

# ImpactStory™ Offerings

Isn't time you had your impact story at your fingertips?

## Ways to work with us



**PARTNERSHIPS for  
STRATEGIC IMPACT** *Real Life. Real Results.*

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## PARTNERSHIPS for STRATEGIC IMPACT

*Real Life. Real Results.*

Partnerships for Strategic Impact® empowers small- and medium-sized nonprofits – and their funders – to track and tell powerful impact stories. We build customized and sustainable structures, systems, and processes for data collection, train staff in data analysis and storytelling, and provide ongoing coaching aimed at ensuring long-term success.

We partner with clients to use impact to promote democracy, social justice, equity, and returning power to those who have been disenfranchised.

[www.impactstorycoaching.com](http://www.impactstorycoaching.com)



## Join the Community

[bit.ly/psi-list](https://bit.ly/psi-list)



# ImpactStory™ Strategy



Many nonprofit leaders feel strong pressure to *prove* their work is making an impact. They often invest in time consuming data collection and/or expensive, one-time, deep-dive program evaluations. This approach is complex, involves a lot of staff time, can disrupt service provision, and often **leaves nonprofit leaders still not knowing how to use their data or tell their impact story**. In fact, some recent social sector surveys show that less than 20% of nonprofits feel confident about their data collection, creating actions, and/or storytelling. Likely

connected, there's also data showing up to 33% of smaller nonprofits are not meeting their fundraising goals. **Why does tracking and communicating impact have to be more difficult than managing the budget?**

I've worked for years trying to force program evaluation science to fit the realities and practical needs of my nonprofit clients. Then, I realized the difference between scientists and practitioners...

**Nonprofits are practitioners, not scientists.** They need to know what's been proven to work, assess client needs, deliver effective programs, and make sure clients gain the expected benefit.

Your general practitioner doesn't work as a scientist, but they know what's been proven to work, they assess your needs, and they deliver effective medicine. They make sure you get better, but they are not expected to demonstrate the medicine was the thing that *made* you better or that you'll stay better long-term.



*...we are **financially stronger** and have created a model that other organizations have contacted us to replicate; we have a Strategic Plan for the future...the list just goes on and on...*

- Kim Hyland, Executive Director,  
Fluvanna/ Louisa Housing Foundation

**Nonprofits need uncomplicated tools and systems for tracking, using, and telling meaningful impact stories. They need their impact story at their fingertips - even in the world of overstretched, always moving, real-world, on-the-ground work.**

Despite the need, there is not an established structure for what tracking, using, and telling these actionable impact stories should include, or what resources, systems, and skills are necessary.

This is why I created **the straightforward, uncomplicated, 3-step [ImpactStory™ Strategy](#) for gathering and using actionable impact** – data that moves people to action: clients to achieve, funders to give, volunteers to connect, staff to track progress, programs to improve, and leadership to succeed. **Tracking and using impact shouldn't require any greater skill than managing a budget.** Scan the QR code to [take a self-assessment](#) about where in the Strategy you're rocking it and where you could use more help.



Not the practice of science, but informed by science, the [ImpactStory™ Strategy](#) gives nonprofits – and their funders – the ability to be **clear** about the specific impact they are working toward, **confidence** in the impact data being collected and how to understand it, and the tools for telling **convincing** impact stories that move people to action.

**Map Out Your Strategy**  
*clear*

1

**A Solid Framework**  
A [Strategic Impact Map™](#) connects your mission to immediate impact and how that contributes to community-wide change.

**Programs that Work**

Show your programming is rooted in what’s known to work with a custom [Impact Statement](#).

**Gather the Pieces**  
*confident*

2

**Smart Surveys**  
Efficient surveys ask key questions that help you tell your story and allow your clients to give you feedback.

**Painless Data Analysis**

Learn just the handful of Excel formulas, bar charts, and line graphs. An Impact Team turns your data into action.


**Tell Your Story**  
*convincing*


3


**Powerful DataViz**  
Create the graphics to tell your impact stories: a Director’s Report with dashboards, an Annual Report, a graphic one-pager, and a grant narrative.


**Masterful Impact Stories**


The client narratives gives an impact story life, and the data builds trust, credibility, and ultimately moves people to action.


 A solid framework for creating **clarity around what you do** and don’t do so you can manage mission-drift.

 A **strong case** for funders to invest in your work because you know the long-term changes clients will be empowered to make.

 The confidence to talk about **return on investment** to everyone invested in your mission.

 Impact rooted in science which **builds trust** with the people you serve, your partners, and other stakeholders.

 The ability to **motivate staff** to set and reach productivity and impact goals.

 Valid, meaningful data to **guide decision making** for program development, addressing challenges, and setting priorities.



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# ImpactStory™ Academy

Ultimately, my goal is your goal – to successfully fulfill your mission. My investment in this goal is to ensure you have all the information, tools, and resources to set up the ImpactStory™ Strategy and get it working for you. Rather than just providing you with a one-time service, I'm committed to the sustainability of what's put into place.

Twice a year, I offer a 9-week ImpactStory™ Academy. The Academy provides all the information, tools, and resources you need to put the ImpactStory™ Strategy to work at your organization. Because I'm focused on your sustainability, all sessions and materials are recorded and saved in a GoogleDrive folder (forever!), so you can go back and refresh your memory or train new staff. All participants also get free and forever access to the **ImpactStory™ Network**, an invitation-only peer network, moderated by me, for asking questions, building relationships, and sharing information.

The ImpactStory™ Academy is best for an organizational leader(s) who are going to take charge of putting the systems and processes in place.

The price is **\$1,297 per organization** – attend by yourself or bring everyone you want!

## Who Should Attend

- Executive Director
- Development Director
- Marketing Director
- Program Supervisor
- Director of Community Engagement
- Data Manager

## You'll Get the Most Out of the Academy if You Already Have

- A commitment to using data to tell powerful impact stories.
- The ability to come to every class and do homework between classes.
- Basic Excel skills and are not (very) afraid of numbers.
- Curiosity and a growth-oriented perspective.

## What You Walk Away With

You'll leave with all the information, tools, and resources needed to put the ImpactStory™ Strategy to work at your organization. Included are:

- ✓ Six 90-minute classes, plus 15 minutes before and after each class for questions and networking, 2 sets of office hours to ask questions, and a 1-hour orientation. A total of 17 hours of live learning.
- ✓ Pre-recorded, 15- to 30-minute videos, exclusive to the Academy, which take deeper dives into special topics (e.g., how to improve response rates, how to adapt evidence-based programming to meet your needs, what to do with open-ended responses, etc.). I'm always making new videos.
- ✓ A 60-page workbook and toolbox including lots of additional resources, tips, and ideas.
- ✓ A complete Strategic Impact Map™.
- ✓ A revised survey.
- ✓ Lifetime access to a class-restricted Google folder with recordings of all the sessions, as well as all the materials from each session.
- ✓ All participants also get free and forever access to the ImpactStory™ Network, an invitation-only peer network, moderated by me, for asking questions, building relationships, and sharing information.
- ✓ Confidence, motivation, and support in putting the ImpactStory™ Strategy to work at your organization.

*I just want to express that the clarity and soundness of reasoning that your map and documents brought to our work has been TRANSFORMATIONAL as it has literally reframed some of the work that development is doing. We are no longer being treated as unhelpful antagonists by development, and in large part the way your work encapsulated ours from a big-picture perspective helped us get there! Thank you thank you!...*

- Rose Cole, Director of Community Engagement, Madison House

*My interest in storytelling drew me to the Academy, but I didn't realize how personal and practical the Academy was going to be. I expected something more cookie cutter. Maryfrances did a really wonderful job of linking the sessions not just to our individual organizations, but to what we were working on in the moment. That was really refreshing and really valuable.*

- David Worrell, Board of Directors, BookEnds

*Just before the Academy, I was given a promotion and didn't know all it was going to entail yet. Throughout the Academy I was discovering things I could do in my new role that I hadn't considered before. For example, we have all these surveys, and I'm going to re-evaluate all our surveys so there's consistency and cohesion among them. Every session there was something where I thought, "Oh gosh, I can take this and run with this." Everything was very accessible, and I've been immediately able to turn it into action and productivity. I am really appreciative this class happened when it did.*

- Randy Rogers, Assistant Director, Jefferson Area Board on Aging

*This is a master class. This is really, really dynamite information! Thank you!*

- Elizabeth Borst, Virginia Fresh Match Advocacy Director

# ACADEMY SYLLABUS

## Orientation – ImpactStory™ Strategy and welcome (week 1)

### STEP 1 – Map Out Your Strategy

#### Class 1 - Strong Frameworks (week 2)

Introduction to each other and the academy structure; [Strategic Impact Map™ Part 1](#)

Lesson	How a Strategic Impact Map™ is helpful. Introduce case study.
Interactive Discussion	Complete and discuss workbook page on community-needs, vision, and mission.
Take Aways	Knowing how to connect community-level need, vision, and mission as a framework for your organization.
Homework	Use your workbook to make a list of all your nonprofit's programs and resources.
Resources	(1) class list, (2) <a href="#">Strategic Impact Map™ Guide</a> (ImpactStory™ exclusive), (3) resources on Logic Model and Theory of Change

#### Class 2 - Programming that Works (week 3)

[Strategic Impact Map™ Part 2](#)

Lesson	The power of evidence-based programs and how to adapt them to what you do. How a set of mission-driven solutions addresses a community-level need. Learn how <a href="#">Impact Statements</a> allow you to talk to funders about their long-term return on investment.
Interactive Discussion	Workshop writing mission-driven solutions in your Strategic Impact Map.
Take Aways	How connecting your mission-driven solutions to specific impact is key to being clear about the long-term impact of your impact story.
Homework	Use your workbook to complete your Strategic Impact Map™.
Resources	(1) lists of evidence-based practices websites, (2) free access to all Impact Statements (ImpactStory™ exclusive), (2) sample Strategic Impact Map, (3) blank Word templates for Strategic Impact Maps™ (ImpactStory™ exclusive)

#### Office Hours #1 - Working on your Strategic Impact Map™ (week 4)

- ✦ Come talk about building your own Strategic Impact Map™. Bring your drafts, bring your questions, learn from others.
- ✦ First come, first serve; 1 hour of group coaching
- ✦ Additional hours will be added depending on the number of Academy participants.



## STEP 2 – Gathering the Pieces

### ***Class 4 - Smart Surveys (week 5)***

#### *Essential Survey Do's and Don't's*

Lesson	What makes a great survey, how to create survey questions designed to tell your impact story, response rates, and (happy dance!) you only need to do post surveys. When surveys aren't enough.
Interactive Discussion	We edit some surveys together and share experiences about what survey techniques have worked participants' nonprofits.
Take Aways	Smart surveys are the basis for getting the statements you need to tell your impact story.
Homework	Use your immediate impact to write (or edit existing) survey questions that are designed to tell your impact story.
Resources	(1) additional survey resources, (2) how to conduct focus groups (ImpactStory™ exclusive), (3) how to do interviews (ImpactStory™ exclusive)

### ***Class 5 - Painless Data Analysis (week 6)***

#### *No Statistics Required*

Lesson	What do you do with surveys once you've collected them?!? Data analysis does not have to be scary: you need less than 12 Excel formulas (no statistics!) and three types of graphs. Also learn about the power of Insight Teams.
Interactive Discussion	Bring your laptop so you can practice creating your own graphs; discuss how to interpret data, what to do with "bad" news, and data ethics.
Take Aways	How to do manageable data analysis and confidently interpret your results.
Homework	Use sample raw data file to practice your new skills.
Resources	(1) Excel lessons in everything you need, (2) a sample Excel workbook with examples of data analysis and graphs, (3) Insight Team guide and agenda (ImpactStory™ exclusive)

### ***Office Hours #2 – Perfecting your surveys (week 7)***

- ✧ Come talk about building your surveys. Bring your drafts, bring your questions, learn from others.
- ✧ First come, first serve; 1 hour of group coaching
- ✧ Additional hours will be added depending on the number of Academy participants.



### STEP 3 – Tell Your Story

#### **Class 5 - Powerful Data Viz (week 8)**

##### *Data that Looks like a Million Bucks*

Lesson	Also learn the essential principals of clear data visualization, and how to use them in the four essential types of impact stories: Director’s Reports, Annual Reports, One-Pagers, Grant Narratives.
Interactive Discussion	Review some data visualization examples and discuss what you like and what you don’t like.
Take Aways	What it takes to have a clear data viz that can be used for inward facing (audience = executive director, staff, board) and outward facing (audience = funders, public) impact storytelling.
Homework	Look at your last annual report and identify three things you'd change.
Resources	Data visualization resources from Depict Data Studio and others.

#### **Class 6 - Masterful Impact Stories (week 9)**

##### *Impact Stories that Move People to Action*

Lesson	Marrying data and narratives for deeper, more convincing impact stories: Director’s Reports, Annual Reports, One-Pagers, Grant Narratives. Impact stories can also be used to motivate staff!
Interactive Discussion	Given (a) the case study Strategic Impact Map, (b) a one-page Data Viz for outreach, and (c) a one-page dashboard – practice helping a board member with their elevator pitch for donors.
Wrap up	Write down the most pressing demand for impact stories in your organization right now. Discuss what you have learned that you can now use to meet that demand, and what’s <i>the very next thing you’re going to do</i> to implement the ImpactStory™ Strategy.
Take Aways	How to tell an impact story in a way that moves people to take action; a plan for moving forward with the ImpactStory™ Strategy at your nonprofit
Homework	Take your next step.
Resources	Invitation to continue to use the ImpactStory™ Network listserv to ask questions, exchange information, and build relationships

# ImpactStory™ Custom Coaching

Some organizations want more support and/or they know without a workplan things sometimes don't get done. If you would like me to work with your organization one-on-one, I will create a workplan for us to meet regularly to customize all the systems, processes, and tools. Once these things are in place, I'll stay with you for several more months, just to make sure staff are confident they can keep it going and evolve it over time. The ImpactStory™ Academy – and all that is included – is free with Coaching.

We will begin by assessing your what you specifically need. I then build a workplan on the existing structures and strengths. In the first 12 months, I provide all the staff training necessary for to build internal capacity, and ongoing quarterly coaching check-in's. In the second 12-months, I ensure your team is confident, capable, and practiced in all aspects of the Strategy. They will be able to evolve the data system as needed, respond to new situations and priorities, and have the opportunity to tell all your impact stories.

All clients also get free and forever access to the **ImpactStory™ Network**, an invitation-only peer network, moderated by me, for asking questions, building relationships, and sharing information.

## Coaching is for You if You Already Have

- ✓ Your organization has a staff person (the Data Manager) who can dedicate an average of 2-5 hours per week to managing the data and who has at least moderate Excel skills. Just like when writing grants or annual reports, this staff would need additional hours when doing annual data analysis and action planning.
- ✓ A group of people in leadership, including the Data Manager, who can form your organization's Insight Team to advance the process through the organization.
- ✓ Your Board and Executive Director are 100% bought in to the need for accurate, timely impact data they can review regularly.
- ✓ Your organization has a commitment to using data to tell powerful impact stories.
- ✓ Your organization has a curious and a growth-oriented perspective.

### My Promise

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

## What You Walk Away With

- ✓ The structure and support to put the ImpactStory™ Strategy in place, and training for your whole team.
- ✓ Branded [Strategic Impact Map™](#); plus the [Strategic Impact Map™ Guide](#) (ImpactStory™ exclusive) so you all can update it yourself when needed and translate it back to a logic model or theory of change.
- ✓ Organization-specific [Impact Statement](#) that allows you to communicate why your programming is expected to support long-term change.
- ✓ A crosswalk connecting your Strategic Impact Map to the specific data you collect.
- ✓ Updated Surveys and other data collection tools.
- ✓ FREE participation in the [ImpactStory™ Academy](#).
- ✓ Free and forever membership in the **ImpactStory™ Network** email forum of peers, moderated by me, for support and answering questions.
- ✓ Staff know do's and don't's of survey development so they can evolve surveys over time as needs change.
- ✓ Staff know how to do essential data analysis and graphing in Excel and can use the templates developed for the four main types of impact stories: Director's Report, Annual Report, One-Pager, Grant Narrative.
- ✓ Excel Templates for analyzing and graphing your data.
- ✓ Essential set of dashboards that can be expanded in years to come.
- ✓ Insight Team meeting agenda for understanding the data.
- ✓ Staff know how to facilitate an Insight Team meeting to understand the data and plan action.
- ✓ Staff know how to connect client narratives with data for storytelling.
- ✓ Staff have the confidence to move forward.
- ✓ The philanthropy department is clear and confident about exactly what programming leads to which impacts, as well as the productivity and impact data from which they can easily draw.

# SAMPLE COACHING PROCESS

## Year 1

### Building Out Data Collection Structures and Processes (Months 1 – 2)

*This is typically about 15 hours of work by the Data Manager & about 5 hours with the Insight Team*

#### Launch

- **1-hour meeting** for Insight Team Kick-off, intro to model, confirm work plan
- The Insight Team may include: Executive Director, Board member invested in data collection and impact, a person designated to be the Data Manager, Program Manager/Supervisor, Development Director/Grant Writer, Director of Community Engagement, Marketing Director

#### Strategic Impact Map™ Construction

- Free copy of the [Strategic Impact Map™ Guide](#)
- **2-hour meeting** to train the Leadership Team in the Strategic Impact Map and start construction
- **2-hour meeting** with the Leadership Team finish Map construction and wordsmithing
- Maryfrances produces a branded Strategic Impact Map™

#### Impact Statement Creation

- Maryfrances conducts background research and creates the Impact Statement which succinctly summarizes the research backing up the organizations programming as being effective in the long-term
- **1-hour meeting** with the Leadership Team to review the Impact Statement and to talk about how to use it

#### Data Inventory and Survey Development

- **1-hour meeting** with the Data Manager to provide Maryfrances with all the current data collection and surveys used
- Using the Strategic Impact Map™ and Impact Statement as guides for (a) reviewing existing data collection and surveys and (b) creating new ones to ensure all the immediate impact data is efficiently collected
- Maryfrances reviews and sorts the data into the productivity and immediate impact as outlined in the Strategic Impact Map™ and Impact Statement
- Maryfrances creates any new surveys and forms needed (on paper, GoogleForms, GoogleSheets, or GoogleDocs)
- **2-hour meeting** with the Data Manager to review the surveys and forms for completeness
- **2-hour meeting** with the Data Manager and a Program Director to review sorting of productivity and impact data and talk about surveys and systems needed for it to be efficiently and effectively collected

### Data Entry Training

- **2-hour meeting** with the Data Manager and Program Director to go over data entry and how to train staff and need for data cleaning meeting

### Preparing for Moving Forward

- **1-hour meeting** with the Insight Team to set goals for coaching meeting #1, set dates for three more coaching meetings

## **Year 1 Sustainability Coaching (Months 3 – 12)**

*This is typically about 5 hours of work on behalf of the Data Manger with Maryfrances, plus their work to implement the plan & about 2 hours with the Leadership Team + additional support requested*

- **Three 1.5-hour coaching meetings** with the Data Manager and/or the Insight Team depending on questions and goals
- Unlimited email support
- Free and forever membership in the **ImpactStory™ Network**

## **Year 2**

### **Building Out Data Analysis and Impact Storytelling Structures and Processes (Months 13 – 14)**

*This is typically about 15 hours of work by the Data Manger & about 5 hours with the Leadership Team*

#### Data Analysis

- **1.5-hour meeting** with the Data Manager to teach the basics of Excel data analysis and what a Insight Team does (includes list of additional on-line tutorials)
- **2-hour meeting** with the Data Manager to co-create core dashboards in Excel
- **3-hour meeting** with the Data Manager for supported co-data analysis in Excel
- Additional review of dashboards and graphs, including suggestions for how to enhance them

#### Data Visualization

- **2-hour meeting** with Data Manager to teach the basics of data visualization in Excel (includes a list of additional on-line tutorials)
- Additional review of graphics, including suggestions for how to enhance them

#### Data Interpretation

- **1-hour meeting** with the Data Manager to prepare for the first Insight Team meeting
- **1.5-hour meeting** co-facilitated with the Data Manager of Insight Team (probably the Leadership Team members)
- Maryfrances writes up summary of the Insight Team meeting as example for going forward
- **1-hour meeting** with Data Manager to review how to present dashboard to the Board/staff

#### Impact Storytelling

- **2-hour meeting** with the Insight Team to co-draft an impact story report

#### Preparing for Moving Forward

- **1-hour meeting** with the Insight Team to set goals for coaching meeting #4, set dates for 3 more coaching meetings

#### **Year 2 Sustainability Coaching (Months 15 – 24)**

*This is typically about 5 hours of work on behalf of the Data Manager with Maryfrances, plus their work to implement the plan & about 2 hours with the Leadership Team + additional support requested*

- **Three 1.5-hour coaching meetings** with the Data Manager and/or the Insight Team depending on questions and goals
- Unlimited email support
- Free and forever membership in the **ImpactStory™ Network**

## COST

### **Cost**

Once I have reviewed what's already in place, I will create a custom proposal. Factors in customizing the costs include the volume of data collected each year, the robustness of current data collection strategies, and existing staff expertise in Excel and the databases used by the organization. The first half is due at the beginning of the first year, and the second half is due at the beginning of the second year.

### **What is NOT Included (additional cost to be determined)**

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

# Philanthropist Supported ImpactStory™ for Nonprofits

## ImpactStory™ Academy and Custom ImpactStory™ Coaching for Nonprofits

I offer **two solutions** for the nonprofits you fund do not have the systems or expertise to easily and consistently provide high-quality impact data.







The [ImpactStory™ Academy](#) is an 9-week, intensive experience which provides nonprofits with all the information, tools, and resources they need to implement the ImpactStory™ Strategy at their organization. They also get a free and forever network of support through the ImpactStory™ Network.

I offer the **Academy twice a year.**

[One-on-One Custom ImpactStory™ Coaching](#) is typically a two-year supportive relationship where nonprofits get all the training and support they need to develop and run sustainable, yet flexible, structures, systems, processes for tracking and telling impact stories. They also get a free and forever network of support through the ImpactStory™ Network.

I coach **just five nonprofits per year.**

## PHILANTHROPISTS & NONPROFITS BENEFIT

-  A solid framework for **creating clarity** around what you do and don't do so you can manage mission-drift.
-  A **strong case** for others to invest in your work because you know the long-term changes clients will be empowered to make.
-  The confidence to talk about **return on investment** to everyone invested in your mission.
-  Impact rooted in science that **builds trust** with the people you serve, your partners, and other stakeholders.
-  The ability to **motivate nonprofit staff** to set and reach productivity and impact goals.
-  Valid, meaningful data to **guide decision making** for program development, addressing challenges, and setting priorities.

# ImpactStory™ Custom Coaching for Philanthropists

Funders of nonprofits are investing in nonprofits because they want to be part of the solution and contribute to making real and lasting impact in their community. They also must communicate the return on the investment to boards of directors, shareholders, investors, funding contributors, and colleagues – **all philanthropists want to know what meaningful change is happening**. This is especially true for corporate CSRs whose shareholders and investors may be contributing to impacts they did not directly choose.

Sometimes you need to tell detailed impact stories about how funding is contributing to improving community conditions (for example, when talking to boards or individual funding contributors). Other times you need simple, big, bold impact stories to use in public facing messages (for example, on a website or in a slide desk).

Telling these impact stories often means complex, time consuming data collection from the funded nonprofits, all of whom collect different things with different measures, and often without a lot of consistency over time.

- ✧ **What if you could just know the real, on-the-ground change happening every day?**
- ✧ **What if you could be sure nonprofits were using the best programming and collecting the most meaningful data?**
- ✧ **What if you were confident about combining data from different nonprofits so you could tell *your* impact story?**

## **This is Within Reach**

- ✓ You can articulate the specific impacts you are seeking, as well as the strategies most likely to result in impact.
- ✓ You can have two to five Principal Impacts to talk about the impact you are contributing to in the community.
- ✓ You can have Excel templates so Grants Managers can gather and combine impact data from the nonprofits you fund.

**Philanthropists gain sustainable structures, systems, and knowledge allowing them to responsibly and confidently telling a simple, clear, meaningful, and convincing stories about the impact and value of the successes you are supporting.**



## What You Walk Away With

- ✓ A simple, one-page articulation of your investment strategy and what you expect the immediate impact, longer-term change, and community-level impact to be. This will be in the form of a Strategic Impact Map™.
- ✓ A simple, one-page documentation of the academic research and other evidence supporting why your investment strategy will likely generate the short- and long-term return on investment (i.e., the measurable goodness and change achieved). This will be in the form of an Impact Statement.
- ✓ The articulation of two to five Principal Impacts, which reflect the main impacts from your funding strategy (in single, clear numbers), and which you can collect and report year after year.
- ✓ A complete Excel workbook that guides Grants Managers in collecting the key impact data you need from your nonprofit partners. This workbook will automatically calculate your Principal Impacts.
- ✓ Coaching and support for your Grants Managers as they collect data from nonprofits in progress and/or final reports.
- ✓ A template for a static impact dashboard that can be populated year after year so your leadership and stakeholder can track progress over time.

## The Process

1. Introductory meetings to establish the specific need, scope, time frame, and cost for the project.
2. Creation of Strategic Impact Maps™ with your team.
3. Creation of the Impact Statements which allow you to articulate both your investment strategy and why it is expected to make an impact, respectively.
4. I interview all the nonprofits you fund to understand what data they already collect that speaks to the impacts you care about most.
5. I create Excel workbooks to guide the collection of data from nonprofits, and which automatically roll-up and calculate the Principal Impacts.
6. I provide ongoing coaching and support, so your team is confidently able to understand and use the data collected.
7. I create templates for static dashboards that will allow leadership and stakeholders track progress over time.

## The Benefit

- Celebrate the success and value of the work you fund.
- Be responsible stewards of the data, neither under- nor over- stating the data's significance.
- Track and assess the impact of your giving over time so you can make strategic adjustments and/or provide additional support where it is most needed.

# Maryfrances Porter, PhD



I am the CEO and Founder of Partnerships for Strategic Impact® and bring 25 years of experience in research, as well as with working with nonprofits, foundations, and local governments. I have extensive experience in program development and program evaluation; grant writing; and developing strategic vision and action. I have championed local change initiatives with nonprofit leaders, completed the research, wrestled with the issues, mastered the statistics, and done the front-line work.

After completing my B.A. at Emory University and my Ph.D. in clinical and community psychology at the University of Virginia, I was the Coordinator of Research and Planning for the Charlottesville/Albemarle Commission on Children and Families. I was then the Program Director for Program Evaluation and Community Consultation at Youth-Nex, the Center for Positive Youth Development at the University of Virginia.

In the 10 years since launching Partnerships for Strategic Impact®, I have worked intensely with dozens of nonprofits and philanthropists, so they are able to clearly, confidently, and convincingly tell their impact stories. Today, in addition to being a consultant, I am a licensed, clinical psychologist specializing in treating anxiety and supporting people who are neurodiverse.

Through Partnerships for Strategic Impact®, I specialize in empowering small- and medium-sized nonprofits to own their impact stories. I build customized structures, systems, and processes for data collection, train staff to build capacity in data analysis and storytelling, and provide ongoing coaching aimed at ensuring long-term sustainability and success.

I also work with foundations and corporate CSRs in joining nonprofits in telling masterful impact stories.

Partnerships for Strategic Impact® partners with clients to use impact to promote democracy, social justice, equity, and returning power to those who have been disenfranchised.

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Schedule 30 minutes with me: [https://calendly.com/impactstory/impactstory\\_information](https://calendly.com/impactstory/impactstory_information)

**I am available to do talks, trainings, and keynotes.**

