

Choose the change and the reader

Lessons 1-5: pathway, logic model, impact dimensions, evidence model and audience.

Start with one program and one reporting decision. Reuse a sound existing model; you do not need a new diagram for every lesson.

Print and write on these pages, or copy the questions into your preferred document. Keep your answers beside the course as you work.

Decision and audience

What will the reader decide, and by when? Separate confirmed requirements from assumptions.

Outcome and pathway

What changes for whom? Connect activities, outputs and outcomes. Name one assumption and one evidence gap.

Ownership

Who maintains the definitions and confirms what the report requires?

Define a measure someone else can use

Lessons 6-7: measures and counting rules.

Fictional practice: a service team invites 200 eligible accounts; 120 respond once and 84 report resolution. Response coverage is 60%; resolution among respondents is 70%. The other 80 accounts are unknown.

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Your metric definition

Name, unit of record, eligible group, period, numerator and denominator.

Exceptions and interpretation

How will you handle duplicates, missing responses and corrections? What can this measure NOT establish?

Independent check

Ask a colleague to calculate the example using your definition. Record differences and the agreed rule.

Connect requirements to collection

Lessons 8-9: evidence map and collection at the source.

Keep a small shared core where comparison is needed. Sites may use different questions beyond that core. Collect suitable registration information once; refresh information when it changes.

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Evidence map

For one report requirement: source, available evidence, missing evidence and owner.

Collection plan

Who contributes what, when, through which instrument, and against which record?

Governance and local flexibility

Define shared fields, allowed local variation, access, consent where relevant, and the change history.

Check a finding before sharing it

Lessons 10-11: repeatable numbers and traceable sources.

A repeatable number can still be wrong. Save the calculation, input version and definition; review qualitative interpretations separately.

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Known-answer test

Write the expected result, source records and rule. Include a missing or duplicate record.

Source trail

Connect one claim to the source version, calculation, qualitative evidence if used, and reviewer.

Release decision

What passed? What remains uncertain? Who may see the underlying evidence and who approves the claim?

Draft a report that helps someone act

Lessons 12-13: report brief and reviewed drafting.

Use the same evidence pack whether you draft by hand or with AI. Do not turn an association into a causal claim or treat missing responses as negative outcomes.

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Report brief

Audience, decision, two findings, relevant limits, and requested next action.

Claim-by-claim review

For each main claim, record source, calculation if applicable, review correction and approval owner.

Close the cycle

What will change next? Name an owner, a follow-up date and the evidence needed to check progress.

Optional: decide whether valuation helps

Optional lessons 14-17. A useful impact report does not require SROI.

Continue only when a monetary estimate serves a real decision and the evidence supports it. Do not invent missing values or adjustments.

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Purpose and evidence

Why monetize this outcome? What evidence and stakeholder input support doing so?

Assumption register

Record outcome, quantity, duration, proxy source and fit, adjustments, costs, and possible double counting.

Review and uncertainty

Which alternative assumptions change the result? Who reviews the calculation? Explain what the estimate cannot establish.
