

Creating an impact model

A facilitated workshop guide

This is a simple guide to take you through the steps involved in developing an impact model.

Use this tool to:

- Understand the process to develop an impact model
- Create a draft impact model for your social enterprise

How to use this tool:

Use this as a guide to run your own impact model workshop. The best way to make an impact model is to get your team and key stakeholders together for a half day or whole day session to do the process described here, then you can go away and refine it.

The process described here is a general guide, as every impact model is unique.

You can use either sticky notes if you're all in the same room, or if you're online, a collaborative whiteboard like Mural or Miro works well.

See over the next page for a detailed facilitation guide and tips.

Start here

Step ONE | Gather



1 Write down your activities



2 Write down your stakeholders



3 Talk to stakeholders



4 Capture the outcomes on sticky notes

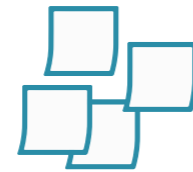


5 Reflect on the first sections

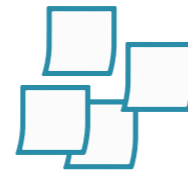


Step TWO | Order and connect

Short term



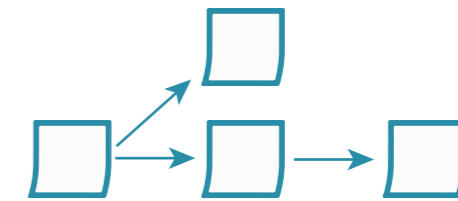
Med term



Long term



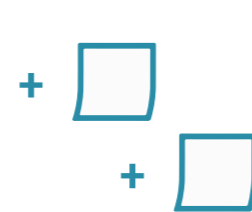
7 Remove double-ups



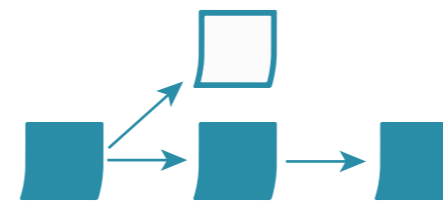
8 Identify links between outcomes



Step THREE | Your impact story emerges



9 Check your logic and add outcomes



10 Choose your key outcomes



11 Reflect on the whole picture



12 Tell your story of change



Continue to refine and develop



Step ONE | Gather

1 Write down your activities

These are the things you do to create positive impact. Think products or services, or programmes or donations you deliver with your profits.

2 Write down your stakeholders

These are the groups of people that are affected by your activities, or have an interest in them (e.g. major funders or partners). If it's environment, be specific about the location.

3 Talk to stakeholders

Understand what their goals are, and what changes for them because of the activities you do. You can also talk to funders and customers to understand if there are outcomes they want you to create.

4 Capture the outcomes

After the interviews gather all of your notes and extract the outcomes onto sticky notes. Think about outcomes that happen immediately, and outcomes that happen in the future.

5 Reflect on the first steps

Have you missed any outcomes that happen because of your activities, or for a particular stakeholder? Have you got outcomes that represent change across a period of time? If you think you are missing some, write more outcomes down.

Facilitator

Make sure the group focuses on the activities that will make the positive impact, not list all business activities like administration or marketing.

Make sure to keep the focus on key stakeholders that are interested in your impact specifically, rather than those that just buy your products and services.

If there are stakeholders present at your workshop (great!), give them space to speak about their thought and capture their ideas of sticky notes.

Keep to one outcome per sticky note, don't worry about double ups at this point. Try giving everyone their own sticky notes and get everyone to work individually for a few minutes.

Have the group ask themselves and discuss "after someone experiences this outcome, have we captured what happens next?"

Tips for Writing Outcomes

Outcomes are the changes that happen in people's lives because of your activities.

When writing outcomes, use language that indicates a change, for example:

- Increased confidence
- Reduced isolation
- Increased skills
- Reduced waste to landfill

Changes could be:

- Attitudes
- Values
- Behaviours
- Conditions

Step TWO | Order and connect

6 Move and group the sticky notes

Place all the sticky notes on a flat surface like a wall or whiteboard and begin to move them around so that they are grouped in a sensible way.

Facilitator

Encourage trying multiple options, such as putting them in a timeline from left to right, clustering similar outcomes together by who is affected, or by theme. Whatever feels right for your organisation!

7 Remove double-ups

You could write a new sticky note to summarise a group of similar outcomes then remove the ones that the summary replaces.

Encourage discussion on why you are removing double-ups, or why you are summarising. Make sure that everyone is on the same page.

8 Identify links between outcomes

Does it make sense that a certain outcome will lead to another outcome? Draw an arrow to connect them. Why does it make sense? Make a note of the research you have done, the evidence you are relying on, or the assumption you are making here.

You could note the research or evidence next to the outcome in a different colour, or note in a online document.

Step THREE | Your impact story emerges

9 Check your logic and add outcomes

Which outcomes are at the end of the model (usually on the right hand side)? Are these the ultimate outcomes or impact goals you are trying to achieve? If there is a gap in the story, add an outcome.

Facilitator

Add new outcomes in a different colour so you can clearly see changes for discussion. It can be helpful to read out "if this outcome changes, then this changes etc." to identify any big jumps in logic.

10 Choose your key outcomes

Look at the overall story that's evolving. Can you identify the 4-5 key outcomes that are vital to reaching your ultimate impact goal? These are likely to be the outcomes you will measure. You can also remove some of the outcomes - the ones that aren't linked by an arrow to your ultimate impact goal.

Measurement is not covered in this guide, but we have a separate resource on choosing impact indicators.

11 Reflect on the whole picture

If you read from left to right, does it make sense that each outcome would lead to the next outcome? Does it make sense to someone who hasn't seen it before? You can still add in an outcome to fill the gap even if that outcome is not being achieved yet.

12 Tell your story of change

Read from left to right and it should tell a compelling story of change. Come up with 1-3 sentences that summarise your impact. You can use your model, and these sentences to help you communicate your impact to people.

This guide was created as part of The Impact Initiative.

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www.theimpactinitiative.org.nz

