

ACTIONABLE IMPACT MANAGEMENT

AIM VOLUME THREE | DATA | ACTIVITY GUIDE



A FRAMEWORK FOR...
SOCIAL IMPACT STRATEGY,
ASSESSMENT, & COMMUNICATION

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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

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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.

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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 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. 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

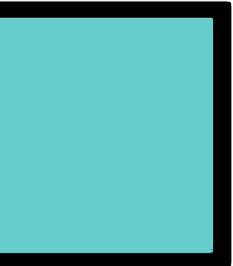
VOL. 3 DATA

DATA CAPACITY
DATA TOOLS
DATA STRATEGY

VOL. 4 COMMUNICATION

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

VOL 3 | DATA IN THIS VOLUME



DATA CAPACITY

OVERVIEW
ACTIVITY



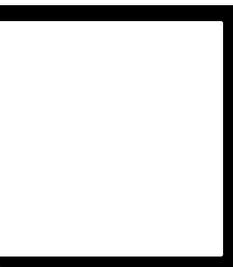
DATA TOOLS

OVERVIEW
ACTIVITY



DATA STRATEGY

OVERVIEW
ACTIVITY



WORKSHEETS & GLOSSARY

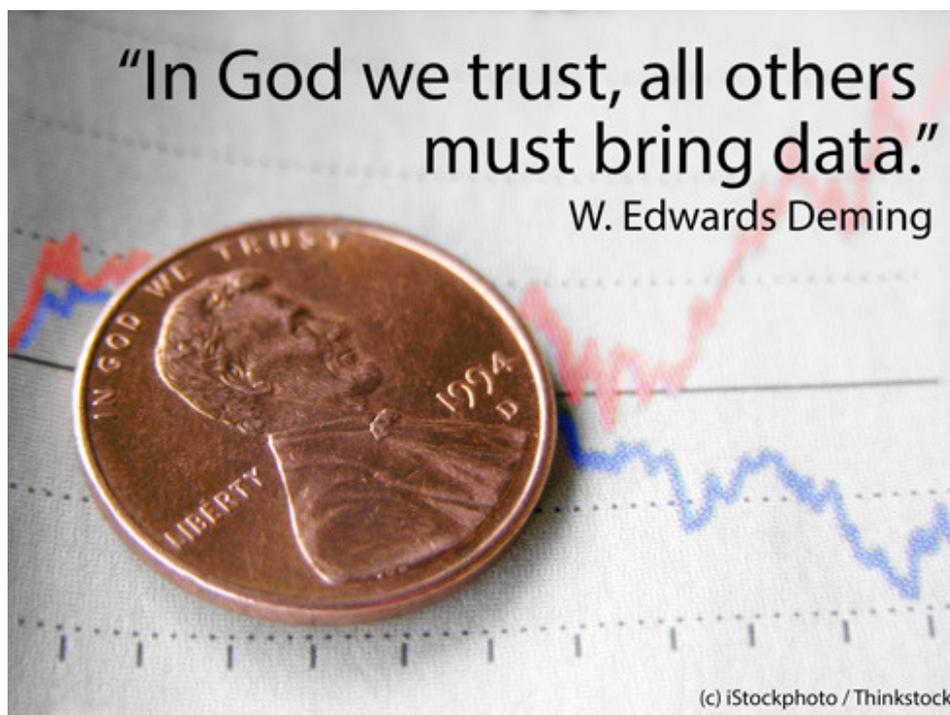
DATA

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.

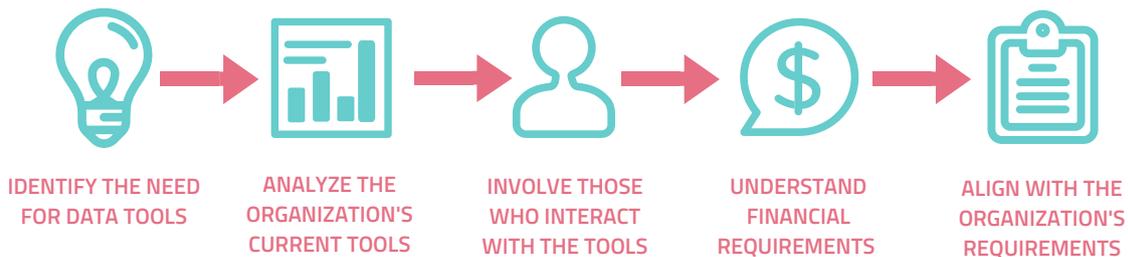
Volume Two: Metrics covers the metrics selection process for your impact program assessment and impact measurement.

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.



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:



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

COMMUNICATION

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
	DATA ANALYSIS: TRACK CLIENTS	DON'T NEED IT	NEED IT	IMPORTANT
ANALYZE: HOW ARE THE COMPILED DATA ANALYZED?	DATA ANALYSIS: SUMMARY EVALUATION	DON'T NEED IT	NEED IT	IMPORTANT
	COMMUNICATE IMPACT: EXTERNAL REPORTING	DON'T NEED IT	NEED IT	IMPORTANT
COMMUNICATE: HOW IS THE ANALYSIS VISUALIZED?	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

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: HOW ARE THE DATA COLLECTED?	DATA COLLECTION: PRIMARY DATA	PAPER FORMHUB GOFORMZ SURVEY MONKEY	IMPACT CLOUD MAGPI FORMHUB	IMPACT CLOUD MAGPI FULCRUM
	DATA COLLECTION: AGGREGATE DATA	AIRTABLE EXCEL GOOGLE FORMS	IMPACT CLOUD AIRTABLE FORM ASSEMBLY	IMPACT CLOUD FORM ASSEMBLY
COMPILE: 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 EXCEL	IMPACT CLOUD AIRTABLE SALESFORCE	IMPACT CLOUD SALESFORCE
ANALYZE: HOW ARE THE COMPILED DATA ANALYZED?	DATA ANALYSIS: TRACK CLIENTS	AIRTABLE EXCEL	IMPACT CLOUD HUD'S HMIS	IMPACT CLOUD HUD'S HMIS
	DATA ANALYSIS: SUMMARY EVALUATION	AIRTABLE EXCEL	IMPACT CLOUD TABLEAU	IMPACT CLOUD TABLEAU
COMMUNICATE: HOW IS THE ANALYSIS VISUALIZED?	COMMUNICATE IMPACT: EXTERNAL REPORTING	CANVA: PRODUCTION	IMPACT CLOUD FLUX BLACKBAUD	IMPACT CLOUD FLUX BLACKBAUD CUSTOM INTEGRATION
	COMMUNICATE IMPACT: INTERNAL NETWORK	CANVA: PRODUCTION EXCEL SILK.IO PLOT.LY	IMPACT CLOUD TABLEAU SALESFORCE DASHBOARDS	IMPACT CLOUD TABLEAU SALESFORCE DASHBOARDS
	COMMUNICATE IMPACT: PUBLIC	AIRTABLE CANVA INFOGRAM EXCEL	IMPACT CLOUD TABLEAU INSTANT MAGAZINE	IMPACT CLOUD TABLEAU 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"

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 as 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.

