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MEASURING IMPACT

A Guide for Grantmakers and CSR Professionals

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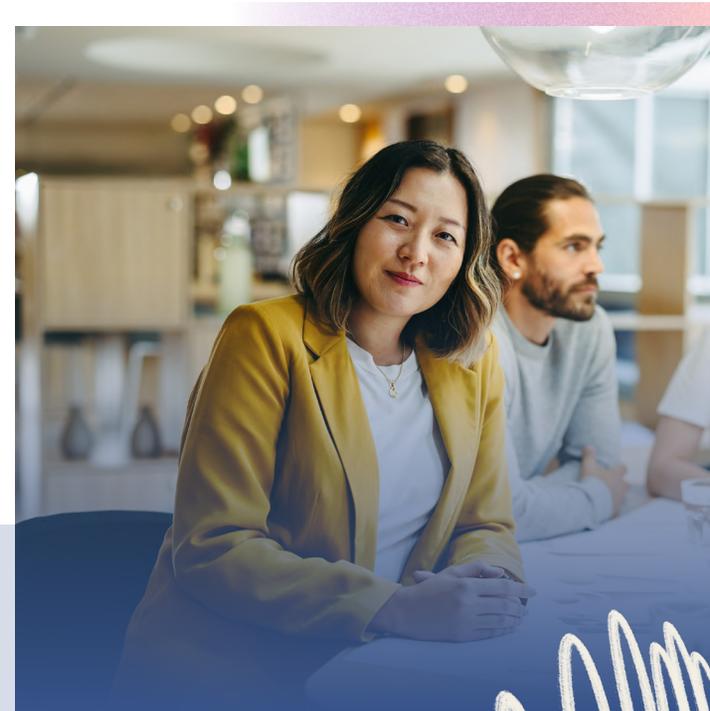


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Introduction

If you've ever wondered how much impact measurement really matters, look to Florence Nightingale. In the 1850s, she collected data that proved unsanitary hospital conditions were killing patients. And in turn, she transformed the field of nursing.

Of course, before Nightingale arrived at the hospital, the staff there was doing the work they thought they needed to do to save lives. But without measuring their impact, they had no idea whether their approach was effective or in fact causing harm.

It's a high-stakes example, but today's philanthropy is exactly that. Whether you're working to address climate change, poverty, racism, hunger, inequality, or another big issue, lives are often on the line.

No matter what role you play in the sphere of social impact, you want to know that the work you do is having a positive effect on the causes you care about. Let's dive into the benefits of impact measurement, how to measure it, and some common mistakes to avoid.





But first, what is social impact measurement?

Social impact measurement involves taking stock of the **direct and indirect outcomes** created by a social impact program. Measuring your impact allows you to take a step back and understand how your program fits into broader efforts to make change. You can break down how your program is performing compared to expectations and look for opportunities to do things better.

Running a social impact program without any mechanism for measurement is like trying to build a bridge with your eyes closed. If you can't ever see the full structure, you'll never know whether the work you're doing is creating something lasting that can actually bear weight.

The expected (and unexpected) benefits of measuring social impact

Measurement can be the difference between building a successful program and one that fails to deliver. It ensures that you're aligning the work you do with your core mission. Beyond that, measurement allows you to be **dynamic and intentional** about the work you do.

Identify what works vs. what *looks* like it works

You chose your program mission for a reason. The last thing you want is for your investment to be wasted. Measuring impact will give you the tools to assess how your resources are being utilized. Are there components of your program that are more successful than others? Are some of your efforts failing to create the change you intended?

Knowing the answers to these questions will help you decide whether to shift your approach. Perhaps you want to narrow your focus to the areas of your program that are working well. Or maybe you want to dig in to understand more deeply why the change you envisioned doesn't match the reality on the ground.

For example, in the early 2000s microcredit was lauded as

an incredible tool to fight poverty and empower women.

Many corporations and foundations hurried to incorporate this new trend into their CSR and cause marketing strategies. However, at the time, not much research existed on the actual impact of this approach and so nonprofits relied on heavily anecdotal evidence to prove efficacy.

To establish clear data, [six randomized evaluations were conducted](#) between 2003 and 2012. The results proved that although microloans increased some metrics such as business activity, they did not have a significant impact on income, investment in children's education, or an increase in women's empowerment.

Facing such truths helps funders direct resources to programs that really work—not programs that look like they work.

Develop stronger connections with those you fund

One of the best mechanisms for understanding your impact is **feedback from the community** you're serving. Reaching out to them gives you a clearer picture of your impact and opens up direct lines of communication.

Building strong relationships within your community benefits everyone. It allows you to tap into an incredible resource of knowledge and ideas while **giving folks a voice** in how your program operates. Forging meaningful connections will help you build and maintain trust, foster a sense of collaboration, and ensure you'll be the first to know if problems arise.



When we spoke with [John Brothers, President of the T. Rowe Price Foundation](#), in the fall of 2023 he had a poignant example of when this relationship is not in place. During a period of unrest in Baltimore, a group of businesses got together to create a plan to help improve the community. They decided, in the face of injustice and unrest, to build a playground in an underserved neighborhood.

Today it sits empty. Because it's not what the community needed. There were better ways to use that funding, and proper impact measurement of previous programs and providing space for the community to react could have revealed them. Brothers now drives T. Rowe Price employees by that playground years later to show what it's like when you don't listen to the community and adapt your program accordingly.



How measuring social impact helps trust-based philanthropy

One of the core tenets behind trust-based philanthropy is trusting grantees to use funds in a manner that helps their community the most.

But, trust is a two-way street. Your grantees need to trust you as well. When you measure social impact, you put proof and data behind your actions. This goes a long way toward establishing trust with your community.

Adapt to change

As the world evolves so do the needs of your community. These changes may be sudden or gradual. An event or disaster will **reshape priorities**. And over time, technical advancements will alter how folks interact with and receive aid ([AI, anyone?](#)).

Change is inevitable. Taking the time to assess your impact means you'll be aware of when your program needs to evolve and what the evolution should look like.

The [COVID-19 vaccine rollout](#) in the United States set a perfect backdrop for finding ways to use data to adapt practices. In June 2021, experts noted a big disparity in vaccine access. Across 41 states, 44 percent of white people had at least one dose, compared to only 31 percent of Black people and 35 percent of Hispanic people. Having these metrics encouraged local governments and organizations such as [CORE](#) and [Partners in Health](#) to mobilize in underserved communities. This included mobile vaccination units, walk-up sites, door-to-door campaigns, partnerships with local leaders, mass vaccination events, employing local translators, and more.



Adjust what's not working

When you create and launch your social impact program, you do your best to account for all **possible pain points** for your applicants and recipients. But, it's impossible to catch everything before it happens. By regularly checking in, you can adjust what isn't working well.

Catching small issues early prevents little things from ballooning into larger problems. Maybe instructions on an application are unclear or confusing. Or there's a kink in the lines of communication between a CSR leader and employee volunteering participants. You want to find, identify, and fix these types of issues as quickly as possible.

If there's a larger question about your program's efficacy, you should know right away. Maybe the problem you sought to solve is more complex than you realized. Or the solution you implemented has created a new unexpected issue. Either way, measuring impact allows you to collaborate with your team to address any spots where your program is falling short.

Being aware of your impact also allows you to go beyond program-specific tweaks, and make internal adjustments as well.

The team at [City Year](#), a nonprofit dedicated to providing resources for students to thrive, realized in 2014 that their data collection methods were not as dynamic or as targeted as they needed to be. Specifically, broad program evaluations didn't actually support the 3,000 Americorps members working in the field. These members needed frequent access to data that would help them monitor an individual student's progress and inform decisions about interventions. As the team at City Year retooled their approach to measurement, they made it a priority to support real-time monitoring for folks in the field. The shift has paid off, with an increase in the number of students receiving support and improved student performance.

Expand programming

If your program is creating meaningful change, you might consider what it would look like to expand it over time. You can consider whether **scaling the program** to extend its reach makes sense. Or, instead, you could use the **program model as a blueprint** to launch similar campaigns with different focuses.

Effective impact measurement gives you evidence of success so you can plot out a program expansion with confidence. You'll be able to point to what works well and make a plan to incorporate those strategies as you move forward.

Patagonia, maker of outdoor clothing and gear, has long been an advocate for the planet. Yvon Chouinard, founder of Patagonia, made this clear with the founding of [1% for the Planet](#). Chouinard and Craig Mathews, founder of Blue Ribbon Flies, started 1% for the Planet in 2002, with the aim of donating 1% of all sales to various environmental groups. Over the years their efforts have resulted in thousands of donations to environmental organizations.

Then, [in 2023](#), Chouinard took things a step further—he announced Patagonia's voting stock would change hands.

- Patagonia Purpose Trust would own 2%
- The Holdfast Collective would hold the other 98%
- 100% of annual profits will now be reinvested into the business and environmental organizations

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Instead of 'going public,' you could say we're 'going purpose.' Instead of extracting value from nature and transforming it into wealth for investors, we'll use the wealth Patagonia creates to protect the source of all wealth.



YVON CHOUINARD
Founder of Patagonia

Tell a meaningful story

Stories matter. Whether you're trying to connect to customers or board members, having a story to tell helps. This is especially true as trust-based philanthropy and [unrestricted funding](#) continue to grow. These approaches to philanthropy are based entirely on trust, impact, and storytelling—not just data-driven metrics.

Measuring your impact gives you the chance to understand the effect of your program and distill it into a moving narrative.

Take a look at these three impact reports to see how metrics and stories can be woven together to paint the full picture of a program's impact.

- [DREAM 2022 Year in Review](#)
- [Girls Who Code 2022 Annual Report](#)
- [Charity: Water 2022 Annual Report](#)

As you collect data and feedback from your program, you'll be able to weave it together to create a unique story about the impact you've achieved. This provides a compelling

format to communicate to donors, customers, employees, and the public at large about how your approach is making change.



4 guiding principles for measuring impact

Measuring impact should never be an afterthought—it's integral to the success of your program. Ad hoc attempts to gather data won't give you the clear picture you need to know whether you're making lasting change. Be intentional about your approach. As you make plans to incorporate impact measurement into your program plans, keep these strategies in mind.

1. Start with the end in mind

Effective measurement is rooted in your core mission and shaped by the strategies you deploy. As you build your program, there are numerous steps you can take to ensure you always keep your goal front and center:

- **Include plans for measuring impact right from the start.** This encourages your team to think about the full scope of your program and how to measure each piece.
- **Make a plan for collecting data.** As part of this plan, figure out who will be responsible for organizing and analyzing any data as well.
- If you already have a program in place and want to be more strategic, **step back and think about your original goals.**

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Impact measurement can be made significantly cheaper if you plan from the outset. You must know what change you wish to achieve and understand the outcomes and outputs necessary to achieve your goals. Only then can you set up mechanisms to collect data at the appropriate time.



TIGER DE SOUZA
People Engagement Director of
National Trust

If you already have a program in place but you want to be more intentional and strategic about your impact measurement, consider your goals when you started. Be sure to center your approach on your mission. With your program up and running it's easy to get fixated on measuring the things you're doing now. But if you don't step back and look at what you wanted to achieve with your program, you won't have a sense if you're actually moving the needle.

For example, let's say you created a program with the intention to help survivors of domestic abuse. You launched a drive for donations of household goods to help folks get back on their feet, and then you realized that you needed to measure your impact. You look around and say, "Look how much stuff we collected, let's measure that." Though it may be an easy thing to measure, the quantity of your donations doesn't tell you whether you've actually made a difference in the lives of survivors.

2. Look at the bigger picture

Good impact measurement is about going beyond what you give to understand the **wider context** of your work. Rather than just counting up the amount of money you donated or the number of volunteer hours clocked, you want to measure how those things made a real impact.

For instance, if you gave money to a nonprofit that supports adult literacy programs, don't just count what you put in—find a way to take stock of that program's impact.

- What did your help enable them to do?
- Did total participation increase?
- Did additional funding allow for the hiring of additional teachers?

Knowing how your resources created meaningful change allows you to tell a more complex story. However, be mindful of outcomes you can't see up close or immediately. Long-term effects take time to see, let alone measure.

For instance, an adult literacy program might have an incredibly positive effect on people's employment and educational opportunities. But, that's not something you can measure immediately. Find ways to measure those shorter-term outcomes like participation, but make space for the possibility that some aspects of your impact will take much longer to understand.

Don't be too quick to pull the plug on a program just because you don't see the changes you hoped for right away.



3. Center community values

At the heart of your social impact program is the desire to make change by providing something of value to your community. That being said, it's easy to get stuck in your own value system. You need to work to understand how your program goals **intersect with community needs** and values.

For instance, say you want to help a nearby school district improve graduation rates. You decide to launch a tutoring program to provide free assistance to students. This sounds great, but does a tutoring program align with what the community needs? Is the graduation rate low because students don't have access to tutors, or are there other factors at play? Perhaps kids are working and don't have sufficient time to dedicate to schoolwork. Or maybe they don't have reliable transportation to and from school.

The key is asking the community what they need and listening. Build your program around the community values, even if that means reimagining what you first envisioned.

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Take inventory of the communities where you do business and align goals with things that are larger than yourself. If you're a local company, connect with local governance and small community-based organizations to really figure out those critical issues they're trying to solve.



JEROME TENNILLE

Manager of Social Impact & Volunteerism at Marriott

When you measure a program that isn't aligned with a community's values, you'll get data that doesn't mean a whole lot. No matter how many donations you make or volunteer hours you log, if the work isn't rooted in the community, you're likely not creating a lasting impact.

4. Examine the full power of your impact

Beyond knowing whether you're creating meaningful change, there are other [essential questions](#) that will give you a fuller picture of the value of your program.

You want to know if your program is striking the right chord for your team, the community, and the public at large. Part of your measurement should address the effect of your program on your organization from both an **internal and external** standpoint.

- Is your program building trust?
- Is it focused on causes that feel urgent to others?
- Is it aligned with the values of your employees, stakeholders, customers, or donors?

You want to know how the public feels about your social impact program. Do they know it exists? Are they enthusiastic about the work you're doing? Take a poll or launch targeted campaigns to measure this.

For example, in 2016 Patagonia announced that 100% of their sales on Black Friday would go to grassroots environmental organizations. The team projected sales of \$2 million. In reality, sales topped [\\$10 million](#). This showed just how enthusiastic their customers were about the company's work to support environmental stewardship.



Avoid these common mistakes



Measuring the wrong thing

If you're fixated on the wrong metrics, you'll be building the wrong solutions.



Making assumptions about correlations between a program and an outcome

The problems you're looking to address are complex—be sure to take into account other factors contributing to the outcomes you influence.



Not setting clear data goals for impact measurement

Be clear about what you want to do with your data—whether you'll be using it to inform decisions, provide info to funders, or prove model efficacy.



Undervaluing general operating support

Trust organizations to use donations effectively—whether it's for staffing, overhead, or other operating expenses that support longevity.



Gathering data you don't have the capacity to analyze

Only collect the data you need and have time and resources to analyze.



Ignoring indirect side effects

Your work is not done in a vacuum. Take into account the indirect side effects of your work to get a more complete understanding of your impact.

A step-by-step guide to measuring impact

If it's not clear by now, measuring impact is a nuanced process that isn't always clear-cut. Your organization and mission, as well as your community, are all unique and bring unique challenges. Despite the many variables in measuring impact, there are still several steps you can take to guide your efforts.

1. Define success

Before you get started, you want to get a clear picture of how you and your team understand success. Ask yourselves:

- What impact are we trying to make?
- What outcomes do we envision?
- What do we seek to achieve?

Alnoor Ebrahim, author of [*Measuring Social Change: Performance and Accountability in a Complex World*](#), frames the necessity of asking these **foundational questions** this way:

“It’s an obvious question, right? But when we get caught up in the day-to-day work of social change, we sometimes forget

to ask it...And we need to ask it periodically to make sure that our work is still driven and connected to that end goal. It’s more specific than mission because it asks you to be specific about the needs you’re trying to address and who your most important clients are.”

Include the community in these conversations. If your vision of success doesn’t align with theirs, now is the time to bridge that gap. Ask them what changes they would like to see. Have they seen programs fail or succeed in the past? Do they have thoughts on what strategies would make the most difference? By making these connections early with a focus on collaboration, you’re building an important foundation for your program’s success and longevity.



2. Choose your framework

Choosing a framework gives you the structure for your measurement, allowing you to **set targets** and **assess your performance**.

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What a good framework does is help you actually answer questions like what, how, and why do we measure? Once it is in place, it empowers your team to build more executive support by showing your impact, and also building the case for them to keep investing to hit those targets



MARK HOROSZOWSKI
CEO at MovingWorlds

Depending on your organization, your available resources, and the scope and focus of your efforts, you may choose to use an existing framework or to create your own.

Creating your own framework

For focused programs, creating a proprietary framework may be the best way forward. There are several models that can be used as a template to develop your own framework to judge the performance of your social impact program. A few to consider are:

Theory of Change

A [theory of change](#) is a model frequently used by purpose-driven organizations across industries that identifies long-term goals around social progress and works backward to identify the necessary preconditions that will bring the desired change about.

Logic Model

Similar to a [theory of change](#), a logic model identifies the inputs, activities, and outputs that will lead to the desired short- and long-term outcomes and ultimate impact.

Example of a typical logic model for a local food bank

Inputs

- Funding
- Staff
- Volunteers

Activities

- School lunch program
- Weekend meal program
- Family grocery box program
- Education seminars

Outputs

- Meals provided
- People fed
- Families assisted
- Communities served
- Educated individuals

Short-term Outcomes

- Reduction of hunger
- Reduction of food insecurity
- Reduction of stress
- Increase in awareness

Long-term Outcomes

- Improved quality of life
- Improved health
- Sustained reduction of poverty

Five Dimensions of Impact

Developed by the Impact Management Project, this model identifies [five dimensions of impact](#) — what, who, how much, contribution, and risk — across which impacts can be benchmarked and measured.

Using an existing framework

There are many frameworks that have been developed by institutions and academics to tackle the sticky problem of measuring social change. For the most part, these frameworks are designed with corporations in mind, but they are largely applicable to nonprofits and other organizations as well.

Here are three possible frameworks to consider:

B Impact Assessment

Developed by B Lab, a nonprofit organization dedicated to using the power of business as a force for good, the [B Impact Assessment](#) helps companies measure their impact on workers, community, environment, and customers. This knowledge empowers them to assess their performance, compare themselves to peers, and identify areas for improvement.

The B Impact Assessment is a good choice for a for-profit

organization looking to measure the social impact of their organization holistically.

Sustainable Development Goals

The [Sustainable Development Goals \(SDGs\)](#) were designed by the United Nations to be a “blueprint to achieve a better and more sustainable future for all.”

The 17 SDGs span from ending poverty to achieving gender equality to responsible production and consumption, and provide a north star for many organizations to judge progress toward targets. While the SDGs were designed for states and countries within the UN, the principles and practices are applicable to virtually all organizations looking to effect change.

Principles for Responsible Investing

Developed by the United Nations, the [Principles for Responsible Investing \(PRIs\)](#) offer a model to incorporate Environmental, Social, and Governance (ESG) factors into investment decisions — an ideal framework for impact investment strategies.

Whether you use an existing framework or borrow a model to come up with your own, choosing a framework is an important precursor to measuring your social impact.



3. Identify your metrics

The best social impact metrics to track and measure for your program will be rooted in your definition of success and will be based on:

- The **framework** you select
- The **scope** of your program.

As a general rule, the more focused your program, the more straightforward the metrics and measurement process.

Keep things simple by centering your measurement strategy on metrics you can reasonably measure. Ebrahim, author of “Measuring Social Change,” says many organizations have a tendency to measure long-term outcomes. This tendency can lead organizations to focus on outcomes that don’t

necessarily make sense for their work.

Remember one of our guiding principles from earlier: Keep the big picture in mind. You won’t effect or measure major change in the short term.

To keep things simple, let’s use a basic logic model framework for short and long-term outputs and outcomes.

Outputs

Outputs are **indicators of change**. They are the direct, short-term measurements of your program’s activities.

Let’s use the example of an organization—it could be for-profit, nonprofit, or government — that runs a social impact program partnering with a local food bank.



In this table, you can see the activities, direct efforts, and direct outputs of the program.

Activities

- Makes a quarterly donation
- Contributes employee volunteers
- Hosts an annual education session for employees

Direct Efforts

- Number of hours volunteered
- Amount donated
- Percent of employees attending an education session

Direct Outputs

- Number of meals provided
- Number of people fed
- Percent of communities impacted within the state
- Number of people educated

Measuring outputs allows you to see the immediate impact of your work. It's a relatively straightforward process, but it doesn't quite tell the whole story of your impact. This is where outcomes come into play.

Outcomes

As your program objective evolves in scope, or you look to measure the long-term, broad impact of your program, the

outcomes of the logic model and metrics to consider become more complex.

This is partly due to the fact that outcomes are typically the result of efforts that extend beyond your organization's program. Therefore, while you may be able to participate in some direct measurement yourself, you'll likely also borrow data provided by outside sources.

Here, the food bank and the organization that partnered with the food bank could share a set of desired **short-term outcomes**. As you begin to measure **long-term outcomes**, it becomes increasingly likely that you'll need to rely upon data sets provided by entities such as governments, nonprofits, or consultants.

Short-Term Outcomes

- Reduction of hunger
- Reduction of food insecurity
- Reduction of stress
- Increase in awareness of food insecurity

Long-Term Outcomes

- Improved quality of life for members of the served community
- Improved health for members of the served community
- Sustained reduction of poverty in the community at large

With the above examples in mind, remember that all of those outcomes aren't necessarily the direct result of the organization. Reduced stress could be the result of more access to food, but it could also result from an uptick in employment or other elements. This is why it's especially important you have specific, measurable metrics to tie to your work.



Specific metrics which could indicate progress toward these broad, long-term objectives could include:

- Percent of children graduating from high school
- Teen pregnancy rates
- Divorce rates
- Median household income (poverty level)
- Unemployment rates
- Disease and undernourishment rates

Such metrics might be mined from sources which include, for the United States:

- [United States Bureau of Labor Statistics](#)
- [United States Department of Public Health and Human Services](#)
- [Centers for Disease Control and Prevention](#)
- [The National Center for Education Statistics](#)

A few international sources include:

- [The Economist Quality of Life Index](#)
- [The World Health Organization](#)
- [UN Data](#)



When it comes to identifying metrics for your social impact, the more focused your program is, the easier it is to measure your impact (and the easier to do so yourself). As goals grow in scope, judging your performance becomes a piece of a larger puzzle. Framing your goals around both short and long-term metrics will help you craft a program strategy that addresses the full scope of the causes you care about.



4. Consider your timeline

In the same way, you want to be deliberate about how and when you launch your program, you want to approach measurement with the same intentionality. Your timeline should balance the **urgency of your mission** with the **patience required** to make lasting gains.

The full effect of your program won't be measurable right away. But that doesn't mean you should wait. Set up a plan now, keeping in mind that each metric tells a unique piece of the story. Certain outcomes will require more time and even some flexibility. Consider, as thought leader [Neil Buddy Shah](#) warned at a panel on impact measurement, that good ideas risk "failing" if held to too rigorous a benchmark at too early a date. The key is identifying the right timeline.

Longer-term outcomes won't be measurable right away, but you'll want to collect other data as immediately as possible. For example, if you plan to solicit feedback from program participants, you don't want to wait too long. You want to hear their perspectives while they're fresh since the details of their experiences might fade with time. Then, you'll collect longer-term outcomes down the road as the program makes an impact.

The image shows a digital survey form titled "Six Month Survey". On the left side, there is a dark vertical sidebar with several white icons: a person, a location pin, a telephone, an envelope, a calendar, a list, and a link. The main form area is white and contains the following elements:

- Six Month Survey** (Title)
- Organization Name** (Text input field)
- How are things going? What is working and what isn't?** (Text input field)
- Please upload any community testimonials (photos, videos, or audio clips)** (Text label above a dashed border box containing a "Choose File" button)
- Select up to 10 files to attach. Acceptable file types: .gif, .jpg, .jpeg, .png, .svg, .tif, .tiff, .flac, .wav, .m4a (Footnote text)
- How can we better support you?** (Text input field)
- Save Draft** (Light blue button)
- Submit Form** (Dark blue button)

You also want to set a schedule to consistently measure your program results. Just because something is working well at first doesn't mean it will continue to do so indefinitely.

Whether you're tracking program activities, employee involvement, community sentiment, outputs, or longer-term gains, you want to have a **dedicated timeline** for measurement. Consider what kind of cadence makes sense for each metric, whether monthly, quarterly, or annually. Value consistency, but **be mindful not to overburden your staff or community members** with constant check-ins.

5. Understand the larger context

Your program exists in a complex world that's constantly evolving. Taking time to understand the other forces at play will help you get a clearer picture of how your program's work fits into the broader context.

Considering **your attribution**—or the degree to which your specific actions have brought about results—to a particular purpose or benefit is a part of honestly measuring the impact of your program. UNICEF's brief on [Strategies for Causal Attribution](#) digs into why understanding attribution is so central:

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Causal attribution is an essential element of any impact evaluation. It enables an evaluation to report not only that a change occurred, but also that it was due, at least in part, to the programme or policy being evaluated.



PATRICIA ROGERS
UNICEF

As a general rule, the longer the term of impact that you measure, the more limited any one activity or program's attribution.

For instance, let's take the outcome objective of a reduction of food insecurity as explored in the food bank example. Perhaps in 2020, the food bank met all its benchmarks on its output metrics. Yet, after meeting each of its direct goals, the food bank saw reduced performance compared to 2019 amidst all of its short and long-term outcome objectives. What gives?

As we all know, in 2020 the COVID-19 pandemic wreaked havoc quite universally on the health and wellbeing of communities across the world. Taking attribution into account in this example isn't at all to suggest that the food bank failed. In fact, it's highly likely that without the food bank's efforts, hunger, food insecurity, and related health outcomes might have deteriorated far more than they did with the food bank providing a safety net. So, while the numbers were lower in 2020 than in 2019, the outcome or impact wasn't necessarily lessened.



Attribution cuts both ways

It's important to understand that attribution cuts both ways. Just as outside factors can negatively impact your efforts, they can equally drive positive outcomes and inflate your efforts.

Don't claim too much credit for outcomes when outside factors play a positive role. This isn't just dishonest, it can also lead to a false indicator of a program's effectiveness and cause you to overlook opportunities for improvement.

Properly assessing the larger landscape can help you accurately attribute your efforts to the right outcomes, and ultimately help you steer your program in the right direction. To accurately estimate attribution, consider:

Activities by organizations or individuals you actively partner with within your work

Activities by other entities independent of your efforts, but with the same or overlapping goals or results

Macroeconomic, political, public health, or forces of nature which may influence outcomes

These kinds of questions can give you a better understanding of your attribution toward short and long-term goals. Understanding attribution doesn't mean discounting the legitimate impacts of your program. Rather, it means that to get an accurate (and honest) measurement, you must put your work in the appropriate context.

6. Create an accountability plan

Putting the time and effort into measuring impact doesn't mean much if you don't have an accountability plan. How will you hold your feet to the fire to ensure you not only deliver results but keep delivering?

Include the community

Making your goals public not only engages more folks in the work you're doing, it also ensures you'll go beyond the data to understand your program's successes and failures. Hold public gatherings and events in the community, during which time you can publicly state what your goals are and how you're going to achieve them.

Make a public pledge

A public pledge is a bold way to embrace accountability. For instance, the [Kresge Foundation](#) launched its "25% by '25" initiative in 2019, pledging that by 2025, one-quarter of its U.S. assets under management will be invested in female and diverse-owned firms. Instead of keeping this plan internal,

they've announced it widely and they'll have stakeholders and donors to answer to should they fall short.

Practice transparency

Celebrate your achievements, give praise where it's due, and share positive results to keep folks engaged and excited. But, it's equally important to be honest with the community and share when your org falls short of goals, and how you plan to address these issues.

Hire outside help when necessary

Sometimes outside help is needed to keep your org accountable and on track. For example, [Artist Trust](#), a nonprofit dedicated to supporting artists across Washington State, set public intentions around racial equity. Rather than relying on their internal team to measure progress, they hired an outside expert to conduct an audit of their work. This ensured the accountability audit was thorough, and allowed them to focus on their mission above all else.

Stay true to your mission

Building trust and fulfilling your mission are at the heart of accountability. Whatever goals you set, it's essential you stay true to your mission.

Take Nestle for example. The company released [a statement](#) in 2018 announcing its “ambitions to make 100% of its packaging recyclable or reusable by 2025.” Greenpeace and

other activists called the company out for failing to set clear targets, and in 2020 Nestle was still one of the top three polluters according to [#breakfreefromplastic's report](#).

If your plan is rooted in humility and honesty, it will go a long way in building trust with community members, employees, and customers.

7. Find inspiration in others doing the same work

You're not alone in your work. Other organizations are out there pushing toward similar goals in different communities.

Looking outward can provide a spark for you and your team.

Check out other programs and reach out to folks doing similar work. Other organizations can offer unique insights learned from experience and save you the pain of learning difficult lessons firsthand.

If other organizations have implemented successful measurement or accountability strategies, take note. Perhaps pieces of their program can serve as a model for yours. Check out these resources for some inspiration:

- [25 social impact examples from brands committed to change](#)
- [Innovations for Poverty Action's case studies](#)
- [Impact Project Management's resources and examples](#)
- [Stanford Social Innovation Review's articles on impact measurement](#)

You're not looking to replicate what others are doing; you want to have a distinct approach that is unique to your organization and mission. As you incorporate new strategies, consider how your team brings a unique set of skills and perspective to the work.



8. Gather qualitative and quantitative data

It's easy to get caught up in the numbers, but you want to make space for the stories too. When it comes to measuring impact, **people should be front and center**. Find ways to gather the narratives from folks involved in your program.

Utilize oral and video reporting to give people the chance to tell their stories in their own words. Provide numerous avenues for this type of reporting, from surveys to direct requests for interviews to the ability to submit recordings. This opens the door to compelling storytelling and helps build lasting relationships.

You can also **engage directly with the community**. Artist Trust is a great example of this, as they make it a top priority to chat with grantees on a regular basis to discuss their work. The nonprofit has moved away from formal reporting requirements and embraced a relationship-based approach.

“

I believe that for sure, numbers play a big part in how we're talking about things and how we're doing the 'work', but also understanding that experience is also as qualitative [important] as numbers and numerical impact. And so understanding that even though we're not asking [grantees] to report what they're doing, we're just asking them how they're doing, what is going on with them, how their art making is going. That's also important as we've got x amount of numbers doing x amount of things.



LUTHER HUGHES
Program Manager at Artist Trust

Lastly, don't be afraid to **leverage AI for data-based storytelling**. Many modern AI-powered tools are capable of pulling from user-uploaded datasets to help outline stories and identify trends. Coupled with your own qualitative research, you can quickly create compelling stories that feature your own survey results, and the words of the community you're helping.

Whether you opt for surveys, video interviews, or something entirely different, make sure you're always giving people the space for open-ended responses so they can share freely. This will set you up for receiving the best stories possible, and ultimately help you build lasting relationships over time.



7 principles for asking smart questions

As you reach out to grantees and program participants for feedback, let these principles guide you.



Prioritize the work

You're here to make a difference, not waste grantee time with lengthy surveys. Ensure any measurement program is respectful of the community's time and doesn't overshadow the work itself.



Do your part

Do the research, find publicly available data, and make verbal check-ins part of your process to minimize the work for your grantees.



Center people

Keep the human element of the work at the forefront. Not everything can be boiled down to a data point. Make questions open-ended and give folks room to tell their stories in their own words.



Embrace the complexity

Impact is complex and multi-faceted. Avoid the temptation to look for a neat, linear story and instead acknowledge the complexity of the issues you're working to address.



Think holistically

Be careful not to think of your program as an island. It is intertwined with the other work you do as well as efforts from other organizations.



Be humble

Stay open to feedback and seek out opportunities to keep learning. Be sure to include folks from the community to help you define success.



Apply an equity lens

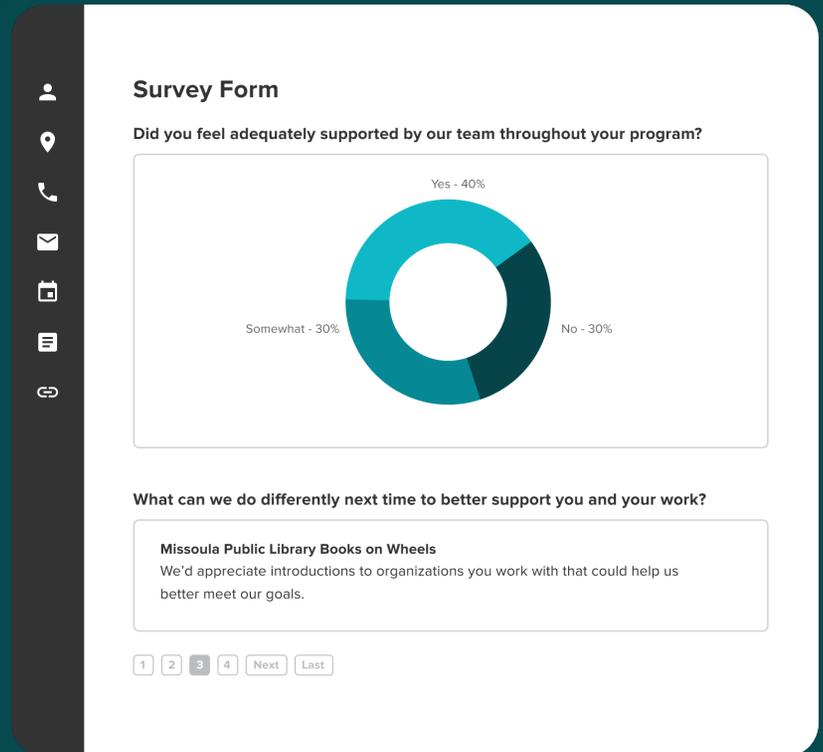
Interrogate existing frameworks and be active in pursuing equity across all parts of your program—from your application review process to which grantees you support.

9. Be open to feedback

In measuring the impact of your program, you might find some information that surprises you. Some of the feedback you get might even be difficult to hear. A lot of work goes into launching and managing your social impact program, and when things don't go as planned, it can be disheartening.

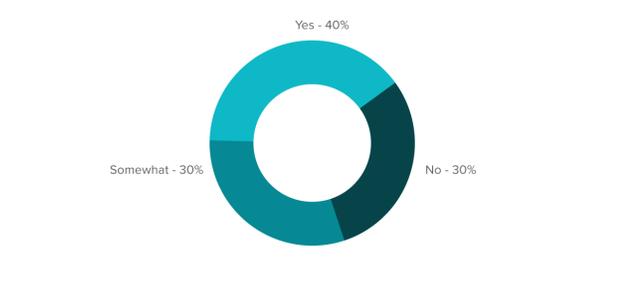
However, **seeking guidance from the community** and truly listening to what they say will strengthen your program and your organization as a whole. This is how you learn to be dynamic, to problem solve, and to own up to any mistakes you make.

- Use typeforms or other online surveys to provide a quick, easy way for people to submit feedback.
- Allow grantees to submit feedback via your email address, which should be available on any of your materials and clearly stated on your site.
- If you host events, have a Dropbox where people can provide feedback via paper.
- Consider having a hotline for feedback, giving the community the chance to call and make their voice heard.



Survey Form

Did you feel adequately supported by our team throughout your program?



Response	Percentage
Yes	40%
Somewhat	30%
No	30%

What can we do differently next time to better support you and your work?

Missoula Public Library Books on Wheels
We'd appreciate introductions to organizations you work with that could help us better meet our goals.

1 2 3 4 Next Last

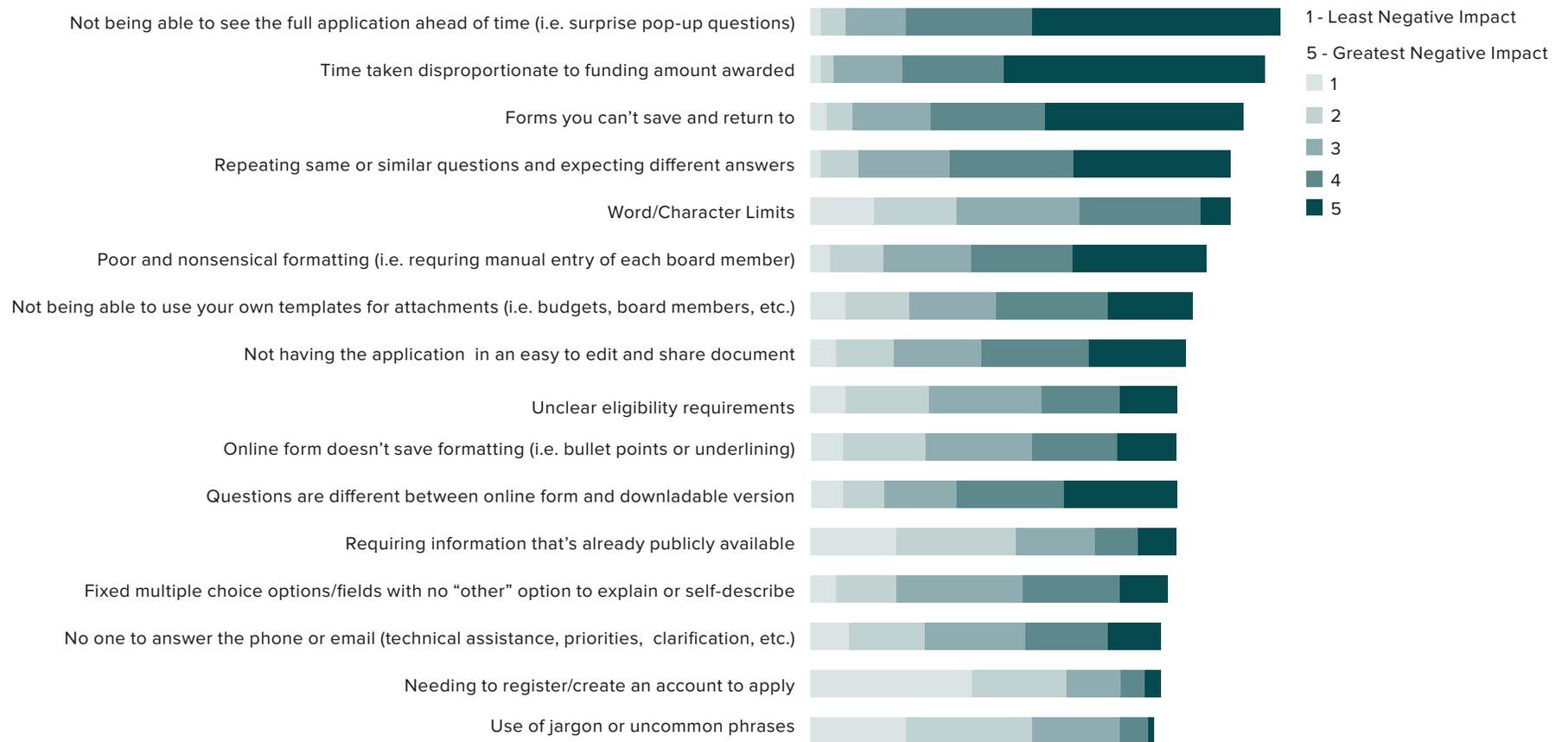
Stay open to feedback. Avoid becoming defensive, and instead try to approach the process from a place of humility. You and your team don't know everything and that's okay. Make the effort to continue learning as you go.

For example, the [Barr Foundation](#) made an effort to seek grantee feedback through an anonymous survey. After receiving mixed results, they sought to address the top three complaints. Grantees reported that the application and [reporting processes](#) were too complicated and confusing, that the foundation staff was not accessible enough, and that the grant structure was too inflexible. In response, the Barr Foundation team set new priorities to address these issues and framed it as an opportunity to improve the experience for the nonprofits they support.



10. Use data to make changes and reimagine what's possible

You've made the effort to gather feedback, both qualitative and quantitative. You've opened up lines of communication and built lasting relationships. But none of that means much if you don't **use that data to act**.



This graph from #FixTheForm shows the top pain points grantees identified as a barrier to seeking funding.



Analyze what you've heard from program participants and community members to **identify pain points or wasted efforts** and then work with your team to find solutions. Sometimes small tweaks can make a big difference. Another huge piece of trust-based giving is being there for the community when they need you—not simply handing over a check and disappearing. Collecting feedback shows the community you really are there to help.

For instance, the [#FixTheForm](#) movement launched by Kari Aanestad and Laura Solomons has gathered feedback

from more than 500 grant seekers. They have identified the biggest pain points in the grants application process. Now that this information is public, funders can work to reimagine their procedures to align with the data from the grantees and make things easier for those they seek to serve.

Remember to **be patient**. Don't restructure your entire program based on the first round of feedback. Some pieces might take time. But you should be open to reimagining your approach along the way to maximize your positive impact.

11. Find opportunities to expand your program

Once your program is up and running and you've had the chance to collect and analyze the data to understand what's working best, you want to think about ways to **expand your reach**. Would it serve the community to increase the capacity of your existing program? With the evidence of success, you'll have a great case for asking for more resources from your organization's leaders.

This is another area where AI-powered solutions can help. For instance, certain platforms are capable of using AI to analyze your program's performance to help you identify trends and missed opportunities. This can help you figure out where expansion makes sense, and where it doesn't.

If scaling up your program doesn't make sense, consider how you might use your program model to tackle other pressing issues. Perhaps you've created a blueprint that you can use to initiate additional programs.

You can also tap into outside resources. Now that you've positioned yourself as a trusted community partner, you can launch fundraising campaigns to bolster your efforts. Or you can look for other organizations that may want to team up.

Leveraging the data you collect to make an even wider impact ensures that you're investing time and money into **proven strategies**. Not only does this empower you to be a steward of your community, but it also allows you to serve as

a good example for others looking to engage in similar work.

Dave's Killer Bread is one company that has embodied this work. The team has long been dedicated to providing Second Chance Employment opportunities to folks with a criminal history. However, they expanded their reach in 2015 by launching the [Dave's Killer Bread Foundation](#) to help inspire the business community to implement Second Chance Employment more widely and to serve as a resource for others engaged in this work. And then, in 2022, Dave's Second Chance Hiring program was [acquired by Jobs for the Future](#). This allows for the organization to take its mission to entirely new levels, helping more people find work post-criminal record and drive further fair hiring policy changes.

Use the right tools to streamline your impact measurement

As essential as impact measurement is, the last thing you want is to divert time and resources away from the important programmatic work you're doing. Look to leverage tools that simplify data collection, analysis, and reporting.

Submittable is a [social impact platform](#) that allows you to incorporate impact measurement into your plan right from the start. With robust features that streamline data analysis, you can track results and build dynamic reports right in the platform. Find out more today.



About the authors



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