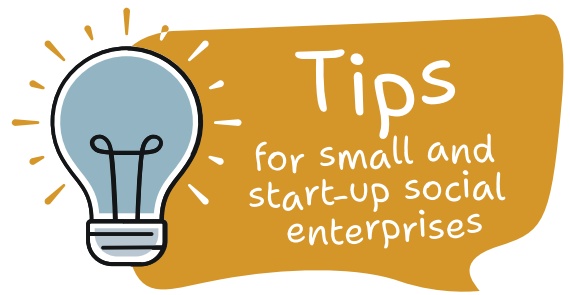


# Planning

Planning is an important step for your social enterprise when it comes to using data to support your mission. Here are some tips from small and start-up social enterprises for successful planning.



## You don't have to do it all at once: remember that you will build your data system over time

It's easy to feel frustrated or overwhelmed when it comes to data. It's also common to feel like you 'should' have better data systems in place, or to compare your 'data mess' with another social enterprise's beautiful impact report.

Instead focusing on what you don't have, try to focus instead on opportunities for steady, continuous improvement. Remember that you're not completing a one-off project with a clear beginning and end: you're building the systems, processes and culture that will help your social enterprise turn data into insight and learning.

Change will take time. So start by celebrating where you are now! And then choose some manageable things to work on over the next 12 months. Over time, small improvements will add up to a data practice that supports your mission.

## Plan for the whole data cycle to keep things realistic

Creating an impact measurement framework can be a useful process to help you to unpack, clarify and communicate the change your social enterprise is trying to make, and how you'll make it.

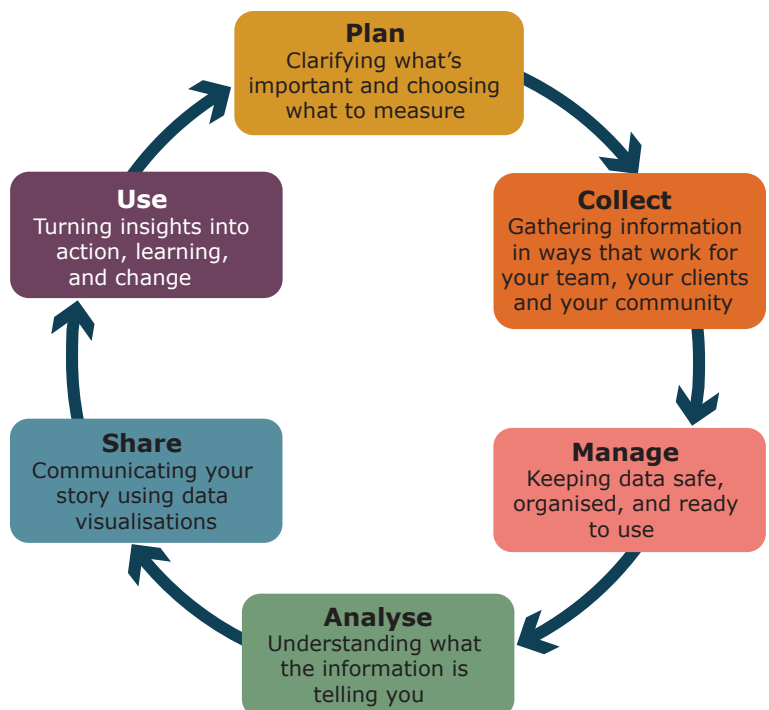
But planning is just one part of the data cycle. If you don't have the time and resources to analyse, share and use your data, you won't get much value from it. Be careful not to end up with a plan that you can't implement. To keep things realistic, you might need to start by focusing on a small set of indicators, a single impact area, or just one of your social enterprise programs. Then you can build on this work over time.

### What is the data cycle?

The data cycle is a way of understanding the journey that data takes through your social enterprise.

You get the best value from your investment in data when you make it through the full cycle, so you have data to share with others and use for decision making. Thinking about the data cycle helps you keep the whole picture in mind when you plan your data projects, instead of focusing too much on one step.

The data cycle is also a reminder that you often use your data in repeating cycles, not just one-off events (think about annual reports or quarterly board meetings). So you have opportunities to improve and build your data practice each cycle.





## What do you include in an impact measurement framework?

- Define the problem (problem statement)
- Map the pathway from activities to impact (theory of change)
- Define the outcomes that you will measure
- Define how you will measure outcomes (indicators)
- Create a practical measurement plan (data sources, responsibilities etc)

### Start by thinking about how the data will be used

A tip for working out what data to focus on is to think about who will use the data. What decisions do they need to make? What is important to them? What will they find interesting? For example, a program manager might want information about how to improve the next round of the program, while a funder might want good news stories about program success. Being clear about data use will help you make decisions about where to invest.

### Reflect on and communicate your 'why?' for data

If your answer to 'who will use the data?' is only 'reporting to funders or potential funders' you might want to spend some more time reflecting on how you can use data within your social enterprise. Funders are important, but if they're the only audience it can be hard to feel inspired by or data work, especially if you don't fully agree with their priorities. Even if you have limited resources, try to include some things that you and your team are enthusiastic about in your data practice. Communicating why the data is important can also help with improving your response rates or encouraging frontline workers to enter data accurately and consistently. People are often more motivated when they understand how data supports the social enterprise's mission, not just its reporting requirements.

### Don't start from scratch with your data planning

You already know what your social enterprise does, how you do it and the change that you want to make. And you probably have this documented on your website, business plans or other strategic planning documents. Use this existing language in your impact measurement framework or update those documents so your data planning work aligns with your other strategic planning work. This will help you to tell a clear, consistent story.

Another tip is to look at how other social enterprises and non-profit organisations with similar goals are reporting on their impact. Their approaches might give you some great ideas and inspiration for frameworks and measurement tools.

### Make sure you're speaking the same language

There's a lot of jargon in impact measurement, and people may use different terms in different ways. This can cause confusion, especially if you're working with people outside your social enterprise, such as funders, consultants, or partner organisations. Ask people to share specific examples of what they mean when they say things like 'program logic' or 'indicator' to check you're on the same page. Clarity will make collaboration easier.