



The Insight Manager Program

V 8.1.24

THE NEED

The **social sector** is uniquely poised to address human needs which are not readily met by the private sector or the will of governments. Together, countless nonprofits and their funders provide a wide range of human services at the local level. These services are critical to addressing many societal and economic challenges impacting people from under-resourced or disenfranchised communities: **the social sector is critical to advancing social justice and building equitable societies.**

Nonprofits' trying to meet requirements from multiple funders often leads to programming fragmentation, **insufficient overhead**, and a **scarcity mindset**. **The social sector is stuck because this unbalance funder-nonprofit power dynamic can severely limit the success they are able to co-produce.**

Innovations in grant making practices and funding strategies that focus funders and nonprofits collaboratively on long-term success are meaningful ways to unstick the sector. Less obvious than the need to unstick the sector, is that just **finding a common definition of "success" is essential** to the success of all these innovations.

In 20+ years of working with social sector partners, I've never met a single person who does not *really, really* want there to be a single number – like "profit" – that **nonprofits can use as a simple, clear indicator of success**. Intuitively, we feel like the answer must lay in scientific methods, because we know using **evidence-based programming** is desirable and in science **success is defined by statistically significant findings of (ideally long-term) benefits**.

Here's the problem with that: Social sector work isn't *just* hard, and it doesn't *just* have a lot of moving pieces. The work is happening in the context of a **constant flow of unpredictable factors that influence the strategy, timeline, and ultimate impact**. The scientific methods for formal program evaluation involve very specific rules for rigorous experimental design, objectivity, and statistical testing. **Even very simple scientific methods are extremely hard put into place within the complexity of day-to-day service delivery.**

Nevertheless, and despite how hard can be, the value of **gathering impact** and **using client feedback** isn't disputed. Most nonprofits and funders *want* to collect and use data. Unfortunately, the majority, **82% of respondents in one sector survey**, found it too resource intensive, expensive, and/or complicated. We simply don't have an elegant solution social sector partners can use to collaboratively and practically track impact, gain insights for improving programs, and clearly communicate links between individual success and progress toward systems change. **This shouldn't be a struggle.**



Small, mighty, and on-the-ground every day, **local nonprofits** fill service gaps, provide hope, and help build equitable communities. But limited evaluation resources mean **they consistently miss out not only on having impact data to communicate their success to funders and other stakeholders, but also to improve programming and support their staff.**

Foundations are increasingly wanting to level power and eliminate the scarcity mindset through trust-based philanthropy and innovative funding strategies. But they also **need to know when partnerships are successful and how their investments are making meaningful progress toward systems change.**

Typically, sector capacity builders (such as United Ways, Candid, the Nonprofit Hub, Centers for Effective Philanthropy, and Grantmakers for Effective Organizations) are the go-to support for ensuring strong nonprofits and effective nonprofit-funder relationships. However, their programming primarily focuses on leadership development, staff and volunteer capacity, networking, and organizational growth and vitality. **Little, if any, programming is focused on tracking and using impact.**

Experience tells me all this is because “program evaluation” is all too often considered a sophisticated consulting service provided by an expert, external evaluator. It’s also all too often experienced as **disruptive, sprawling, abiguous, too expensive, and unsustainable.**

A WAY FORWARD

A vision has emerged to adequately resource nonprofits so they can be responsive to communities’ changing needs, as well as to generate authentic partnerships between nonprofits and funders, focused on generating meaningful systems change. This audacious goal requires a straightforward and uncomplicated way for local nonprofits and their funders to collaboratively track and use impact.

THE IMPACTSTORY™ STRATEGY

Not the practice of program evaluation science, but emerging from it, the [ImpactStory™ Strategy](#) provides a framework and toolkit, clearly defined metrics of success, and intuitive language which allows nonprofits and their funders: to be **CLEAR** about the specific impact 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.

The data need to work for the staff, not the other way around. How do we collect data that helps them do their job at the same time we’re collecting data we need for grants?

– Mary, Executive Director

How can we capture the ultimate impact of our priority portfolios? How do we talk about the impact we are making? Can we even claim to be making a community impact?

– Scott, community foundation Chief Community Impact Officer

We just don’t have the in-house expertise to help nonprofits with program evaluation. We have a directory of consultants we point people to.

– Cindy, Capacity Builder Deputy Director for Partnerships, Consulting, and Impact



The uncomplicated, three-steps of the innovative [ImpactStory™ Strategy](#) includes all the templates, tools, and resources needed to create and sustain impact tracking and storytelling processes that lead to informed action. The Strategy ensures social sector partners *always* have quality metrics to reflect on, structures in place for turning data into powerful action, and **their impact stories at their fingertips**.



THE INSIGHT MANAGER PROGRAM

Unfortunately, because they are stretched so thin, even with all the knowledge, structure, and tools in hand, many nonprofits and funders simply do not have the staff capacity or time to collect and use impact data. The **Insight Manager** provides **just the right amount of ongoing, internal staff capacity** for embedding the ImpactStory™ Strategy within a nonprofit, a foundation, or in their relationship.

The Insight Manager supports a thriving, strengths-based, growth-oriented, and actionable data-culture for both **nonprofits** and **funders** by:

- ✓ building uncomplicated, sustainable structures needed to ensure high-quality metrics are always available, and
- ✓ providing on-going support of high-quality data collection, expert guidance in capturing insights for turning data into action, and capacity for contextualizing data and weaving in client narratives for powerful storytelling.

When uncomplicated, sustainable, and right-sized strategies are in place for defining, tracking, and using impact, social sector partners have access to powerful knowledge that can dramatically increase the vitality, agility, and visionary impact of the whole sector.

HOW THE INSIGHT MANAGER PROGRAM WORKS

Up to eight nonprofits and/or funders work with a single Insight Manager, who is embedded and manages the ImpactStory™ Strategy at their organization. Nonprofits or funders use the Insight Manager to collect impact data and facilitate storytelling for their organization, and/or a funder can offer the Insight Manager as a capacity-building service to grantees.



Here's how it works:

- (1) **Insight Managers** provide embedded, internal data capacity to nonprofits and funders ongoing data management and analysis support for 12 months at a time, paid quarterly. Insight Managers **become part of an organization's team** and partner with staff to **build out and run the ImpactStory™ Strategy** so the organization's impact story is always at your fingertips.

Insight Managers facilitate building a **Strategic Impact Map** and support a **healthy data culture**.

They conduct an initial **data inventory**, create or update **data collection strategies** using Excel (including surveys), and **train and support staff** in ongoing data entry.

Insight Managers do all the **data analyses** and facilitate staff **meetings to understand the data** one to four times a year, as needed.

They also provide **impact dashboards for Boards**, **data graphics** ready to be incorporated into marketing materials and annual reports, coaching in telling impact stories for the executive director, development, and marketing staff, and support in **marry data with client narratives** for grants or donor requests.

The **organization retains physical ownership** of all the processes, tools, templates, and data generated by the Insight Manager if they leave the program.

- (2) **Partnerships for Strategic Impact®** provides the ImpactStory™ Strategy, as well as **all training, infrastructure, supervision, and technology** used by the Insight Manager.

Partnerships for Strategic Impact® conducts an initial **Readiness, Strengths, and Needs Assessment (RSN)** and provides an Assessment Report, **12-month workplan**, and **capped quarterly costs** for any organization enrolling in the program.

Partnerships for Strategic Impact® provides **quarterly and annual Insight Manager Progress Reports** (including workplan progress and satisfaction) to each organization.

Partnerships for Strategic Impact® **provides Insight Supervisors for all Insight Managers**. Insight Supervisors will check in with organizations regularly.

To build community and engage partners in ongoing learning, **all participating organization are part of the ImpactStory™ Network**, a private email listserv, which facilitates continual learning and resource sharing. As the network of partners grows, Partnerships for Strategic Impact® plans to host virtual and in-person retreats and conferences to build community and encourage innovation.

- (3) **Participating nonprofits and funders** will **include the Insight Manager as part of their team**, create time and space for tracking and learning from data, and provide quarterly feedback to Partnerships for Strategic Impact® to facilitate improvement and growth of the program.



- (4) **Funders** providing the Insight Manager as a **service to grantees** provide sustaining financial support for one or more nonprofits using the program and provide quarterly feedback Partnerships for Strategic Impact® to facilitate improvement and growth of the program.
- (5) **Capacity building membership organizations**, for nonprofits or funders, can offer the Insight Manager program as a **benefit to members**. They provide sustaining financial support for one or more organizations using the program and provide quarterly feedback to Partnerships for Strategic Impact® to facilitate improvement and growth of the program.

WHAT IT COSTS

These costs are preliminary and may change in the first couple of years of the Program as the true cost is borne out.

The cost is **\$6,500 per quarter** for a smaller organization (e.g., with three or fewer programs, fewer than five staff, and/or serving 250 or fewer clients per year) for organizations starting in 2024. This includes up to 250 hours per year of direct service, plus all the ImpactStory™ resources, and the community of support. Contracts are annual, paid quarterly in advance, and there is a 3% COL increase each year.

HOW IT HELPS

Participating nonprofits or funders will have **sustainable data capacity** so leadership can monitor impact, use the data to make program improvements, support staff excellence and supervision, keep the Board informed and engaged, and have ready access to the data and graphics needed to tell powerful impact stories for fundraising and building strategic partnerships.

Funders sponsoring Insight Managers will have **ready access to clear and meaningful data that supports authentic, trust-based partnerships** with grantees, including the ability to collaboratively meet to co-generate knowledge that supports evolving programming as clients' needs change, scaling, understanding contributions to systems change, and articulating the return on investments of funding portfolios. Funders may choose to have an Insight Manager **to facilitate a community of practice**; the Insight Manager could **provide trainings, host meetings, etc. to building understanding, buy-in, and support similar practices** across a community.

Capacity building membership organizations are able to **offer members an additional valuable capacity building service** often missing from the portfolio of governance and leadership programming. Capacity builders can alternatively use an Insight Manager to support their own data tracking and storytelling, or to **facilitate a community of practice**. An Insight Manager can **provide trainings, host meetings, etc. to building understanding, buy-in, and support similar practices** across a community.



ORGANIZATIONAL READINESS

Any organization wishing to join the program will be assessed by Partnerships for Strategic Impact®. This includes a 1- to 2-hour readiness interview. Readiness, strengths, and needs will be assessed, and the report will include a quarterly workplan, as well as a capped quote for the annual cost of the Insight Manager program.

All participating organizations are strongly encouraged to also enroll in the ImpactStory™ Academy, which is typically offered twice a year.

Nonprofit readiness includes:

- ✓ Complete support and buy-in from the Executive Director/President and the Board of Directors for dedicating time and effort for data collection, as well as understanding and using results.
- ✓ Staff and supervisors who are ready and have the capacity to consistently collect data during service provision.
- ✓ The ability to identify staff (and Board members if desired) for the Impact and Learning Team. The Team meets one to four times per year for 2 hours each meeting; this is the process for turning data into knowledge and action.
- ✓ One hour per month for the Executive Director to meet individually with the Insight Manager to review progress, documents, and the work plan.
- ✓ The ability for the Insight Manager to participate in monthly staff meetings.
- ✓ The ability for the Insight Manager to participate in staff and board retreats.
- ✓ A clear articulation of programming, including a reasonable expectation of stability of programming and practice.
- ✓ Some sort of database to capture productivity and impact data (Excel, GoogleSheets, or a packaged database). If a packaged database (such as Apricot 360, Salesforce, etc.,) is desired, needed, and not already in place, Partnerships for Strategic Impact® can provide referrals to people able build it. Building a database using a packaged database application (such as Apricot 360, Salesforce, etc.) is not part of what Insight Managers do.

PROGRAM DELIVERABLES

- ✓ Quarterly **work plans**.
- ✓ Quarterly **progress and satisfaction reports** with the Insight Manager.
- ✓ **Troubleshooting data collection and data entry** with nonprofit staff, as well as adjusting data collect tools as needed.
- ✓ **Productivity dashboards** provided monthly, bi-annually, or quarterly to the Executive Director and Board of Directors.
- ✓ **Coaching for the Executive Director** in presenting data and telling impact stories to the Board of Directors and other stakeholders.
- ✓ **Bi-annual or quarterly productivity and impact data analyses**; producing graphs and documents for the Learning and Insight Team meetings.



- ✓ **Facilitating a healthy data culture** via meetings with the Executive Director (monthly), staff meetings (monthly), staff and board retreats (annually), and Learning and Insight Team meetings (one to four times per year).
- ✓ An **Annual Director’s Data Report** (including Learning and Insight Team meeting summaries and action plans, as well as Board dashboards)
- ✓ Providing **impact data and graphics for the Annual Report**.
- ✓ Creating **data visualizations** for other reports and grant applications.
- ✓ If a funder is providing an Insight Manager to a grantee: **Two, 2-hour meetings between each nonprofit and their funding partner** to review the data, identify insights, and co-develop knowledge that can guide decisions about evolving programming as clients’ needs change, scaling, understanding contributions to systems change.
- ✓ The **Insight Supervisor will check in quarterly with the Executive Director** (or designee) of the nonprofit to touch base about satisfaction with the Insight Manager.
- ✓ Free membership in the ImpactStory™ Network for sharing resources.

INSIGHT MANAGER JOB DESCRIPTION

The Insight Manager will likely experience ebbs and flows in their work, with some weeks requiring no work, and some weeks requiring many hours of work. This is a fully remote position, but regional hires are encouraged to ensure familiarity with local conditions and culture. The Insight Manager will be provided with a laptop, but not internet service or a cell phone. The Insight Manager’s duties include, but are not limited to, the following:

Duties directly with Partnerships for Strategic Impact®

- ✓ 1 hour a week of group supervision with an Insight Supervisor.
- ✓ Quarterly workplans and deliverables provided to the participating organizations (i.e., nonprofits, funders, and capacity builders)
- ✓ Quarterly data collection from participating about productivity, impact, and satisfaction related to the program.
- ✓ Quarterly reports of work plan progress with each participating organization, as well as their satisfaction with the process and progress.
- ✓ Quarterly, half-day virtual retreats with Partnerships for Strategic Impact®.
- ✓ Annual, 3-day, in-person retreat with Partnerships for Strategic Impact® (not being done at this time).
- ✓ Hourly tracking of work.

Duties directly with Organizations

- ✓ 1 hour per month per organization in staff meetings; this allows the Insight Manager to both stay abreast of what’s going on in the organizations and facilitate a healthy data culture.
- ✓ Troubleshoot data entry with staff as needed.
- ✓ Troubleshoot administration of data collection tools with staff as needed.
- ✓ Adjust data collection tools as organizational needs change.



- ✓ If a packaged database is used, download data from the database into Excel for analysis.
- ✓ Create accurate, monthly productivity dashboards for each Executive Director/Board of Directors.
- ✓ Provide coaching to the Executive Directors in presenting data to the Board of Directors or other stakeholders.
- ✓ Conduct organizational impact data analyses one to four times per year (including cleaning and sorting data, counts, percentages, strategic comparisons between groups of clients).
- ✓ One to four times per year transfer all quarterly analysis graphs (including a short description of each graph) into an analysis summary document for each organization's Learning and Insight Team.
- ✓ Facilitate one to four Insight and Learning Team meetings per year for each organization, including producing summaries of the meeting (which will include the analysis summary document, insights and knowledge generated, and action plans).
- ✓ Partner with each Executive Director to identify the data to include in the Annual Report. The Insight Manager does not create the Annual Report, but does help the Executive Director work through which stories to tell and provide the needed data/graphics.
- ✓ Create appropriate data visualizations for internal reports and grant applications.
- ✓ Create appropriate data visualizations, as needed, for social media, website, etc.
- ✓ Attend annual staff and board retreats.

Duties directly with Funders Sponsoring Grantees in the Program

- ✓ Facilitate up to two, 2-hour meetings per year between each nonprofit and the point person(s) with the funding partner to review data, identify insights, and co-develop knowledge that can guide decisions about evolving programming as clients' needs change, scaling, and understanding contributions to systems change.

Qualifications and Strengths of the Insight Manager

Insight Managers will ideally be people who have been in a middle management position (including supervising at least one staff person) at a human services nonprofit (annual operating budget under \$3M) or community foundation. Ideally, the Insight Managers will be familiar with the strengths, challenges, and culture of the region(s) the organization served. Preference will be given to applicants with a bachelor's degree and at least three years of experience, or a high school graduate with at least six years of experience. Recruitment will include specific strategies for reaching people identifying with historically marginalized communities.

Insight Managers are expected to:

- ✓ be able to manage multiple projects at the same time
- ✓ be a value-driven individual
- ✓ have a passion for data and impact measurement
- ✓ be eager to learn and grow professionally
- ✓ be highly attentive to detail and extremely well organized
- ✓ have an inclusive team-oriented approach
- ✓ have a growth-mindset
- ✓ be strengths-based



- ✓ be able to provide a gracious, generous, and connected customer experience
- ✓ have full command of English
- ✓ be very proficient in Excel and GoogleSheets
- ✓ be very proficient in Canva
- ✓ be able to make effective visual design choices
- ✓ to be confident in learning new software applications
- ✓ to be able to design, track, and stick to work plans while juggling multiple priorities
- ✓ have strong interpersonal and communication skills
- ✓ be able to work productively to achieve effective solutions and to proactively navigate conflict

LEARN MORE ABOUT THE IMPACTSTORY™ STRATEGY

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.**



Click to read.

Map Out Your Strategy

CLEAR

1

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

[Simply cite](#) why your programs are expected to result in short- and long-term benefit for the people served.

Everyone is on the same page.

Gather the Pieces

CONFIDENT

2

Simple Data Collection

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 and Insight Team](#) is a collaborative process for turning data into powerful action.

Co-learning and actionable knowledge.

Tell Your Story

COMPELLING

3

Masterful Data Visualization

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.

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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