



Introduction to Impact Management

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Impact Management

Brought to you by Salesforce.org and
our special guest



A vibrant, stylized illustration of a forest. The scene is framed by large green trees at the top with yellow flowers hanging from their branches. The sky is a clear, light blue, with three small birds flying in the distance. The central focus is the text "Thank You" in a large, bold, dark blue font. Below the text, the forest continues with various types of trees, including tall evergreens, deciduous trees with orange and yellow foliage, and smaller trees with white blossoms. The overall style is flat and colorful, with a focus on natural elements.



Welcome!

Our goal for today is to share a bit about what Salesforce.org offers our customers to help them develop their impact management maturity and to hear from Plan International on their work building out their impact management capabilities.



Introductions



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Today's Agenda



**Core
Definitions**



**How
Salesforce.org
is approaching
Impact
Management**



**How Plan
International
is leading on
M&E**



Questions

Core Definitions

Our Core Why

There is something about the world as it exists today that we want to see **changed** or **preserved** for tomorrow.



What is Impact?

The change in the world because an organization exists

we exist

we don't exist



The Difference Between Outputs, Outcomes, and Impact?

Outputs and outcomes can be observed and counted, impact is estimated

How many people run the race?



OUTPUT

How many people finished the race?



OUTCOME

How many people finished the race that wouldn't have otherwise?



IMPACT

The Difference Between Outputs, Outcomes, and Impact?

Outputs and outcomes can be observed and counted, impact is estimated

Observed

Estimated

How many people run the race?

How many people finished the race?

How many people finished the race that wouldn't have otherwise?



OUTPUT



OUTCOME



IMPACT

Every INGO Should Be Able To Manage Their Impact

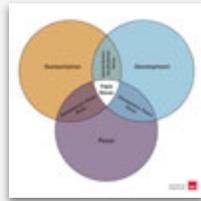
The Emerging Paradigm

Why Impact Management is More Important Than Ever



Ongoing Sectoral Reforms Focus on Impact

Long-term commitments support increased importance of impact management



80% Sector Funding From Gov.

| Organization | Annual Aid (ODA) |
|----------------|------------------|
| USAID (US) | \$31.08B USD |
| FCDO/DFID (UK) | \$18.7B |
| GiZ (GER) | \$17.78B |
| ECHO (EU) | \$13.85B |

“The strategy charts how USAID will change the way it does business -- including embracing digital technologies by default in certain instances -- in a manner that reflects best practice and is **evidence-based**.”

Impact Management Reform: Joining Forces Initiative

Building on success with the UNCRC; Advancing towards the SDGs



*“The policies, investments and practices we put in place in the next decade **must be transformational** for all children to break the intergenerational cycles of poverty, and exclusion and lay the foundations of the fair, prosperous and sustainable future that we have committed to deliver.*



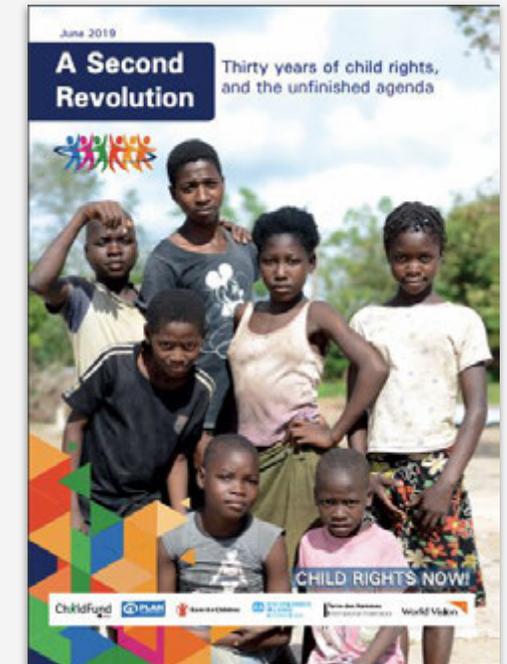
The consequences of inaction will be grave.” - A Second Revolution (2019)

Alliance of six leading child development NGOs:

(ChildFund Alliance, Plan International, Save the Children International, SOS Children's Villages International, Terre des Hommes International Federation, and World Vision International)

Impact management can realize key workstream elements of the Joining Forces Initiative:

- Invest today in the sustainable future of tomorrow
- Track and demonstrate progress for all children
- Listen and respond to children’s voices
- Make clear, concrete and ambitious commitments that will result in change for children in the next decade.



Impact Management

Continuously improving programs for greater impact.

What is Impact Management?

A set of practices and capabilities that support adapting programs we are offering today to improve tomorrow's impact by learning from what we've done in the past.

Our paper [*Achieving Agenda 2030*](#) defines impact management in context for INGOs focused on humanitarian and development missions.





Impact Management Capabilities

Identifying Impact Management maturity.



Continuous Evidence Building

Strategic Evidence Plan development & utilization

Logic Model development & utilization

Impact measurement practices

Use of analytics



Integrated Financial Management

Integrate outcomes & funding

Transparency of costs and impacts

Outcomes based financing



Participant Centered Program Management

Use of digital tools in program management

Field data collection practices in place

Constituent feedback tools & practices in place

Access to case-level information available to staff



All grounded in an ethical, responsible approach to evidence and data.

Inclusive of: security, privacy, power disparities, safeguarding, civil liberties and human rights.

The Impact Management Maturity Journey

Helping drive customer impact maturity and growth.





How Salesforce.org Measures Impact

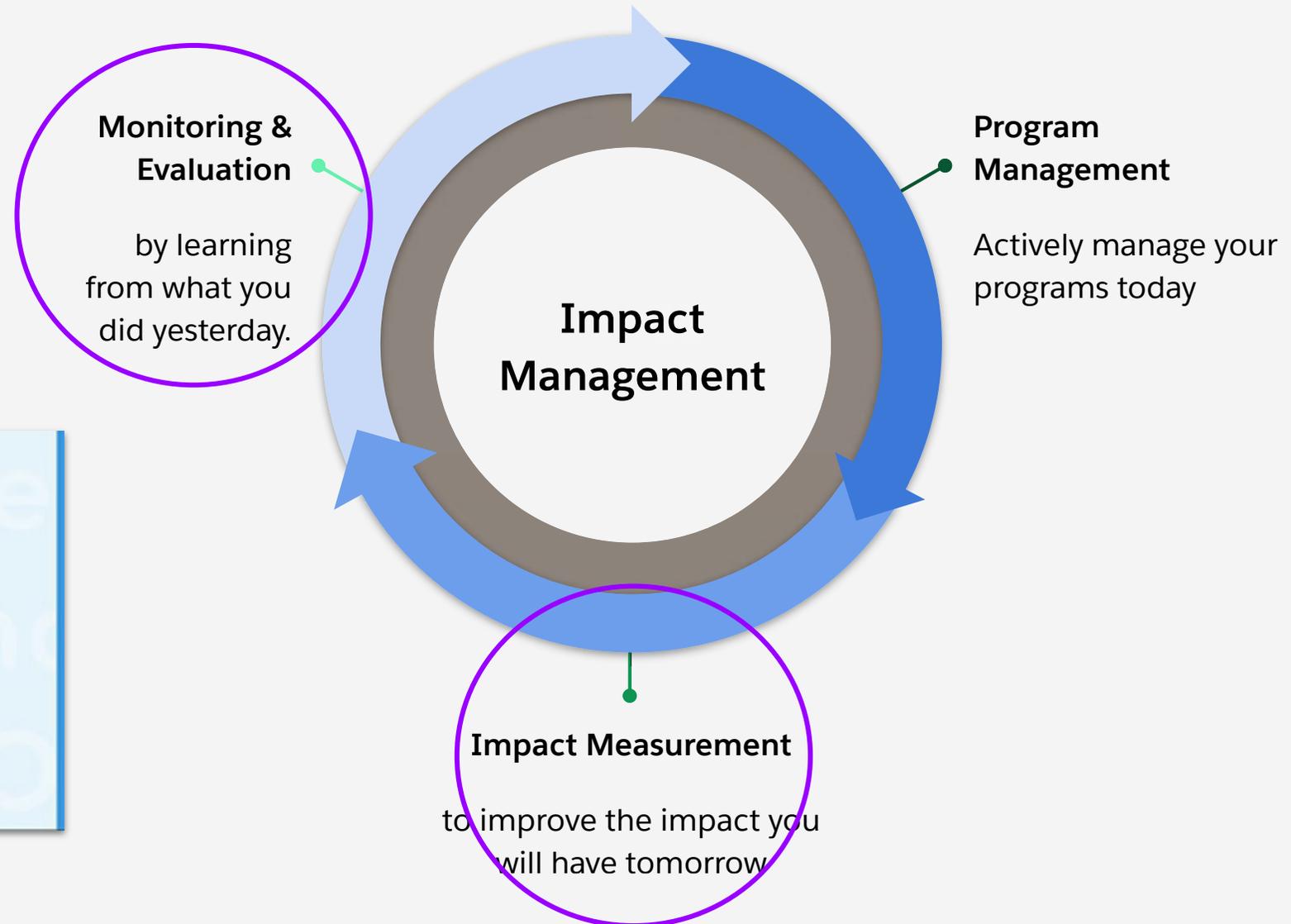
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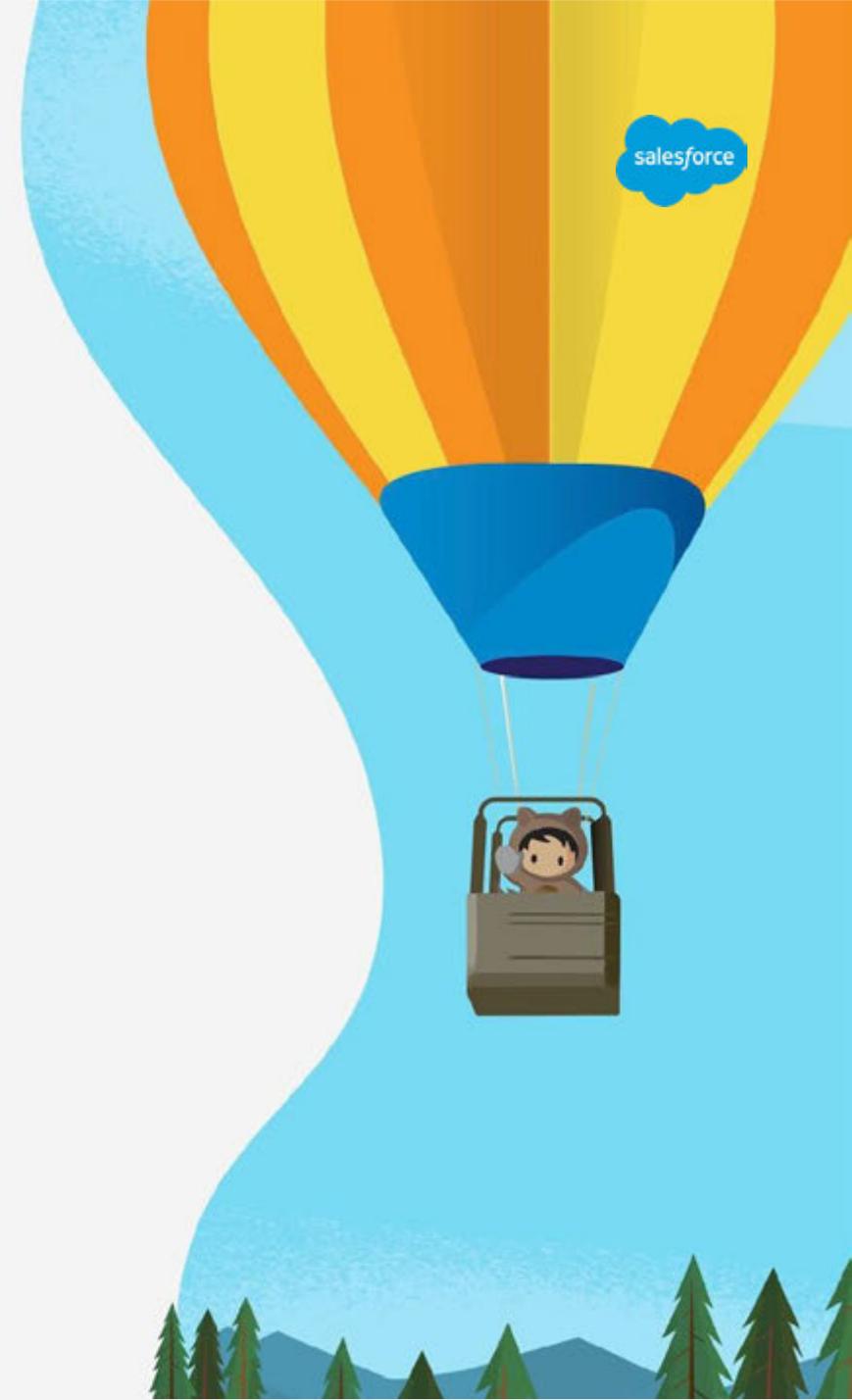


Why Have Effective M&E/Impact Measurement?

KNOWLEDGE IS POWER

- Strengthen what works
- Improve what needs to be improved
- Understand current impact
- Incorporate into strategy
- Increase future impact

But, merely having data will not lead to improved impact...



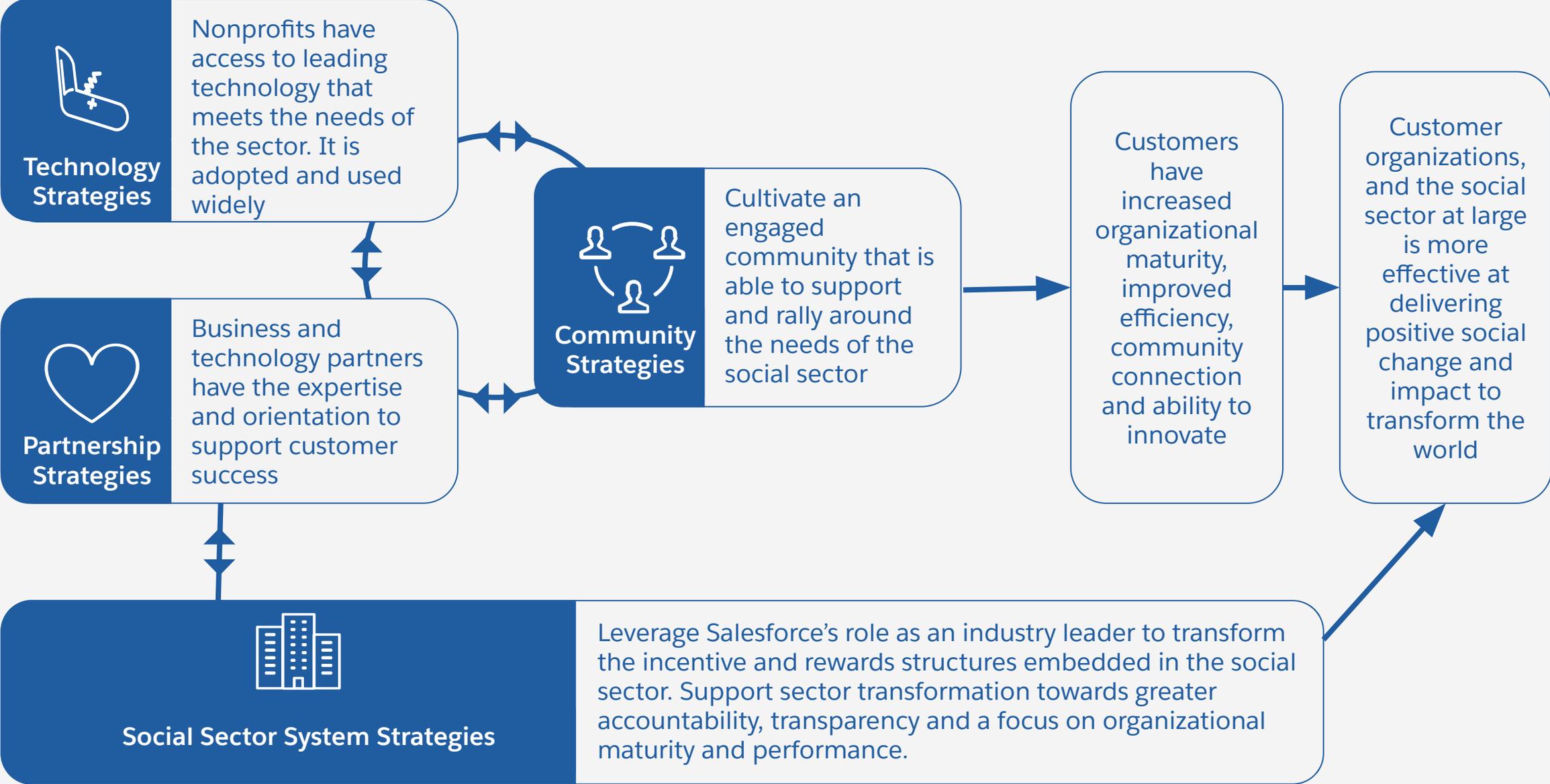
**There is a wide chasm between
useful and used.**

Barela, E. (too many times to count)



**Utilization via
Learning**

Salesforce.org Theory of Change



Salesforce.org Theory of Change

If we empower change makers with the tools and resources they need

Then they can transform how they achieve their missions

And the social sector will deliver unparalleled social change and impact

Together, we will create a more just, equitable, sustainable planet



Impact-makers and their organizations will be more efficient, collaborative, innovative and ultimately more effective in achieving their missions



Technology

Provide access to purpose built technology, and meet the tech needs of the social sector



Partnerships

Cultivate partnerships that can support implementation and adoption Salesforce and other technology



Community

Empower an engaged community that is able to support and rally around the needs of the social sector

PRINCIPAL

Logic Model/Impact Framework



Primary Measurement Tools

Customer Outcomes Survey

11. As a result of using Salesforce, has your org/institution/department...
 - a. Improved how work gets done (e.g business processes)
 - b. Improved its ability to achieve its mission
 - i. Yes
 - ii. No
 - iii. I don't know
 - iv. [Please explain your answer]
 - v.
12. How have the following changed as a result of using Salesforce?
 - a. Collaboration with outside organizations or institutions
 - b. Collaboration within your organization/institution, among staff and/or between departments
 - c. Communication with constituents, donors, students, alumni or other beneficiaries
 - i. Increased
 - ii. Somewhat Increased
 - iii. No Change
 - iv. Somewhat decreased
 - v. Decreased
 - vi. I don't know
 - vii. Not applicable
13. Has your organization/institution/department experienced any of the following benefits since adopting Salesforce? **RANDOMIZE ORDER - MULTI-SELECT**
 - a. Information is more centralized and easier to access
 - b. There is more consistency in how work gets done (processes & work flows)
 - c. Better able to set and monitor goals for individuals and organization over all

Customer Impact Interviews

1. What is your role in your organization? And What is your role as it relates to Salesforce?
End user, advocate, admin
2. What is Salesforce being used for and who is using it?
 - a. IF it hasn't come-up already: Is there a single centralized instance for the university/school/institution/organization, or many individual instances for programs/departments?
3. How does your organization/institution know that they are making progress on their mission? *(If respondent can't speak to institutional mission, ask about departmental goals)*
 - a. How does your organization assess your impact, or effectiveness?
 - b. Can you give me some examples of the main metrics you track over time? What are the most important data points you are looking at to measure the success of your work?



Products



Community Impact Report



Data Deep Dives

Centralized information and consistency in work are ways Salesforce helps improve customer efficiency



Impact Accountability Performance Matrix (APM)

Impact APM 2.0: Primary KPIs

| Healthy Growth: Financial Impact APM 1.0 KPIs | Healthy Growth: Non-Financial | | | | | | | |
|--|--|--|---|-------------------------------|--|-----------------------|-----------------------------|--------------|
| | Technology | | Partnerships | | Community | | | |
| | # of non-paying customers | True Login % | # of products released | # of Community Certifications | # of in-program partners | % of customers in HUB | % of HUB questions answered | # of Sprints |
| Social Impact: Social Value Impact APM 1.0 KPIs | Social Impact: Customer Outcomes | | | | | | | |
| | Effectiveness | Efficiency | Community Connection | | Innovation | | | |
| | Ability to Better Achieve Mission | Increase in SS Raised | Connection with beneficiaries/donors | | Able to evaluate programs and measure impact | | | |
| Business Value to .Com | | | | | | | | |
| | "Wor for Talent" (Recruiting, Retention, Talent Development) | "Reverse" Innovation (New Markets, New Customer Groups, Relationships) | Brand Contribution (Brand Strength / Quality, Loyalty, Trust) | | Risk Mitigation (Preempting Employee Activism, Corporate Sustainability/Longevity) | | | |

Utilization via Learning



Consistent Reporting



Internal Deep Dives



Trusted Advisors





Impact Management Capabilities

Salesforce.org's Impact Management maturity



Continuous Evidence Building

Theory of Change

Impact Framework

Impact data collection/analysis

Internal and external reporting



Integrated Financial Management

Impact APM



Participant Centered Program Management

Customer-focused quantitative and qualitative data tools

Facilitating utilization via learning

Use of Amp Impact



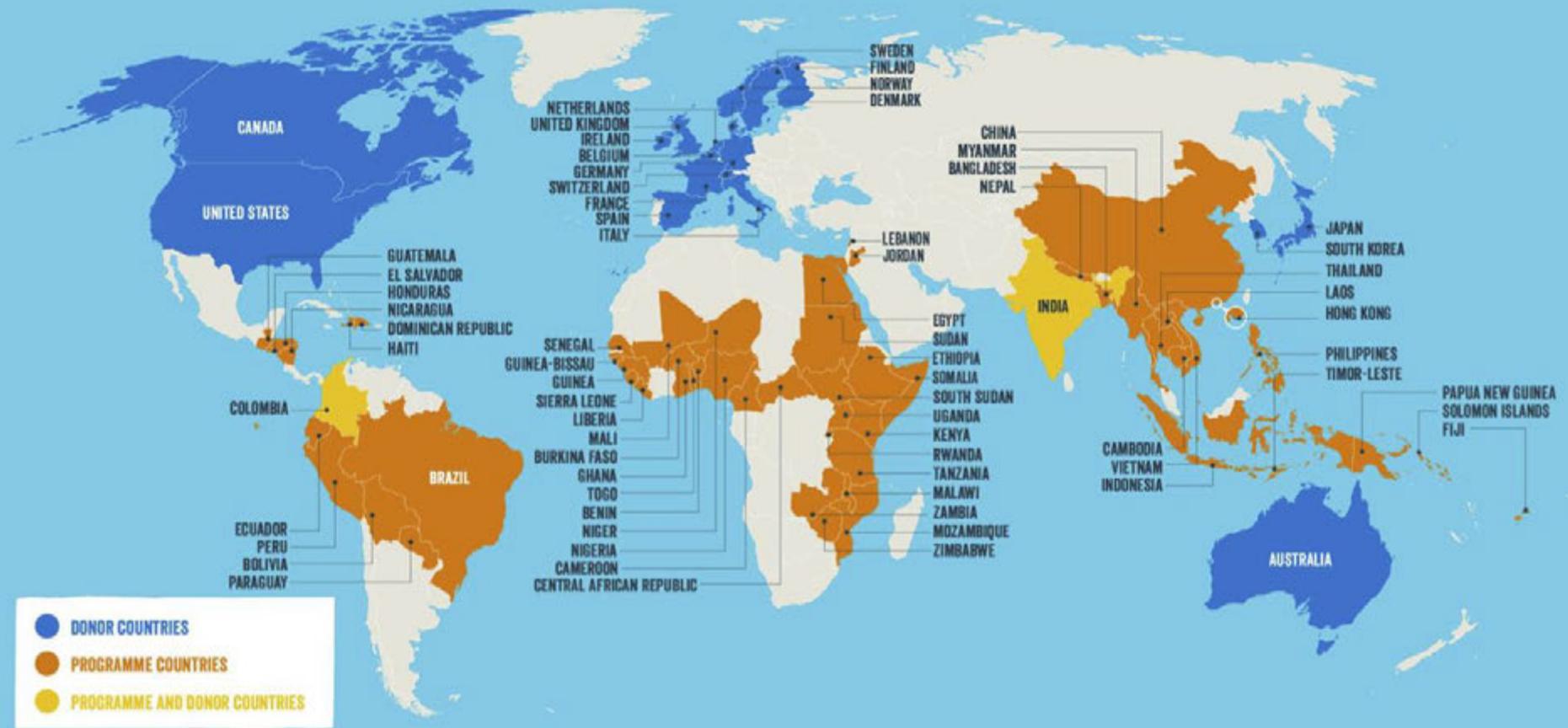
All grounded in an ethical, responsible approach to evidence and data.

Inclusive of: security, privacy, power disparities, safeguarding, civil liberties and human rights.

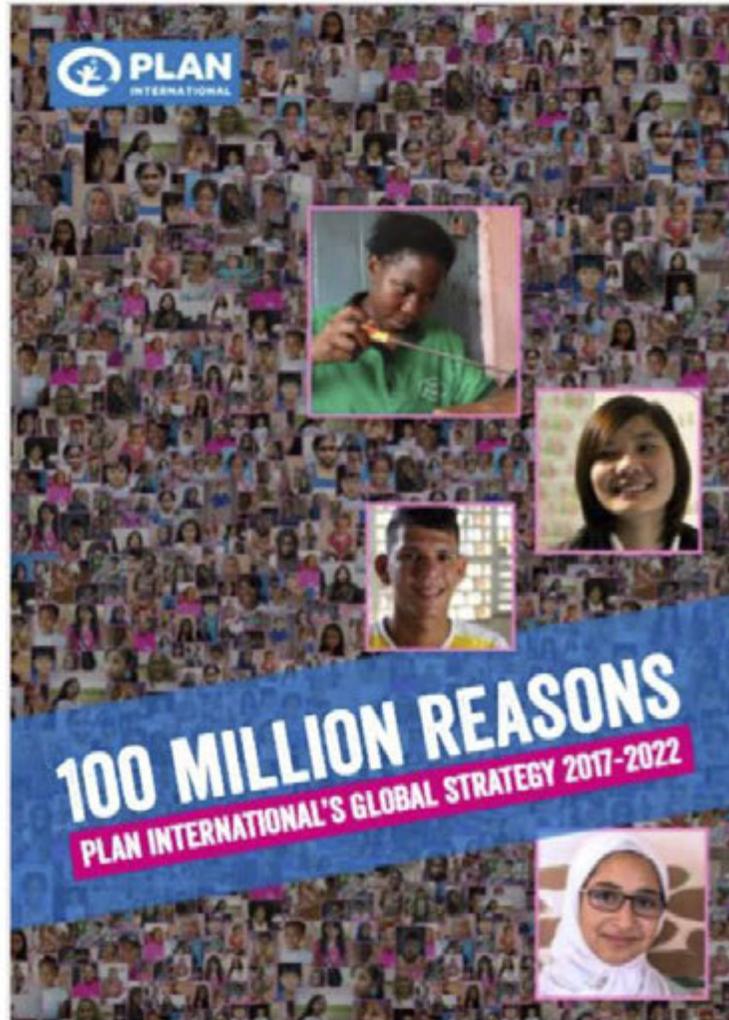
Plan International



WHO IS PLAN INTERNATIONAL AND WHY IS IMPACT IMPORTANT TO US?



PLAN'S GLOBAL STRATEGY...NEED FOR STRONG M&E



Global design for Monitoring, Evaluation and Learning

Sets out a roadmap for us becoming more consistent and coherent in the way we do monitoring, evaluation and learning from our programme and influence work

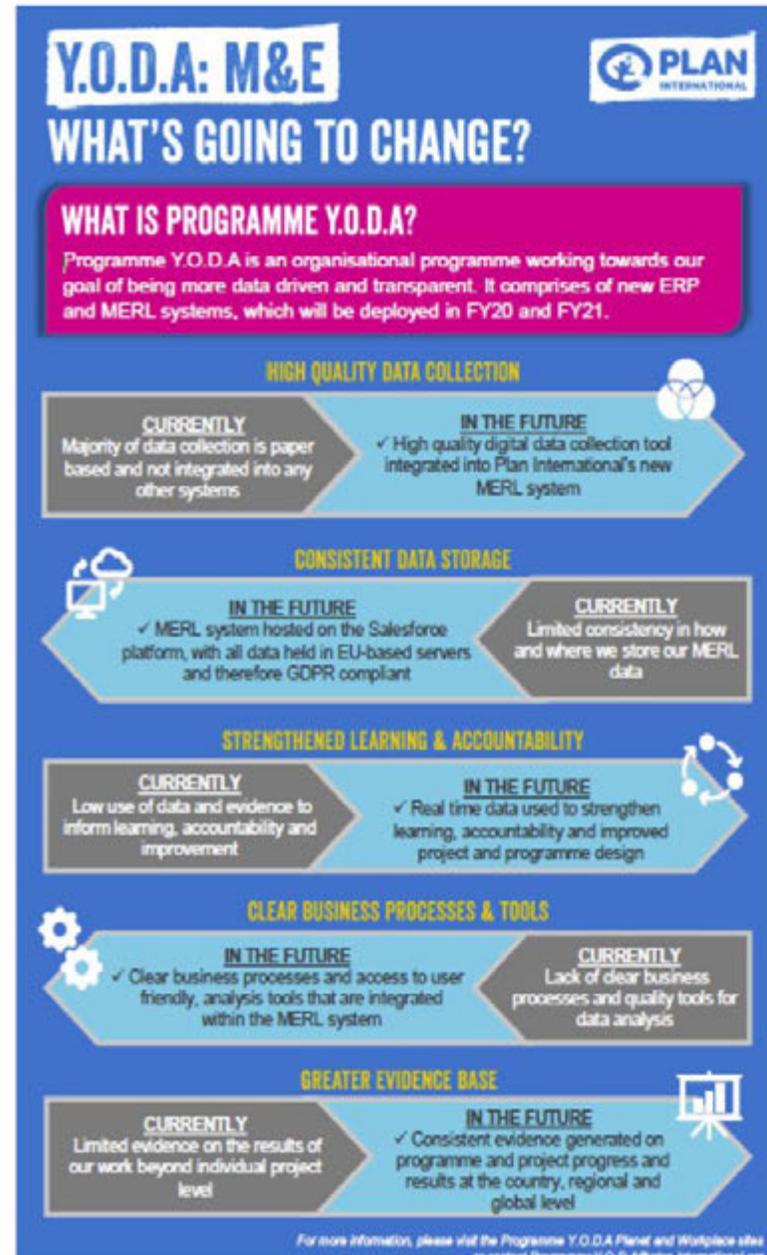
Y.O.D.A. & M&E: BENEFITS & ACCOUNTABILITY

Plan has a programme work works that consists of a suite of online and integrated tools that provide a joined up view of project results and financial data:

PMERL – M&E system and Project Management: project & programme implementation and programme/project results and the Gender Marker

D365 – project finances, logs and procurement, supply chain, grants

Data Warehouse – reporting and analytics



Next Steps

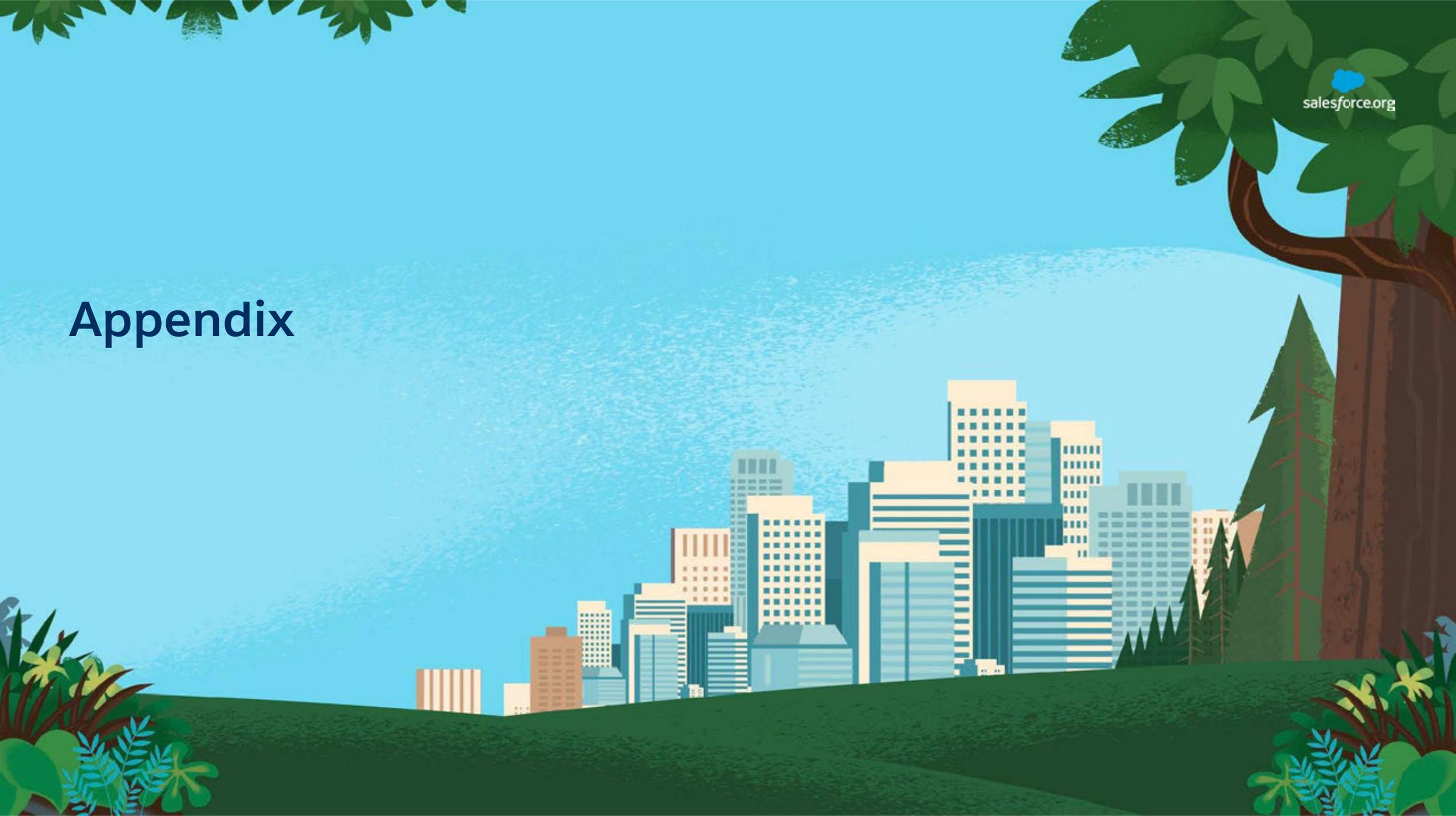


Power Your Impact Management Journey!

We are making available to Plan International up to 5 complementary impact management consultations. If your team would like to engage this offer please contact Andrew Means at AMeans@Salesforce.com.

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Appendix



The Impact Management Maturity Journey

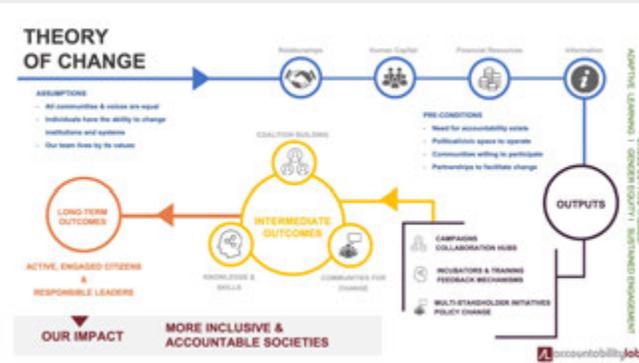
Helping drive customer impact maturity and growth.



Every Organization Should Be Able To...



Identify What Change They Are Working Towards



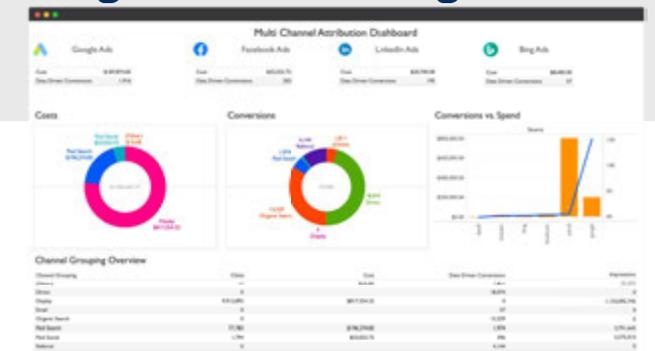
Organizations should have a clear theory of change, learning agenda, data strategy, and technology strategy that sets them up to manage the impact of their work.

Have Confidence in Where They Are Offering What Programs To Whom



Organizations should have clarity around what programs they are offering, where, and to whom. This allows greater clarity and allocation of resources to effective interventions.

Have Insight Into The Outcomes and Impact Their Programs Are Driving



Organizations should know the outcomes that their program beneficiaries are experiencing and begin to estimate their contribution towards those outcomes. They should be able to see this across all of their programs at once, managing their impact like they do their finances.

What Does This Journey Look Like?



Strategic Evidence Plan



Organizations should have a clear theory of change, learning agenda, data strategy, and technology strategy that sets them up to manage the impact of their work.

Program Inventory & Map



Organizations should have clarity around what programs they are offering, where, and to whom. This allows greater clarity and allocation of resources to effective interventions.

Program & Organizational Impact Dashboards



Organizations should know the outcomes that their program beneficiaries are experiencing and begin to estimate their contribution towards those outcomes. They should be able to see this across all of their programs at once, managing their impact like they do their finances.

Program Inventory & Map



-What programs are you offering where?

-Who is receiving those programs?

-Where are gaps in your programming?

-How does your programming map against community needs?

Schools | **What's Happening Now** | Search artlook by school, organization, program, or instructor | Search

Advanced Filters: Network | Creative Schools Category | Instructors Teaching | School Type | Number of Organization Partners | Programs Offered | Discipline Interests | Resource/Program

Chicago High School for the Arts | Contact School
2714 W Augusta Blvd, Chicago, IL 60622 / hmccowen@chiarts.org
Instructors Teaching: None
Partner Disciplines: Dance, Music, Visual Arts, Literary Arts, Media Arts, Theatre, Other

Chicago Intl Charter - Avalon / South Shore | Contact School
1501 E 83rd Pl, Chicago, IL 60619 / djones@cicsavalon.org
Instructors Teaching: None
Partner Disciplines: Theatre, Music, Visual Arts, Media Arts, Literary Arts, Dance, Other

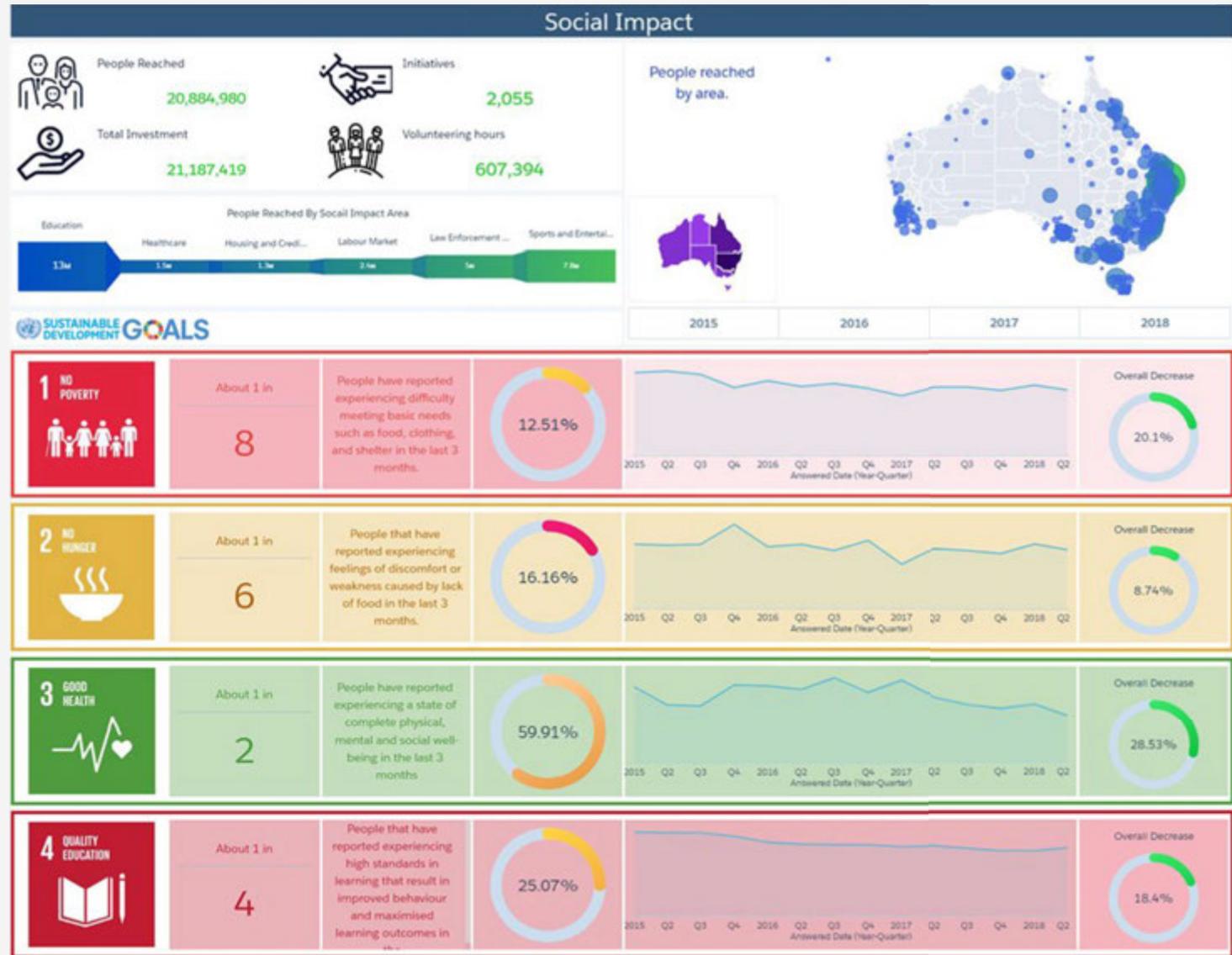
Chicago Intl Charter - Basil | Contact School
1816 W Garfield Blvd, Chicago, IL 60609 / rclark@cicsbasil.org



Impact Dashboard



- Program & Impact KPIs
- Understand your reach
- Identify trends in outcomes
- Manage Cost-per-Outcome and Cost-per-Marginal-Outcome
- Manage impact alongside operations and finance



Questions from Plan International

How Salesforce is Supporting Impact Management

Maturity Assessment. Impact Management Services.



The Rapid Assessment Offering

From Theory to Implementation

Strategy & Evaluation Consultants

Focused on theory and creating a plan but don't help organizations use technology to implement.

SI & ISV Partners

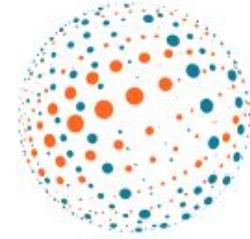
Focused on implementations of technology but aren't as regularly moving upstream to strategy and evaluation plans.



IMS CSG Pilot Updates



NETHOPE



volunteer ireland
obair dheonach éireann

What Customers Receive

Co-Creating a Strategic Evidence Plan with Customers



Theory of Change

The Theory of Change outlines what an organization is doing in the world that they believe is creating change.



Learning Agenda

The Learning Agenda identifies key questions the organization wants to answer and what methodologies they might use to answer them.



Data Collection Plan

The Data Collection Plan goes one level deeper and identifies all of the metrics that the organization wants to be collecting and how.



Technology Plan

The Technology Plan lays out the technologies that the organization might use to collect, analyze, visualize, and report its data.



The Impact Management Maturity Assessment

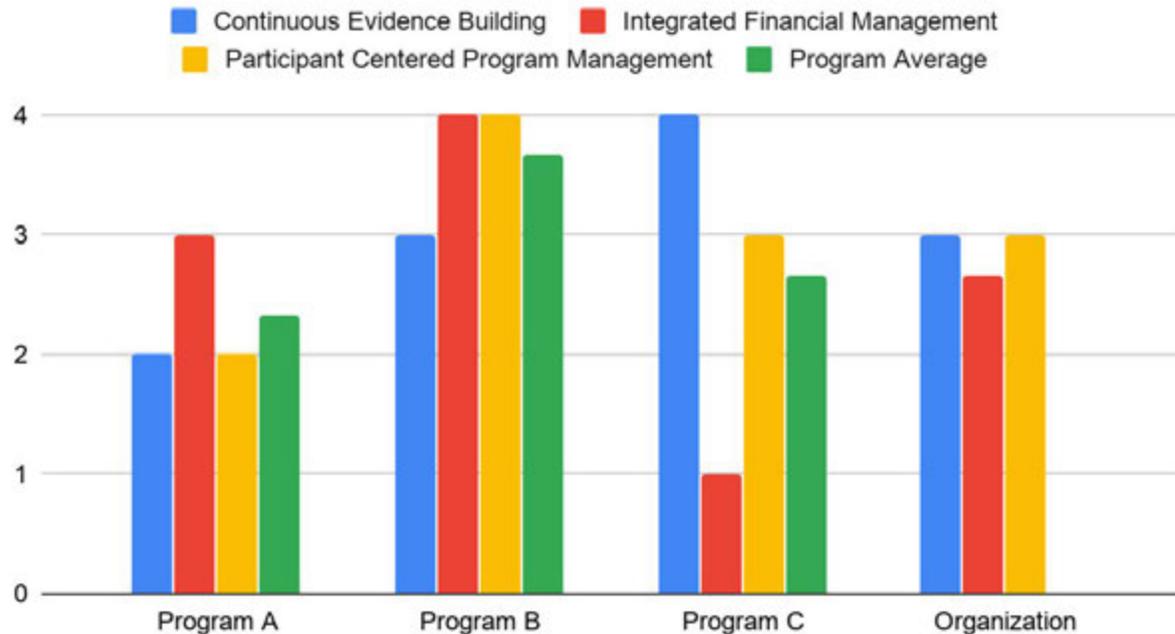


Understanding the maturity of your programs

| Capability | 1 | 2 | 3 | 4 | 5 |
|---|--|--|---|--|---|
| Continuous Evidence Building | Doesn't have the four elements of a strategic evidence plan | Has the four elements of a strategic evidence plan. | Additionally has detailed Logic Models for program interventions and is actively executing against their strategic evidence plan. | Regularly meets to review program outcomes and detail action steps to improve their impact. Utilizes assessments and other evaluation methodologies to identify and track outcomes and begin to infer impacts. | Adapt program elements utilizing predictive analysis and feedback from program participants with the intention of increasing the impact of the program. |
| Integrated Financial Management (For Grantees) | Don't talk about outcomes/impact in fundraising. | Lead with impact in fundraising and communications messaging. | Transparently share costs and program outcomes publicly and made digitally available for donors/funders. | Perform the necessary analysis and internally assign resources to maximize the overall impact of the organization. | Engage in outcome-based financing. |
| Integrated Financial Management (For Funders) | Reactive, funder oriented giving portfolio. | Funding portfolio focused on particular impact areas and resources are aligned to impact expectations. | Transparently share grant level impact information from grantees in a computer readable format. | Use real-time/regular analysis to determine how to re-assign funds for maximum impact. | Engage in outcome-based financing. |
| Participant Centered Program Management | Minimal program design and no digital tools utilized for program management. | Digital case management & field data collection tools in place. | Engaged in regular and consistent beneficiary feedback and adapt your program accordingly. | Beneficiaries engaged in program design, reflection, and evaluation. | Front-line staff have access to information to adapt program interventions in real-time. |

Your Maturity Report Card

Maturity Assessment Results



Program A Recommendations

- Develop logic models for the program
- Perform cost per impact analysis
- Add in beneficiary feedback system

Program B Recommendations

- Develop assessment to track change over time
- Develop decision-support tools for front-line staff

Program C Recommendations

- Implement a planning with data system for program management
- Identify 3 ways to incorporate impact into messaging
- Develop a beneficiary advisory board to support new program design

Questions from SSI & Thoughts



Automation of Data Collection

- Goal is to decrease the use of reported data and increase the use of observed and transactional data
- Collect data during service delivery
- Break data collection into multiple stages

Unburdensome Impact/Program Data Collection

- Balance cost & benefit
- Really about creating ROI for everyone involved in data collection

Giving People Their Data Back

- Planning with Data sessions (YMCA)
- Build into the culture (Crisis Text Line)
- Give beneficiaries insights they couldn't receive otherwise
- Give program staff decision support tools to improve impact

Questions from SSI & Thoughts



Learning & Development Resources

- Trailhead
- [Impact Management Trail](#)
- [Impacting Responsibly](#)
- [Impact Management Today](#)

Outcomes Measurement on Salesforce

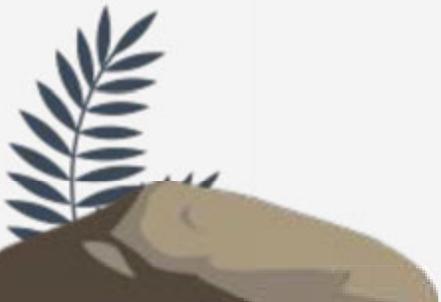
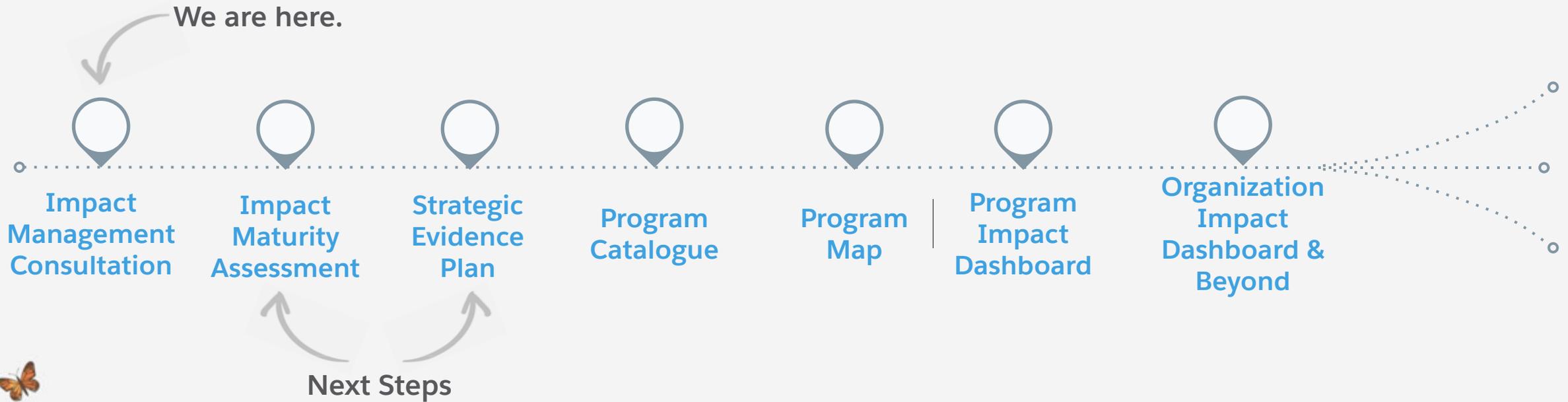
- Norwegian Refugee Council
- Skoll Foundation
- Aga Khan Foundation
- Catholic Relief Service
- YMCA
- Salvation Army
- Doxa Youth Foundation
- And So Many More

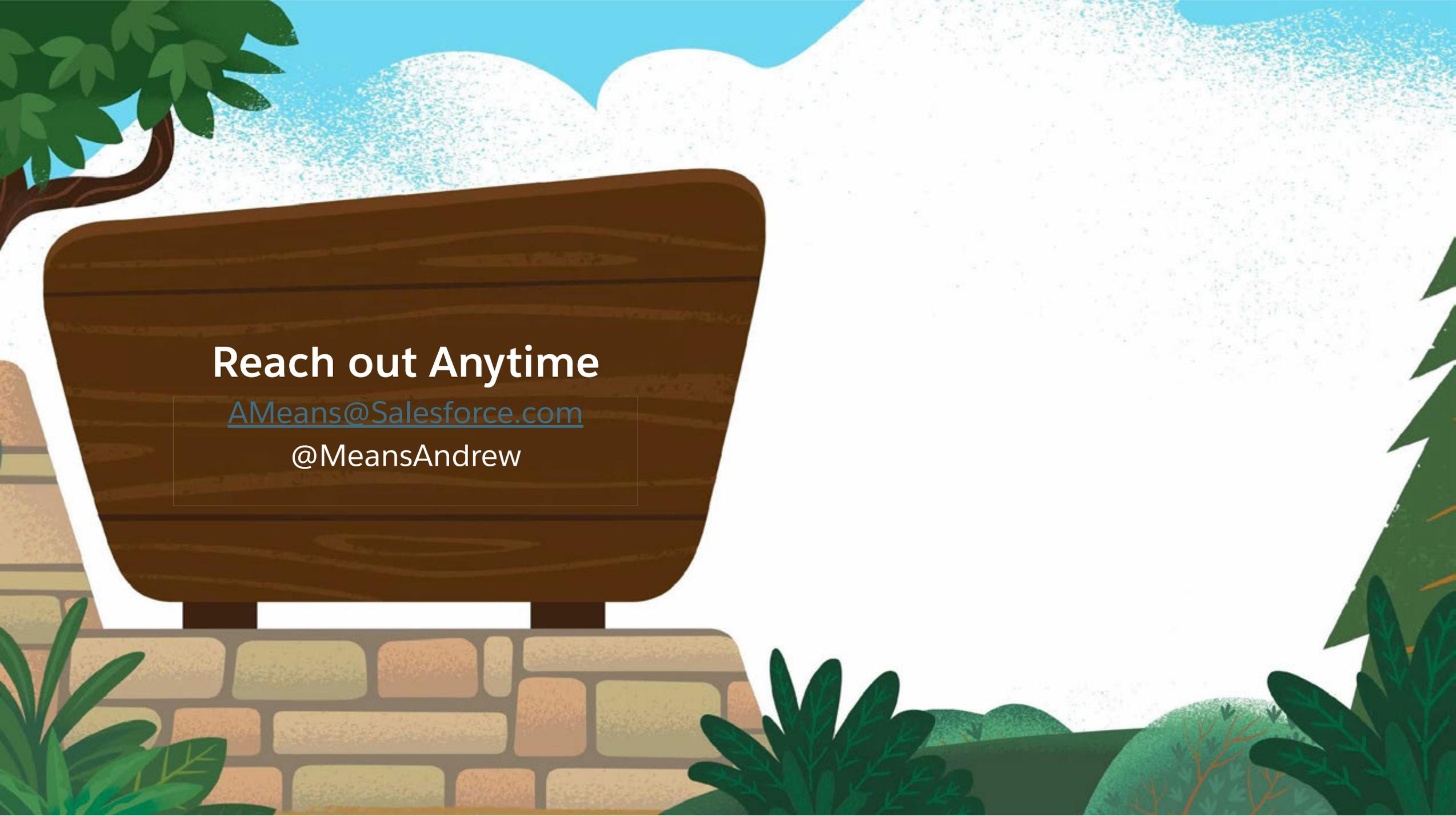
AI & Machine Learning in Service Delivery

- Yes! So many opportunities here.
- I used to help run [Data Science for Social Good](#) and a data science consulting firm focused on NGOs
- Target services to those that need them the most
- Predict drop-out risk
- Automate repeatable tasks
- So much opportunity.

The Impact Management Maturity Journey

Helping drive customer impact maturity and growth.



A wooden sign with a wood grain texture is mounted on a stone wall. The sign is dark brown and has rounded corners. It is supported by two small wooden posts. The background is a stylized illustration of a forest with green trees and a bright blue sky with white clouds. The sign is the central focus of the image.

Reach out Anytime

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@MeansAndrew

Driving Impact: Turning Inputs into Impact

