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A Guide to **Measuring Impact**

Claire Warner, a Coach working with charities to improve their Comms & Fundraising, gives her advice and suggestions on how charities of all sizes can approach measuring their impact.

Impact measurement and reporting seems to be one of the latest charity reporting trends. Not so long ago, impact reporting was something you just did as a contractual obligation if you were a recipient of Lottery or Government funding.

However, measuring impact i.e. "measuring whether you're doing what you say you're doing and if so, how well" should be a fundamental function within any charity. Demonstrating and effectively communicating impact is the best way to articulate why your charity does what it does and why people should engage with you.

WHAT DO WE MEAN BY IMPACT?

The Oxford English Dictionary defines impact as "a marked effect or influence".

A charity's impact is what it wants to achieve. What influence or affect it wants to bring about, the overarching reason for its being and its raison d'etre.

Impact sits alongside your charity's Theory of Change – What do you want to change and how do you want to achieve it. The Theory of Change helps you articulate your overall aim. While these may not be terms you've used before, every charity has a Theory of Change. Many express these within their Vision and Mission.

Charity success is life-changing: it's ending poverty, it's finding the cure, it's preventing abuse.

But these are huge aims, which require building blocks beneath them to break down the over-arching aim into more manageable and measureable units.

The difference you are making - the effects of the charity's outcomes, outputs & activities (Impact)

The changes, benefits, learnings or other effects that result from what the charity makes, offers or provides (Outcomes)

The services, products, facilities, interventions, number of beneficiaries that result from the charity's activities (Outputs)

Money donated, time spent, number of staff, partnerships, marketing materials etc. – the resources the charity need to deliver the outputs (Inputs)

BIG

Lottery Scotland has created a really simple yet effective infographic to help explain the interrelationship between these.

WHY MEASURE IMPACT?

Why would /should charities measure impact? (or possibly, more importantly, why not?) This is a no-brainer. How do you measure success? How do you know you're bringing about the change you want to effect?

Measuring your impact simply means measuring and demonstrating how well you're achieving your aims. The following four questions should be fundamental in the operation of your charity:

1. Are we accomplishing the change we set out to achieve?
2. How do we know and how can we prove it?
3. What changes occurred as a result of our intervention?
4. What unexpected or unplanned effects did our actions have?

> *How do you know you're bringing about the change you want to effect?*

In reflecting on these questions you need to consider whether you had an effect on people, organisations, and/or on the political, economic, social or physical environment?

Measuring your impact can give you crucial information which you can use to make decisions and it helps you to:

- know what has changed and what works about an intervention, activity or service
- know the extent and intensity of the change you have brought about
- benchmark and make comparisons of yourself and others
- learn and make improvements and inform future direction and investment
- test assumptions
- provide evidence of value for money or return on investment
- detect any unintended impacts
- not just prove but improve

WHO ARE YOU MEASURING FOR?

There are many stakeholders whom have a vested interest in the impact of your organisation. Therefore, measuring the right impact for the various stakeholders is key.

You, as the charity leaders, should want to know how well you're delivering against your vision, mission and aims – you might well be delivering services, but are they the services your beneficiaries need? Are they the right aims to deliver the objectives? Trustees will want hard evidence on which to make decisions.

Staff want to know that the work they're doing is valuable and making a difference. Proof can boost moral, improve effectiveness and efficiency and demonstrate reasons for organisational decisions.

Funders and Donors want to know what their support is helping to achieve. They want to know how their money / resource is going to be used and what it is going to enable.

Commissioners and Referrers want to know how well and how efficiently your service / product could deliver benefits to their patients / service users

Partners and allied professionals want to know where you can add value to each other and share knowledge and information.

Effective communication of your impact to a wider audience will help raise your charity's profile in your sector, locality, local government and with the wider general public. This, in turn, could increase the number / calibre of staff, volunteers, supporters, donors, commissioners and allied professionals working with you.

WHAT SHOULD YOU MEASURE?

Firstly, you need to decide what information you need and what information is useful in order to demonstrate or prove that you are delivering what you set out to deliver, to improve your activities, products and/or services, and to measure how close you are to achieving your aims.

Who is the information for – who are your stakeholders? What are the stakeholders going to do with the information – are they going to make decisions based on it? Are they going to use it to leverage more resource or support? Are they going to use it to increase awareness?

Or something else? Identifying these will help define the measures.

Your intial decisions on what to measure need to be influenced by the purpose – *why are you monitoring and what do you want to be able to see, do, decide or communicate as a result? This is fundamental.*

If your trustees are going to be asked to make decisions on the back of the measurement, what information do you want them to have to make a well-informed decision.

> *Who is the information for – who are your stakeholders?*

Some charities' impact measurement is funder-led. There are many instances where funders require reporting on outcomes that the charity does not include within its existing monitoring. It is important to highlight the reporting requirements of any funder before the project starts, then these can be incorporated within the data collection. If your charity is reliant on large-scale government funding (or similar) you may have to accept that the ability to answer a funder's specific request for information is 'useful'.

Secondly, you need to identify what input you need in order to gain the information.

For statistical / quantitative information, can your system tell you everything you need or do you need separate collection methods? If so, who is going to manage the process and how will the results be recorded? How many people do you need to give answers / opinions? What is a useful sample size? Do you need stories? Who is going to collect them? Do you have the resources available to collect the information? Do you have a template you can use so that your responses are comparable?

Thirdly, you need to make sure that any measuring you set up isn't going to take more time and resource to deliver than your charitable activity itself – it needs to be proportionate and it needs to be useful.

Collection does NOT need to be complicated and does not need to be expensive.

HOW TO COLLECT THE INFORMATION

You can collect the information in many different ways. The techniques need to be appropriate to the individual measure. You also need to get information from different view points: an individual's own assessment of the impact of an intervention on their life may be hugely different to the assessment of the professional delivering the intervention. Both viewpoints are useful.

If possible, you need to set up your computer systems to collect as much of the number-crunching quantitative data for you. Number of users, number of visits/interventions, number of staff, number of hours are all easily recorded and broken down.

The qualitative, word-based information helps paint a picture – put a face to a story. Methods you can use to collect include:

- case study
- story
- interview
- online survey
- focus group
- observations
- ongoing assessment
- check lists
- questionnaires etc.

Make sure that you're clear about whether or not you need to ask open or closed questions to get the data you need. Make sure that the method of collection is consistent – you can't compare information from one set of beneficiaries who filled in a questionnaire on their own with the information from another set who sat 1-2-1 with one of your staff who teased out answers.

Start off small and simple, get it right, and then grow it in the future.

It does not need to be complicated and expensive. Choose measures and methods that are appropriate to your charity's size, scale and available resource. If all you need is to monitor the number of attendees, a simple bar and gate tally taken at each session, later recorded on a spreadsheet will suffice.
It does the job and doesn't eat into valuable service delivery time to undertake. Think about what forms / questionnaires / systems already exist that could be tweaked rather than starting from scratch. There are free online resources to help you collect information digitally. Providers like SurveyMonkey enable you to quickly and easily create cheap / free online surveys or look at the capabilities of your website and see if you can add any questionnaires or forms.

It is easy to get carried away with a particular measure or collection method. Make sure that you always check that the measure actually demonstrates something useful. If not, ditch it and save time and resource. And remember, just like you would never try to do everything the first time round in the delivery of a service, your impact measuring needs to be scalable too. Start off small and simple, get it right, and then grow it in the future.

In order to save time, make sure that once you've set up a collection method, it can be saved and used again next time – no-one wants to reinvent the wheel.

Do make sure that the data you're collecting is GDPR compliant and that you obtain and record the necessary consents for using people's stories, photos and information. **The Information Commissioners Office** can help you with this.

FEEDBACK & REPORTING

So, you've defined your desired outcomes and outputs and have set up collection methods for the information needed to measure your success towards these. What are you going to do with the information now?

Ordinarily you'd produce an internal draft of the impact measurements. At this stage you can check that your methods and measures are providing the information you need. If not, you can make the necessary changes.

Once you are happy you're collecting the right data, you need to decide what to do with it. You need to go back and look at what it is you and your stakeholders want or need from that information and how best to present it: detailed and written reports, statistical information or do they just want to see a simple overview?

You are likely to have two different types of audience for the information, internal and external. The internal needs to be very detailed and needs to be thorough and consistent. For an external audience, you need to offer headline information and in a format that is easily digested and understood.

The information given must demonstrate:

Your Why – why you exist and what your overarching aim seeks to effect / achieve (Impact)

Your Aims - What are the short and longer term aims that will help you achieve these (Outcomes & Outputs)

Your Activities - What are the services, projects, programmes and campaigns you will undertake to achieve these aims (activities).

Your Success? - How are you doing against your intended aims, Your Proof – how can you prove what you're achieving.

Your improvements – What have you learned? How can you use this learning to improve?

PRESENTATION

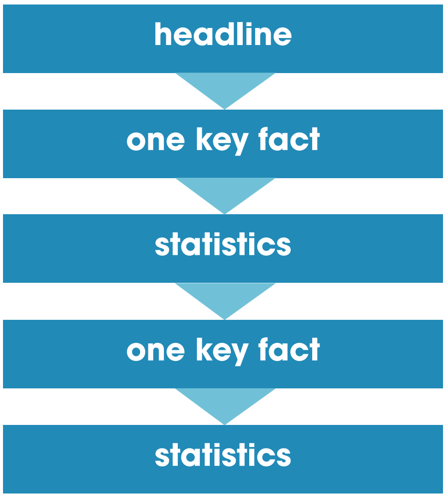
It has recently become popular for charities to produce formal impact reports in the same way that they produce annual reports and accounts, for sharing with external audiences.

There have been some brilliant examples of how measuring and reporting impact can be the greatest influencer for your charity. And the variety of reporting styles and formats is growing. From a simple one-page report showing headlines, movement and graphics to demonstrate change, case study videos, quotes and statistics, to an interactive tool to show in real time how you

and your support could influence impact. Impact measurement has become the new “must-have” in charity storytelling and it’s stories, connection and impact which help engage the wider worldwith your charity and the work you do.

As a guideline, there are 8 key areas worth considering to help you gain maximum impact in the sharing of your information. The communication needs to be:

- clear, simple, un-jargonistic and presented in a logical and coherent manner
- offered in a level of detail that is representative of the size and influence of the charity itself
- relevant and appropriate to the intended audience
- offered in a format which is accessible to the intended audience(s) especially if any area of that audience has any sensory or cognitive needs
- accountable and fit for the decision-making purposes it is to be used for
- scalable for engagement at different levels of interest



- balanced and transparent, addressing the extra pressure on charities to prove their principles of openness and honesty, not just claim them
- proven and backed up information with evidence and verification

Recent evidence suggests that the use of images and graphics significantly improves the retention of **information**.
Hear a piece of information, and three days later you’ll remember 10% of it.
Add a picture and you’ll remember 65%.

Use different stories to help bring your measurement to life – photos, audio and video of actual beneficiaries help to connect the audience with the cause. The smallest of charities can easily collect these; all you need is a smart phone, a willing beneficiary, and their explicit consent. The **SOI Dog Foundation** (may contain distressing content) improves the lives of Dogs and Cats in Asia. Here is footage of a dog walking for the first time after being fitted with prosthetic front legs. There is no editing, no soundtrack, and no call to action. Yet it has been viewed over 9million times and shared over 200k times. The dog can’t speak and can’t tell you how life-changing the charity has been to him. He doesn’t need to. You can see it in his face. Despite the fact that Comic Relief does not support animal charities, this footage is a good example of how to demonstrate impact.

There are many simple communication tools with which you can add images and graphics to your reports which are usable by even the smallest charities with little or no budget:
Infographics – show statistical information in an easily digestable way.

There are a number of online tools you can use to create infographics of your own including Canva **(www.canva.com)** which has a free version as standard (not profits can also apply and access the preiumum version for free) and **www.piktochart.com**

If it's just simple graphs and charts you're looking for, excel has a function enabling you to covert figures in a spreadsheet.

PowerPoint/Keynote can also be used to animate and add interest to your reporting. Dementia UK published this animated impact **report**. A simple version of something similar could be created for free within PowerPoint.
Just making the layout of your information interesting and eye-catching can add impact to the information you're offering – use your brand colours, boxes, lists and tables to break up large chunks of text.
You can easily turn photos into video by using free online tools. **www.ripl.com** has a free version that will allow you to convert up to 8 images into a video with a music accompaniment in the background. For around £12 a month you can upgrade and include more than 8 images, your own choice of music and other features.

For around £30 pcm you can create cartoon-like whiteboard videos with **www.doodly.com**, an easy-to-use tool which allows you to create scenarios of your choosing without the need to use beneficiaries themselves.

Use the words **THANK YOU** at least once, to acknowledge the support which enables you to do what you do – even those who haven't supported you will appreciate your acknowledgment of collective responsibility.

Don't forget, not all audiences are interested in the same area of your charity's operation - show your impact across your whole sphere of influence.

Some of the most effective impact reporting actually shows

> *Use the words THANK YOU at least once, to acknowledge the support which enables you to do what you do*

a beneficiary telling his or her story of how your charity has impacted their life. These can be recorded and edited on a smart phone and really give the audience insight into the difference you are making to real people's lives and will help you connect with your audience on an emotional level.

Remember, however you choose to represent this information, make sure you ask for explicit and informed consent, being very clear about how, where and why you want to use and share the information. You can then add it to your website in a format that is downloadable, and share the links on email and on social media. As well as making the information easily available to a larger audience, you will also reduce print costs by not producing hard copies of the information.

North Devon Hospice have created a multi-purpose **document** which uses the story of a hypothetical patient to explain what the hospice does, how their services work and then drops an impact statement on the bottom of every page, providing proof for every element of care. While creating the cartoon-like images might have some cost implications, the overall premise is entirely translatable.

CRUK have a long history of making big impact across so many different types of cancers, it's a challenge to summarise it all. But their latest report "[Beating Cancer – our progress]" has a "self explanatory title" and works well. They very concisely share what they've done with their supporters' money. This open approach helps demonstrate that they value their integrity which is very important to supporters.

National running phenomena **Park Run** have created a great annual report and included their impact reporting within it. It is a simple combination of text, infographics, photos and stories, which could be generated in a word document, and enhanced using some of the previously mentioned free tools, and then saved as a downloadable PDF. But the overall message is really effective.

In late 2018, **CLIC Sargent** hit the charity headlines with the production of their latest annual report, where they took honesty and transparency to the max and admitted a number of areas in which they'd not achieved what they wanted to. A very bold move and one which has been received really well. We are all human and none of us are perfect. We know that charities aren't perfect too. In CLIC's open and honest reporting of their areas of underperformance, they have given themselves a great platform from which to reassess those individual aims and objectives and use the measured information to help address challenges for the year ahead. They are another charity demonstrating their commitment to open and honest reporting and communication.

For the ultimate in digital impact reporting, you can't get much better than Street League, the UK's leading sport for employment charity. They have taken impact reporting to the nth degree by creating a real-time Impact Dashboard on their website – take a look **here.**

But your own measurement and reporting doesn't need to look anything like these. You just need to be able to demonstrate and prove how well you're doing at changing your bit of the world. The more clearly and effectively you can do this, the more clearly and effectively you will be able to make decisions, create change, and attract supporters. Start small, get it right, learn from it, effect change.

Here are some simple Do's and Don'ts to help guide your Impact Reporting

Do's & Don'ts

DO keep asking Why? Why do you exist? Why do you want to measure your impact? Why do people need to know? Why do you need to know?

DO make the system work for you – be realistic, and measure the elements you know will bring benefit to your organisation

DON'T try to emulate or compare yourself to anyone else: your impact reporting is your opportunity to focus entirely on you

DON'T make the process so forensic that it becomes more time-consuming than actually delivering your service

DO be honest and use your impact reporting as part of your emotive story. It is a window into your organisation. Use the opportunity to highlight lessons learned

DO plan the development of your impact measurement over a number of years – start small and introduce the concept with simple but effective measures. Introduce more detail over time

DO use your reporting to showcase and communicate your progress towards your long-term goal

DON'T overcomplicate things: keep the reporting simple and show a journey that hasn't yet finished

DO monitor your monitoring: impact measurement is not just about proving, it's a valuable tool in improving. If your measures don't help you to make decisions, they're the wrong measures

DON'T tackle this on your own. Look at examples of charity impact reporting that have impressed or inspired you and approach the authors direct to find out more – they will be happy to share good practise and flattered you asked!