



UpMetrics Impact Framework Workshop

Your Organization Name:

Vision:

Mission:

Values:

Impact Theme(s):



Impact Dimensions

Who:

- **Objective 1:**
 - **KII:**
 - **KII:**
- **Objective 2:**
 - **KII:**
 - **KII:**
- **Objective 3:**
 - **KII:**
 - **KII:**

What:

- **Objective 1:**
 - **KII:**
 - **KII:**
- **Objective 2:**
 - **KII:**
 - **KII:**
- **Objective 3:**
 - **KII:**
 - **KII:**



Quality:

- **Objective 1:**

- **KII:**
- **KII:**

- **Objective 2:**

- **KII:**
- **KII:**

- **Objective 3:**

- **KII:**
- **KII:**

Better Off:

- **Objective 1:**

- **KII:**
- **KII:**

- **Objective 2:**

- **KII:**
- **KII:**

- **Objective 3:**

- **KII:**
- **KII:**



Community Contribution:

- **Objective 1:**

- **KII:**

- **KII:**

- **Objective 2:**

- **KII:**

- **KII:**

- **Objective 3:**

- **KII:**

- **KII:**

Notes:



Glossary of Impact Terms

Community Contribution. The collective effort of various actors and interventions in achieving an outcome. Multiple organizations, initiatives, or circumstances can contribute to the same impact, making it challenging to attribute success to a single source. Impact contribution emphasizes collaboration, synergy, and the interconnectedness of efforts within a broader context.

- Direct contribution: An extension of your “better off” KIs, with a community lens.
- Indirect contribution: Your defined target community should take geography and demographics into consideration especially if the community is “people-focused” rather than “planet-focused”.

DeCAL. Our proven impact measurement and management methodology, known as **DeCAL**, provides a strategic step-by-step process for evaluating and communicating the effectiveness of your programs, initiatives and investments.

- Define - Establish your Impact Framework to define and operationalize how you measure and communicate performance and community contribution across your primary impact themes.
- Collect - Collect, consolidate, and manage all relevant data in one centralized location.
- Analyze - Understand impact outcomes and track ongoing progress towards goals and against industry benchmarks
- Leverage - Use data to drive effective decision-making, simplify reporting, demonstrate outcomes across key performance metrics, and more effectively tell your story of impact.



Dimensions of Impact. Structural concepts used to help organize your impact framework. By focusing on who you serve, what you deliver, what the quality of your delivery is, and if those you serve are better off, you will be able to effectively measure, manage, and communicate your impact.

- Who: (are we serving): e.g Demographics / characteristics, # of recipients
- What: (are we delivering and how much): e.g Product, services, capital
- Quality: (of our delivery): e.g NPS, utilization, retention
- Better off: How are those who we are serving better off
- Community Contribution: Community collaboration, synergy, and the interconnectedness of efforts within a broader context.

Impact Framework. A structured approach that helps mission-driven organizations define and operationalize their impact - allowing teams to identify, measure, and communicate their social or environmental impact. It is a framework that contains your vision, mission, and values along with a collection of themes that each have objectives and KIs that reference both your direct and in-direct impact.

- Theory of Change (TOC)
- Social Return on Investment (SROI)
- Impact Management Project (IMP)
- Results Based Accountability (RBA)
- IRIS +

Impact Measurement and Management (IMM). A systematic and structured approach used by organizations to assess, track, and optimize the social, environmental, and economic outcomes or impacts of their activities, projects, programs, or investments. IMM encompasses a set of processes, methodologies, and tools aimed at understanding and improving an organization's ability to create positive impacts and minimize negative ones.



Impact Theme(s). Impact Themes help describe a purpose-driven approach to contributing to social or environmental issues.

Key Impact Indicators (KII). Metrics used to assess the impact of an organization's activities on its stakeholders. These indicators, which can be quantitative or qualitative, provide information about the value of an organization's activities in terms of their contribution to specific social or environmental objectives.

Mission. A statement that supports your vision and serves to communicate purpose and direction. A mission statement should showcase how you plan to tackle and accomplish your current goals and can evolve over time.

Values. Organization's values communicate who you are as an organization and how you operate and communicate on a day to day basis. Your values should be grounding, easy to follow, and something that every member of your organization wants to embrace and live by.

Vision. A statement that communicates the core purpose of your organization and the change you want to make in your community. It should be long-term, un-varying, and powerful.

BONUS: Early access to UpMetrics' Impact Framework Builder

UpMetrics' free Impact Framework building tool is launching Spring 2024

Scan the QR code and sign up via the form to be one of the first to receive access when we launch!

