Fundraising Essentials Workbook: Impact Assessment

Understanding Impact Assessment

Impact assessment acts as a compass, helping your organization stay oriented as you move through your mission-driven work. It gives you a way to pause, look at where you are, and make thoughtful decisions about your programs and the change you hope to create.

At its heart, impact assessment helps you answer three simple but essential questions:

- *Who are we serving?*
- *What is changing because of our work?*
- *How do we know?*

There is no single right way to measure impact. This workbook is meant to meet you where you are, help you identify what matters most right now, and create a starting point you can build on as your organization grows.

As you go through this workbook, keep one guiding question in mind:
Which three data points best tell your story this year?

Organization Name: _____

Step 1: Organizational Purpose & Approach

Let's start by discussing your organization's mission, purpose, and how your programs address the needs of those you serve.

MISSION

- What is your organization's mission?

Example - Mission: To empower women entrepreneurs in Long Beach to grow sustainable businesses and strengthen the local business community.

WHOM

- Whom do your organization and specific programs serve?

Example: Our organization and programs serve women entrepreneurs at all stages of their business who live or work in Long Beach, California.

WHAT & HOW?

- What needs or issues do your programs address for the people or groups you serve and how do the address those needs?

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Step 2: Build a Framework

OBJECTIVES

- What are the key objectives you want to measure?

Example - Objective: Host at least six Aurora Networking events annually where women entrepreneurs can connect with industry experts, potential partners, and investors.

OUTCOMES - QUANTITATIVE & QUALITATIVE

-What specific outcomes do you expect to achieve, and how will you measure or document them?

Include both measurable results and observable changes in participants or the community.

ESTABLISH BASELINES

- If you are already tracking data, what are your current numerical values or statuses for these objectives and outcomes?

Example - Baseline: Our Aurora Networking Program currently hosts two networking events per year.

TRACK PROGRESS

- How will you monitor and track progress, and what specific milestones will you set to gather data systematically for evaluation purposes?

Step 3: Implement Impact Assessment Plan

You are now ready to collect data, review your results, and use what you learn to inform program decisions and improve effectiveness.

DATA COLLECTION

- Based on your objectives and desired outcomes previously outlined, what are your new data points and the other relevant information you gathered?

Example - Data collection: During the first two quarters of this year, the Aurora Networking Program hosted four networking events.

ANALYZE DATA & INTERPRET RESULTS

- When comparing your current data to previous results:
  - What differences or trends do you notice?
  - What do those differences tell you about program effectiveness?

Remember to consider context when interpreting changes. Growth in one area may temporarily reduce numbers in another, or changes to program eligibility may affect totals.

Step 4: Learn & Report

Finally, let's look at how you can use this information to improve your programs and share your impact results.

LEARN & DECIDE

Think about things like:
- What did we learn?
- What might we adjust?
- What surprised us?

REPORTING

- Some of what you've identified here may be useful to share with others. This can be done in a variety of ways, but for now choose a few key insights that best reflect your work and what you are learning.

Next Steps to Consider:

The following tools and resources can help you continue this work over time, using what you've already identified in this workbook.

Establish a Tracking Tool
Create a simple spreadsheet or dashboard to track key metrics consistently over time.

Develop a Story Collection Process
Set up a basic system for collecting quotes, testimonials, or short stories that help bring your impact data to life.
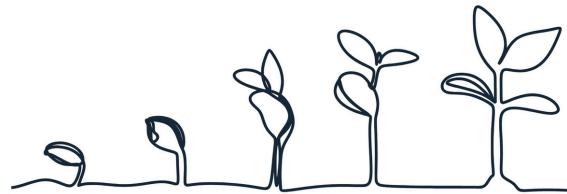
Revisit This Workbook Regularly
Use this workbook as a reference during quarterly or annual planning to track progress and document changes over time.

Additional templates and workbooks are available if you'd like support.

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