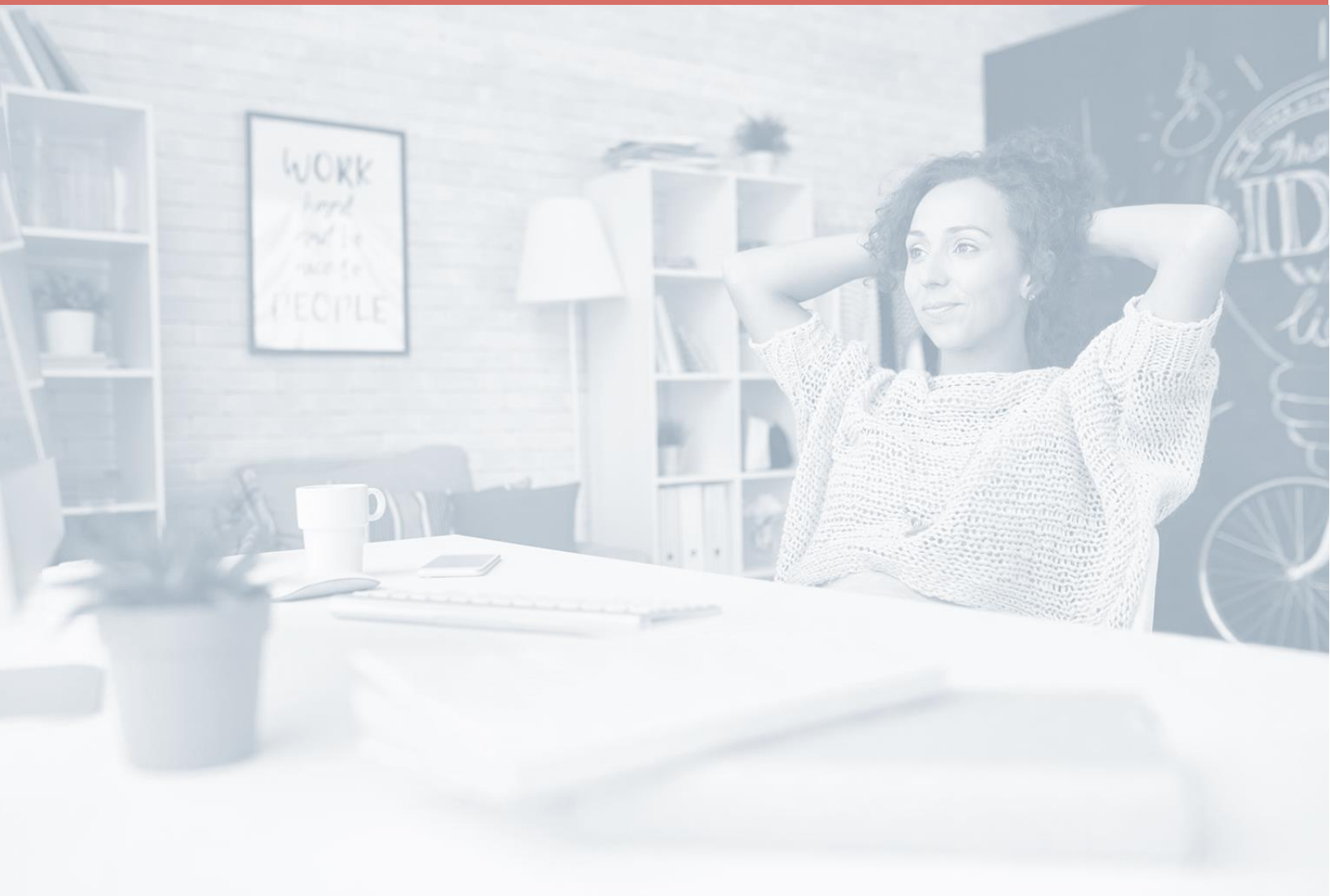# ImpactStory™ Academy

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

PARTNERSHIPS for **STRATEGIC IMPACT**

Real Life. Real Results.

The **ImpactStory™ Strategy** emerged from **my work and learning with local nonprofits and their funders over the last 20+ years**. The Strategy is unique because it transforms the science of formal program evaluation into a process accessible to even small organizations. **The structure makes the process of tracking and using impact manageable.** Here are some key features:

No More Trying to *Prove* Long-term or Systems Change

Nonprofit professionals are practitioners, not scientists. Just like a family doctor prescribes medicine science has already shown reduces symptoms and cures infection, a nonprofit delivers a program science has already shown results in immediate impact and likely results in longer-term change[1] (e.g., high-quality preschool teaches toddlers skills which are likely to result in later school success).

Neither nonprofits nor funders need to collect data showing the immediate impact helps people in the longer-term, that's already been done by the program evaluation scientists. It's enough to deliver the program and show that people got the intended benefit (e.g., skills taught in preschool).

Funders successfully partner with nonprofits when they both value the same immediate benefits (e.g., skills taught in preschool), and when those **immediate impacts are aligned with the funder's vision for systems change** (e.g., learning skills in high-quality preschool has been shown to lead to longer-term change including later school success, as well as being more likely to hold a job and have higher earnings by age 40; multiple people achieving of longer-term change contributes to a vision of reducing poverty).

No More Struggling to Define Success

Measurable success is reflected by **three, key immediate impacts**:

Immediate Impacts	Example
(1) the **amount of benefit clients got** from the program	✓ preschoolers learned the desired skills by the end of the program
(2) clients **plan to use what they got** in the future	✓ preschoolers are going on to elementary school
(3) clients were **satisfied with the program**	✓ the preschool is a place parents want to send their toddlers

No More Mystery About How to Use Data

Statistics are for scientists. Basic analysis requires only simple math and two graphs. But the real power of analysis lies in **a simple, collaborative process for turning data into knowledge about what's contributing to impact and**

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[1] Because there are an infinite number of human struggles and a finite number of evidence-based programs, and because communities are unique, nonprofits often need to tailor programs. Even in these cases, there is almost always thought leadership (scientific or otherwise) that can be used to support the link between immediate impact and longer-term change. When longer-term change really needs to be proven, *that's* a time to partner with a program evaluation scientist. Even then, the ImpactStory™ Strategy can be used for the purpose of tracking and using immediate impact for the people served.

where something different is needed. This knowledge can be used to support staff in better helping clients achieve goals, to improve programs, to help funders understand the value of their investment, and to engage volunteers and partners in collaboration.

There you have it. As straightforward to build and use as a budget, the strategy facilitates collaborative learning and knowledge building. **This knowledge allows social sector partners to be responsive to community needs, set goals, and effectively improve programs on a path toward a vision for systems change.**

The Structure and Toolkit

The three-step **ImpactStory™ Strategy** includes a toolkit of instructions, tools, resources, and examples essential for its implementation.

The Strategy allows nonprofits and funders: to be *CLEAR* about the immediate impact and vision they are working toward, to be *CONFIDENT* in the data being collected and how to understand and use it, and to tell *COMPELLING* impact stories that move people to action: clients to achieve, staff to track progress, programs to improve, funders to invest, volunteers to connect, and partners to collaborate.

The Strategy is used to track mission fulfillment on a path to a vision for systems change. When the Strategy is in place, social sector partners *always* have **their impact story at their fingertips**.

Map Out Your Strategy **1** *CLEAR*	**A Solid Framework** A Strategic Impact Map™ elegantly connects mission to immediate impact and then to a vision for systems change. *All the links are clear.*	**Programs that Work** An Impact Statement clearly states why programs are expected to result in short- and long-term benefit for the people served. *Everyone is on the same page.*
Gather the Pieces **2** *CONFIDENT*	**Smart Surveys** Tracking achievements, plus smart surveys, are efficient data collection. Partners can be responsive to clients and track progress toward goals. *Clients co-define success.*	**Painless Data Analysis** Understand data with only a handful of Excel formulas and two graphs. A Learning from Impact Team is a collaborative process for turning data into powerful action. *Co-learning and actionable knowledge.*
Tell Your Story **3** *COMPELLING*	**Masterful DataViz** Engaging data visualizations, graphics, and dashboards are essential for communicating impact. *Data people easily understand.*	**Powerful Impact Stories** Pulling it all together: marrying client narratives and meaningful impact invites connection and builds credibility. *Stories that move people to action.*

When the Strategy is fully in place, social sector leaders are unstuck because they have the following:

The solid framework creates **clarity around what it takes to fulfill a mission** and **why immediate benefit is expected to result in long-term success**. This helps manage mission-drift and focus resources. This is the basis of a **strong case for sustaining investments** because it's clear what long-term change clients will have the ability to make.

The ImpactStory™ Strategy
www.impactstorycoaching.com
Isn't it time you had your impact story at your fingertips?
Click to play video.

Confidently collecting defined metrics of success gives social sector partners the ability to talk about real and immediate **returns on investment**, to understand where additional resources are needed, and predict how new investments may increase impact.

Meaningful impact data **builds trust** with the communities served, as well as between partners and other stakeholders. The process of identifying insights and co-learning is a **process for leveling power**, as well as for having productive conversations about program improvement and growth.

When staff have access to data, they become more **motivated to set and reach goals**. Data helps program supervisors and grants managers ask important questions and provide the right support.

The Strategy results in valid, meaningful knowledge to **guide decision-making**. Unmet goals become priorities for growth, including potential realignment of resources. **Social sector opportunities are unlocked**.

WHAT IT TAKES

Like establishing an accounting system, the strategy does take some time and effort to set up, and the tools are tailored to the specific immediate impact sought. However, even the process of setting up the Strategy is valuable because it builds buy-in, helps promote a learning environment, and engages curiosity and creativity.

Once the Strategy's structures are in place, and in as little as about five hours a week, **impact tracking, data-driven decision-making, and powerful storytelling evolve as part of the fabric of the organization.**

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

The **ImpactStory™ Strategy Toolkit** is the focus of the live, on-line [ImpactStory™ Academy](). The 9-week Academy orients **social sector leaders** to all parts of the Strategy, gives them an opportunity to start building their systems, and includes all the tools, resources, and examples needed for putting it fully into place.

Academy participants also become members of a community of like-minded peers for ongoing support and resource exchange.

The price is **$1,497 per organization** (*not* per person) – attend by yourself or bring the whole team!

Who Should Attend

The ImpactStory™ Academy is designed for leader(s) who have the ability to put the systems and processes in place. These leaders might include:

> *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, Nonprofit Assistant Director of Operations*

> *This is a master class. This is really, really dynamite information! Thank you!*
>
> *- Elizabeth, Nonprofit Advocacy Director*

Nonprofit Service Providers	Funders
➢ Executive Director	➢ Foundation President
➢ Development Director	➢ Director of Community Engagement and Impact
➢ Marketing Director	➢ Portfolio Manager
➢ Program Supervisor	➢ Grants Manager
➢ Director of Community Engagement	➢ Marketing Director
➢ Data Manager or Internal Evaluator	➢ Data Manager or Internal Evaluator

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

➢ Full buy-in from the Board of Directors and Executive Director/CEO.

➢ An organization which is invested in being a learning organization.[2, 3]

➢ A desire for authentic, trust-based funder-grantee relationships with the goal of working together – and with the communities served – towards systems change.

➢ A commitment to using data to improve programs, support staff, and tell powerful impact stories.

➢ The ability to come to every class and do homework between classes (less than 3 hours per week).

➢ Comfort with basic Excel skills and not (very) afraid of numbers.

➢ Curiosity and a growth-oriented perspective.

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[2] https://www.penguinrandomhouse.com/books/163984/the-fifth-discipline-by-peter-m-senge/
[3] https://www.geofunders.org/resources/what-is-a-learning-organization-674

What Participants Walk Away With

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

The Academy includes:

✓ Nine 90-minute classes, plus 30 minutes after each class for questions, working on putting what you've learned into action, and networking. You get a total of 18 hours of live learning.

✓ A comprehensive workbook and toolbox including all the resources, tips, and examples needed to bring the Strategy to life.

✓ If you choose, you can complete a Strategic Impact Map™ (aka Solid Framework) for a your organization or portfolio. Nonprofit participants can also choose to create a Smart Survey.

✓ Ongoing 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 ongoing access to the Funders or Nonprofit ImpactStory™ Network, an invitation-only peer network, for asking questions, building relationships, and sharing information. I also hold a monthly, 90-minute discussion group for asking questions and working on the steps of the Strategy.

✓ Confidence, motivation, and support in putting the ImpactStory™ Strategy to work at your organization.
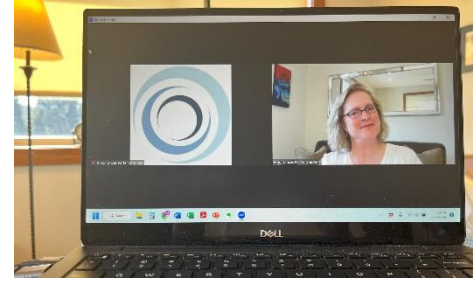
I just want to express that the clarity and soundness of reasoning that your map and documents brought to our work has been TRANSFORMATIONAL as in it has literally reframed some of the work that development is doing. We are no longer being treated as unhelpful antagonists by development, and in large 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

Orientation – ImpactStory™ Strategy

Class 1 - Welcome and Goal Setting

An introduction to each other, the ImpactStory™ Strategy, and the Academy structure.

Lesson	Introduction to the ImpactStory™ Strategy, the benefits for funders and nonprofits, and the Academy structure.
Interactive Discussion	What are you hoping to get out of the Academy?
Take Aways	The Academy will give you all the information and resources needed to put the Strategy into place at your organization.
Homework	None – woohoo!
Resources	Access to the class-restricted Google folder where you can find all the recordings and resources.

STEP 1 – Map Out Your Strategy

Class 2 - Strong Frameworks
Strategic Impact Map™ Part 1

Lesson	What a Strategic Impact Map™ is and how it can help you as a nonprofit or funder. Introduction to a case study.
Interactive Discussion	Complete and discuss workbook pages on community-needs, vision for systems change, and mission.
Take Aways	How to connect community-level need, vision for systems change, and mission as a framework for why your programming (nonprofits) or funding strategy (funders) is making progress toward systems change.
Homework	Use your workbook to make a list of all your organization's programs/strategies (nonprofits) or funding priorities/grants made for at least one portfolio (funders).
Resources	(1) Strategic Impact Map™ Guide (ImpactStory™ exclusive). (2) Word templates for Strategic Impact Maps™ (ImpactStory™ exclusive). (3) Samples from previous Academy participants.

Class 3 - Programming that Works
Strategic Impact Map™ Part 2

Lesson	Impact Statements allow you to state how the solutions (i.e., groups of programs and strategies) are likely to result in longer-term change for people served, and how that longer-term change is progress toward your vision of systems change. Learn about the power of evidence-based programs and how nonprofits can responsibly adapt them to fit the specific needs of the community served.
Interactive Discussion	Workshop writing mission-driven solutions in your Strategic Impact Map.
Take Aways	Connecting your mission-driven solutions to specific impact is key to being clear about the immediate impact, longer-term change, and vision for systems change you are working towards.
Homework	Use your workbook to complete your mission-driven solutions.
Resources	(1) Free access to previously created Impact Statements for Affordable Housing, Early Learning, Workforce Development, and Out-of-School Time (ImpactStory™ exclusives). (2) Video on adapting evidence-based programs.

Class 4 – Articulating Your Impact
Strategic Impact Map™ Part 3

Lesson	How to articulate immediate-impact and longer-term change. Review resources of lists of impacts for the social sector.
Interactive Discussion	Start writing out your immediate and longer-term impacts for each of your mission-driven solutions.
Take Aways	Now you've connected your mission-driven solutions to programming and impact; you're ready to create surveys (nonprofits) and ask for data (funders) that capture immediate impact.
Homework	Use your workbook to complete your mission-driven solutions.
Resources	Video of me working with a nonprofit to create their Strategic Impact Map and plan their Impact Statement.

STEP 2 – Gathering the Pieces

Class 5 - Smart Surveys
How and Why Surveys are Key

Lesson	Smart surveys collect key metrics of success and give social sector partners the data needed to understand the immediate impact nonprofit clients receive. They are also critical for equity and inclusion because collecting feedback gives clients an authentic voice in shaping their experience.
Interactive Discussion	Review the components of smart surveys, different ways of asking questions, and how nonprofits can avoid getting only positive feedback.
Take Aways	Smart surveys are the basis for collecting the data that allow partners to collaboratively understand impact and improve programming.
Homework	Use your immediate impact to start to write survey questions you would want from grantees.
Resources	(1) Smart Survey Template (ImpactStory™ exclusive), (2) Video on increasing response rates

Class 6 - Painless Data Analysis
No Statistics Required

Lesson	Neither nonprofits nor funders need anything more than a few Excel formulas, two graphs, and some basic data ethics to understand your data. The real power lays in the collaborative learning and action planning that happens in a Learning and Insight Team.
Interactive Discussion	Experience how Learning and Insight Teams are a valid and inclusive way turn data into action, and how nonprofits and funders can engage in collaborative learning that builds trust and opportunities for doing even more good.
Take Aways	Most organizations only need Excel for tracking impact and analyzing data. Learning and Insight Teams are the most powerful part of the whole ImpactStory™ Strategy process.
Homework	Nonprofits: Use sample raw data file to practice your new data analysis skills.
Resources	(1) Video explaining the different kinds of data organizations have. (2) Sample raw data file for nonprofits to practice Excel analysis skills. (3) Video of how to analyze open-ended data. (4) Sample graphs for practicing the Learning and Insight Team process. (5) Learning and Insight Team guide and agenda (ImpactStory™ exclusive).

Class 7 – Painless Data Analysis – NONPROFITS deeper dive into Excel
Still No Statistics Required

Interactive Discussion	We work through the Excel templates together.
Take Aways	How to create a data analysis template in Excel so your data analysis becomes plug and play.
Homework	Keep using the sample raw data file to practice your new skills.
Resources	Sample raw data file for practicing Excel analysis skills.

Class 7 – Painless Data Analysis – FUNDERS deeper dive into Learning for Impact Teams
Learning and Planning Together

Interactive Discussion	We experience a Learning and Impact Team meeting.
Take Aways	How to support a curious, learning culture while diving into program successes and challenges.
Homework	Practice building a learning culture at your organization.
Resources	(1) Sample graphs for practicing the Learning and Insight Team process. (2) Learning and Insight Team guide and agenda (ImpactStory™ exclusive).

STEP 3 – Tell Your Story

Class 8 - Masterful Data Viz
Data that Looks like a Million Bucks

Lesson	Learn the essential principals of masterful data visualization for inward-facing dashboards and graphs, as well as for outward-facing graphics and infographics.
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 clear data visualizations which – all by themselves – tell stories.
Homework	Look at your last outward facing report and identify three things you'd change.
Resources	(1) Data visualization resources from Depict Data Studio and others. (2) Samples from previous Academy participants.

Class 9 - Powerful Impact Stories
Impact Stories that Move People to Action

Lesson	Marrying data and narratives for deeper, more compelling impact stories. Nonprofits tell four kinds of data stories and funders tell three.
Interactive Discussion	Look at your list of goals from the first class: Did you get everything you needed? What's the most pressing demand for impact stories are your organization right now? What's the very next thing you're going to do to implement the Strategy?
Take Aways	How to tell an impact story in a way that moves people to action, as well as a plan for moving forward with the ImpactStory™ Strategy at your organization
Homework	Take your next step.
Resources	Invitation to continue to use the ImpactStory™ Network listserv to ask questions, exchange information, and build relationships.

Partnerships for Strategic Impact® seeks to use impact to promote democracy, social justice, equity, and activate the power of those who have been disenfranchised.

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