

Custom ImpactStory™

Most nonprofit leaders feel strong pressure to *prove* they are making an impact in the world. The stress of this expectation often results in complex, time consuming data collection, or even expensive, one-time, deep-dive program evaluations. This approach involves a lot of staff time, stress, overwhelm, and often leaves nonprofit leaders STILL scrambling to tell their impact story. But nonprofits simply should NOT be doing program evaluation; the ImpactStory™ Strategy is what they should be doing instead.

I've created the straightforward, uncomplicated, 3-step ImpactStory™ Strategy for being **clear** about what impact nonprofits are working toward, being **confident** in the data being collected (including how to understand it), and how to tell **convincing** impact stories that move people to action (to give, to volunteer, to change, to expand, to succeed). **Having uncomplicated data and narratives at your fingertips not only allows you to control the story, but it's a goal that's within reach - even in the complex and always moving real-world of nonprofits.**



Ultimately, tracking and using impact doesn't require any greater depth of knowledge and expertise than managing a budget. But budgets have a predictable shape and form, while tracking and using impact data does not and it evolves over time. I will customize the ImpactStory™ Strategy building on your nonprofit's existing structures and strengths so you have the tailored data structures you need. I then provide the staff training necessary for internal data capacity, and the ongoing quarterly coaching (ideally over 24 months) that ensures your team is able to evolve the data system as needed, respond to new situations and priorities, and have the opportunity to tell several impact stories before going it alone. All clients get lifetime access to the ImpactStory™ Network listserv to ask questions, build relationships, and share information.

Our Promise: You will have the sustainable yet flexible structures, systems, processes, and network of support in place to be confident about telling a clear and convincing impact story anytime and to anyone.

Structural Build Out (Month 1)

- We will facilitate a 90-minute meeting to create a branded Strategic Impact Map™, plus a free copy of Strategic Impact Map™ Guide.
- We will create up to two Impact Statements, plus free access to any existing Impact Statements in our ImpactStore.
- We carefully review existing impact surveys and other data collected, take out questions/data not needed, add questions and data that are missing to collect immediate impact most effectively. This involves a 60-minute meeting.
- We review existing productivity data collection to ensure all the right data are being collected.
- We create a full set of all data collection surveys and tools (as needed), and teach you how to use them. This involves a 60-minute meeting
- We review all data collection processes and streamline them to collect data most efficiently. This involves a 60-minute meeting.
- We create any needed Excel/GoogleSheets and Forms for collecting the data.
- We create processes for data entry. This involves a 60-minute meeting.
- You go forward collecting data.

Capacity Building Training (over the course of the following 11 months)

- Teach the essential Excel formulas (and provide tutorials from Depict Data Studio); do the first round of analyses together. This can be done together, simultaneously; or you can do analysis and we can review it.
- Teach the essentials of internal data visualization (and provide tutorials from Depict Data Studio); do the first set of visualizations together. This can be done together, simultaneously; or you can do analysis and we can review it.
- Teach the essentials of external data visualization (and provide tutorials from Depict Data Studio); do the first set of visualizations together. This can be done together, simultaneously; or you can do analysis and we can review it.
- Training in creating dashboards that can be used ongoing.
- Guidance on facilitating a Data Insight Team. This involves a 60-minute meeting.
- Co-facilitate a Data Insight Team meeting using the analyses and data visualizations you created. This is a 90-minute meeting.

Sustainability and Success Coaching (over the course of 24 months)

- 8 one-hour quarterly check-in coaching meetings with key staff to review progress, problem solve, evolve, and set new goals.
- Unlimited emails and 30-minute calls/zooms to solve problems and answer questions as they come up.

A la Cart (additional cost to be determined)

- Facilitated data cleaning meeting
- Deeper training in any area
- Database creation using the database of your choice (experience in Apricot360)
- Data analysis services for data with more than 500 records, including saved code to rerun anytime
- Support with program development

Material Deliverables

- ✓ Branded Strategic Impact Map; plus the [Guide](#) so you all can update it yourself when needed and translate it back to a logic model or theory of change
- ✓ Program Specific Impact Statement
- ✓ Updated Surveys
- ✓ Excel Templates for graphing data
- ✓ Data Insight Team meeting agenda
- ✓ Two-year dashboards that can be expanded to additional years

Knowledge Deliverables

- ✓ Staff know do's and don't's of survey development
- ✓ Staff know how to do basic data analysis and graphing in Excel and can use this as templates for the future
- ✓ Staff know how to connect client narratives with data for story telling
- ✓ Staff know how to adapt and evolve surveys and analyses over time
- ✓ Staff know how to facilitate a meeting to understand the data and plan action
- ✓ Staff have the confidence to move forward