendor Income from Local Sales by Channel



Vendor Attraction & Retention

Vendors value the market and contact with other vendors for social, economic, and business development reasons.

We can taste each others' products
Trade products
Help each other set up
Share growing tips, discuss concerns
Customer referrals
Learn about other opportunities or venues

Data Development Planning

Audience & Information Needs

Audience		Value	Cost
Statement 1	Indicator 1a	2	5
	Indicator 1b	5	2
	Indicator 1c	3	4
Statement 2	Indicator 2a	5	4
	Indicator 2b	2	4
	Indicator 2c	4	3
Statement 3	Indicator 3a	4	2
	Indicator 3b	4	5
	Indicator 3c	3	3

Information Costs and Benefits

- Internal or external source
- Primary or secondary research
- Frequency of collection, perishability of data
- Ready to use ‘raw’, or requires significant cleaning, interpretation, summarizing, or expert analysis
- Staff time required for collection and handling (incl. appropriate systems and policies for personal and/or private data)

Don’t get hung up on the ‘perfect’ set of indicators

Data Development Plan

Consider Your Evaluation ROI		Ease of Collection		
		Difficult	Medium	Easy
Importance of Information	High	Consider an alternative	Worth the effort	Definitely!
	Medium	Probably not worth it	If you have time	Worth the effort
	Low	Ignore	Probably not worth it	Probably not worth it

Information Sources

	Qualitative	Quantitative
Primary	Surveys, interviews, focus groups Listening to and recording peoples' stories "Action research"—being part of a group working on something	Observations, counts, or surveys of people or things in specific places or situations e.g. "how many of x are in y" (accessible bathrooms in downtown, mailboxes in city, people over age 70 on the #20 bus at 3 pm, etc.)
Secondary	Social media and online news (Google news search, Trends search) Print and digital archives at the library Contracting 'issue experts' or academics for literature review or policy analysis (make use of volunteer students through programs like Riipen!)	StatsCan Nonprofit whitepapers and annual reports Regional/municipal economic or social planning council data Health authorities Industry associations Professional analysts/insights groups

Audience & Information Needs

Audience		Value	Cost	Source
Statement 1	Indicator 1a	2	5	Survey
	Indicator 1b	5	2	Survey
	Indicator 1c	3	4	StatsCan
Statement 2	Indicator 2a	5	4	Quickbooks
	Indicator 2b	2	4	Quickbooks
	Indicator 2c	4	3	CRM
Statement 3	Indicator 3a	4	2	Quickbooks
	Indicator 3b	4	5	CRM
	Indicator 3c	3	3	Interviews

Your Impact Data Toolbox: Pros and Cons

(my completely biased and subjective opinions, use what you know how to use)

Enterprise Systems

Many specialized social impact measurement software platforms exist e.g.:

- Sametrica
- Rippl
- ImpactableX
- BINGO
- SocialSuite
- SoPact
- Sinzer
- ImpactMapper

… and the list goes on. Each has different levels of functionality to support collecting, analyzing, and sharing impact data.

Pros

- Automation is worth the cost when scale and complexity go beyond what is practical with DIY solutions in Sheets / Airtable (don't wait too long!)
- Many platforms come with support and user community around standards-based reporting, sophisticated analyses and data handling

Cons

- Often built around a funder-driven use case
- Higher costs for initial configuration, ongoing license and maintenance fees
- Sales reps can answer "can it do XYZ", cannot answer "is XYZ the best approach for us?"

Google Apps / MS Office 365

Pros

- Sheets / Excel is very flexible and adaptable, good for prototyping basic reports and systems
- Slides / PowerPoint is pretty user friendly for entry-level designers
- Both offer granular user access and allow instant sharing with public web links
- Huge user base, well-documented
- Immense number of integrations and add-ons for getting data in and out and extending functionality

Cons

- Can lead to myopia around other, better ways to do things
- Quickly gets fragile as scale and complexity of systems and databases increases
- Sheets / Excel is not an actual database (i.e. doesn't handle 1:many, many:many relationships very well)
- Slides has significantly more constraints for image placement, themes, and layout compared to PowerPoint, and neither are a great substitute for actual print publication design or web site design tools

SurveyMonkey

Pros

- E-mailed collectors! So much better than the data matching challenges introduced by survey web links
- Good survey logic/branching tools
- Question suggestions and templates

Cons

- Pro version is moderately costly, although nonprofit discounts are available

Airtable

Pros

- Nice user interface and overall design
- Nice granular control over data access and permissions
- “Database light”, handles 1:many lookups quite elegantly
- Templates for many use cases
- Cheaper and simpler than many other CRM or hosted database alternatives
- Many integrations for data import and export available (e.g. Zapier) if you are comfortable configuring them (moderate skill level required)

Cons

- Not yet a huge user base of nonprofits so solutions and examples tend to be more small-business oriented
- Not all apps / extensions are well-developed or well-documented yet, can lead to ‘stubs’ (charts, summary tables) that can’t easily be exported or shared
- Not quite as simple as Sheets for getting “raw data” in and out

Piktochart

Pros

- Nice user interface and overall design
- Nice templates for ‘infographic’ style one-pagers
- Integrates data directly from Google Sheets

Cons

- Some limits on amending or duplicating templates

InDesign (and Adobe Suite)

Pros

- The industry standard for print publication design—most pro designers will know how to work with it
- Maximum flexibility for typographical styling, exact matches for brand colours, high resolution image editing

Cons

- Not suited for DIY; moderate to high cost for professional designers
- Does not readily handle charts/visualizations from external sources (i.e. charts from excel must be rebuilt in Illustrator, pretty much from scratch)
- Does not handle “live” data sources very well
- Not well-suited for producing screen versions (other than ‘flat’ images or PDFs)

Custom web design

Pros

- Best for anything where geographical map data is the primary data visualization
- Best for cases where people will primarily view your report/snapshot on mobile devices
- Best if you want detailed analytics about who is interacting with your report data

Cons

- Higher upfront costs for development and ongoing costs for maintenance

Questions and Discussion

Contact us:
garth@junxion.com

www.junxion.com
www.demonstratingvalue.org