

ACTIONABLE IMPACT MANAGEMENT

AIM VOLUME ONE | **GROUNDWORK** | ACTIVITY GUIDE

A FRAMEWORK FOR...
SOCIAL IMPACT STRATEGY,
MEASUREMENT, &
DEMONSTRATION

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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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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.

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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 of 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

VISION, MISSION, & GOALS
PROGRAM STRUCTURE
THEORY OF CHANGE
MANAGING CHANGE

VOL. 2 METRICS

MEASURE WHAT MATTERS
STANDARD METRICS ALIGNMENT
METRICS DATA PIPELINE + TOOLS

VOL. 3 DATA

DATA CAPACITY
DATA TOOLS
DATA STRATEGY

VOL. 4 COMMUNICATION

EVALUATION
STORYTELLING APPROACH
QUALITY PRINCIPLES
WHAT TO INCLUDE IN AN IMPACT REPORT
REACHING AUDIENCE

VOL 1 | GROUNDWORK IN THIS VOLUME



VISION, MISSION, & GOALS

OVERVIEW

VISION OVERVIEW + ACTIVITY

MISSION OVERVIEW + ACTIVITY

GOALS OVERVIEW + ACTIVITY



PROGRAM STRUCTURE

OVERVIEW

ACTIVITY



THEORY OF CHANGE

OVERVIEW

ACTIVITY

TEMPLATE



MANAGING CHANGE

OVERVIEW



GLOSSARY

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

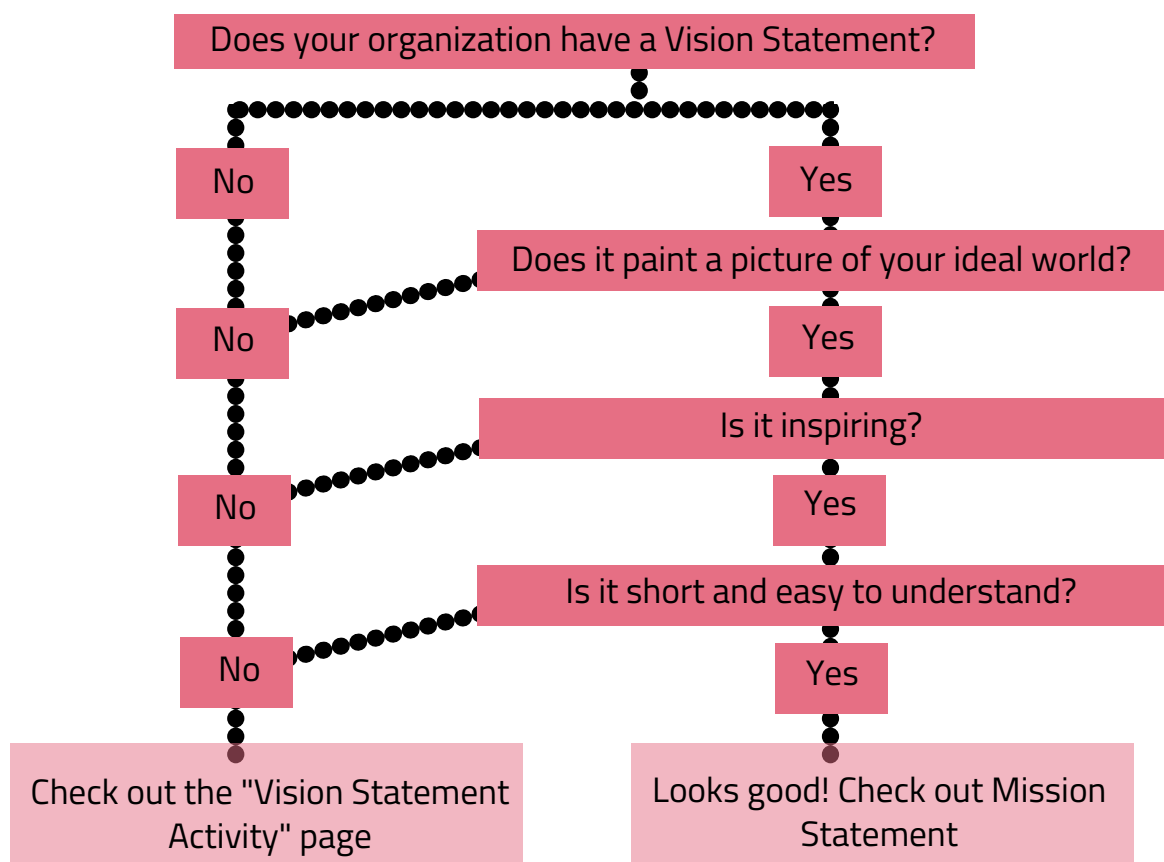
i. VISION STATEMENT

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:



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.

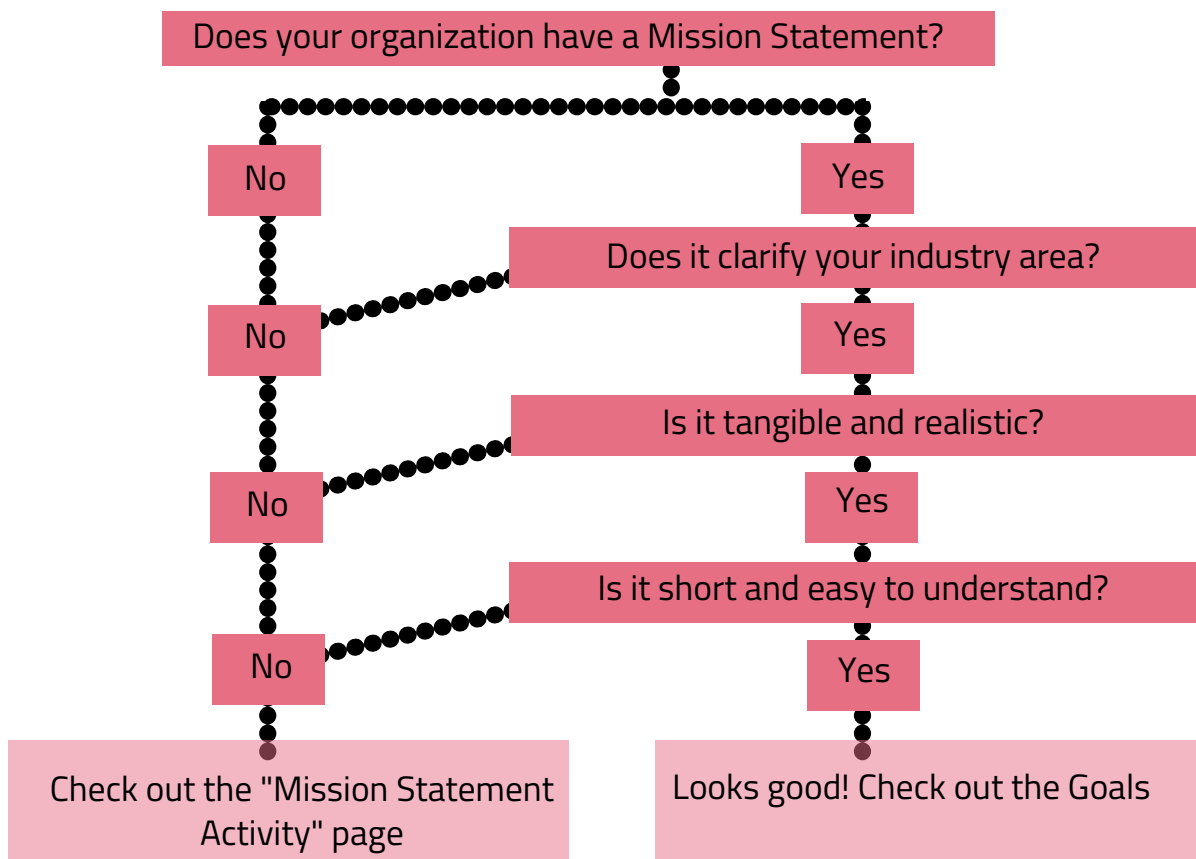
ii. MISSION STATEMENT

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:



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

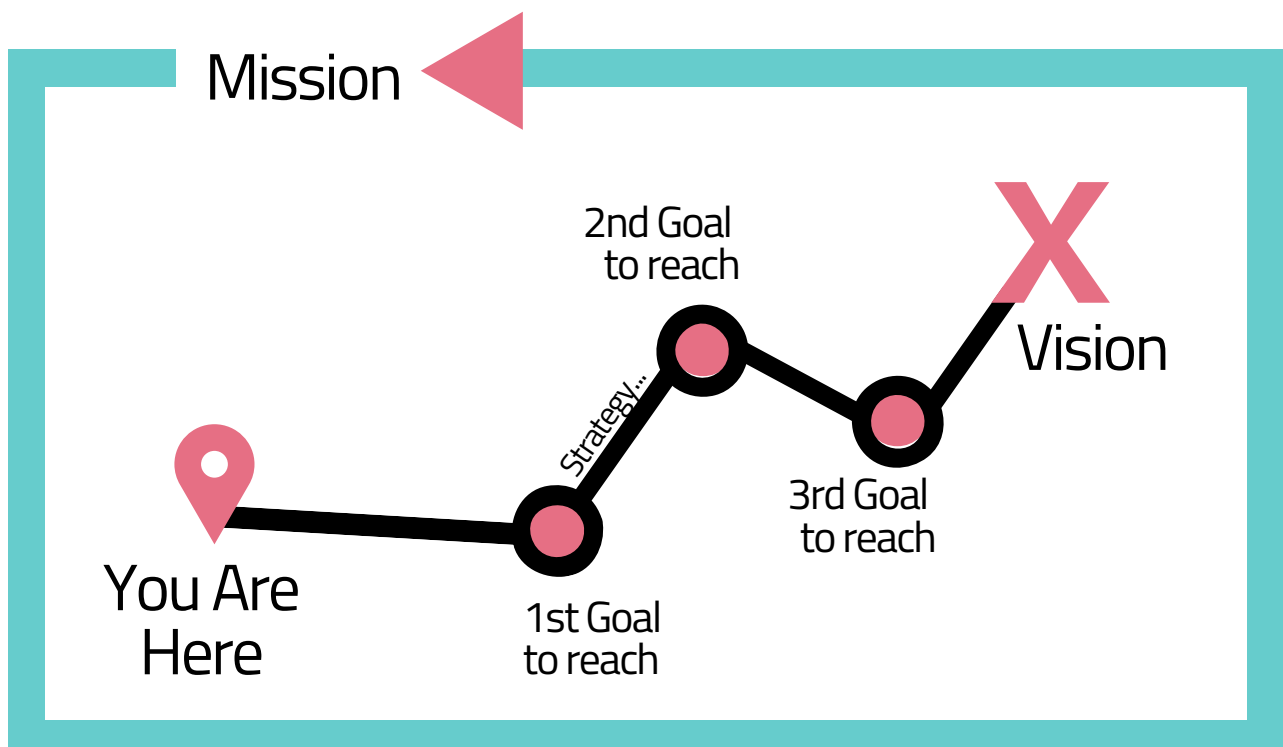
When goals are clear and easy to understand, they are powerful tools that align every area and every individual within your organization towards a common Vision. Familiarity and understanding of the big picture empowers individuals within the organization to recognize the relevance of their work to the 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



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.

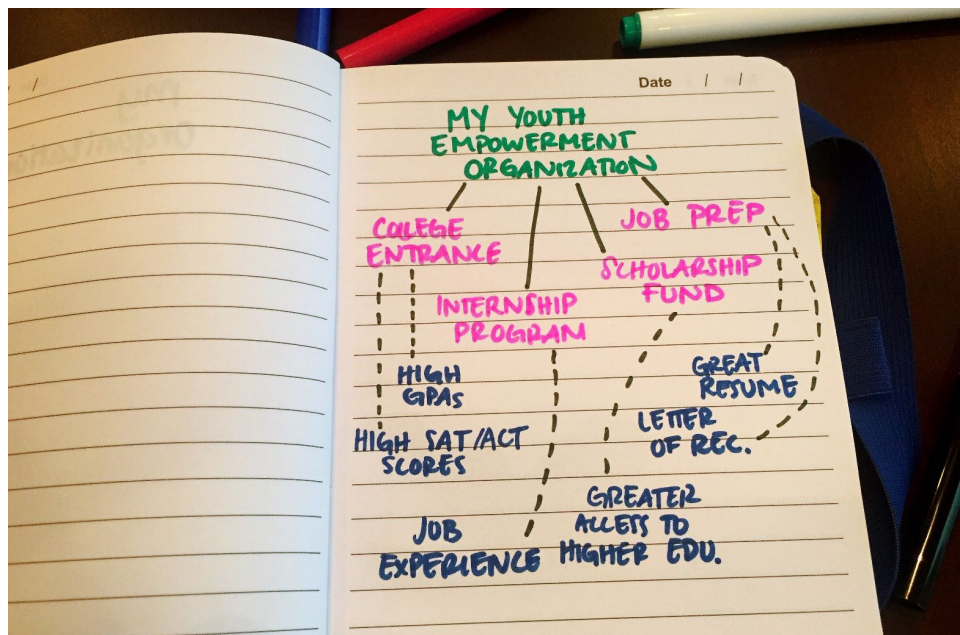
This concept sounds simple. Do not be fooled. Many organizations have gotten stumped by this section. Don't be alarmed if you find yourself in a similar situation. Glance back at your Vision, Mission, and Goals for inspiration if you do get stuck. For example, a community organization that funds local 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.



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