

Introduction to True Impact's Social Impact Reporting



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Our Approach

PRACTICAL IMPACT MEASUREMENT

FUNDER BENEFIT

Communicating Impact



- Standardized Indicators aligned with funder priorities that demonstrate program value in the most compelling terms
- Best Available Data ensures universal participation, regardless of nonprofit's measurement capacity
- Claim of Impact allocates the portion of the social outcome the funder "owns" based on amount and type of funding



More Support

- True Impact measurement specialist support assumes no outcomes measurement experience

Our Approach

PRACTICAL IMPACT MEASUREMENT

NONPROFIT BENEFIT



Comprehensive and Concise

- Nonprofits use logic model template to forecast and report to the funded program's end outcomes
- One report for all program stages (i.e., initial forecast, interim update, final report)



Credible and Sharable

- Nonprofits share success stories and lessons learned
- Nonprofits can share program with other stakeholders



Simple and Supported


- Step-by-step guidance assumes no outcomes measurement experience
- Custom guidance and feedback available through True Impact
- Clone reports to forecast next year's report
- Best available data approach

Social Impact Report

Overview Impact Model Narrative Finances 👍 Ratings 🖨️

Of the donors supporting this program, display Impact Receipt for:

Teaching for Equity and Justice



We engage young people in deep civic learning by providing challenging content through a process that builds knowledge, skills, and dispositions. Our classes integrate the study of history and literature with ethical decision-making and innovative teaching strategies.

Location:
 Chicago, IL, USA; Boston, MA, USA; Oakland, CA, USA; Dallas, TX, USA; Detroit, MI, USA; New York, NY, USA

Content updates:

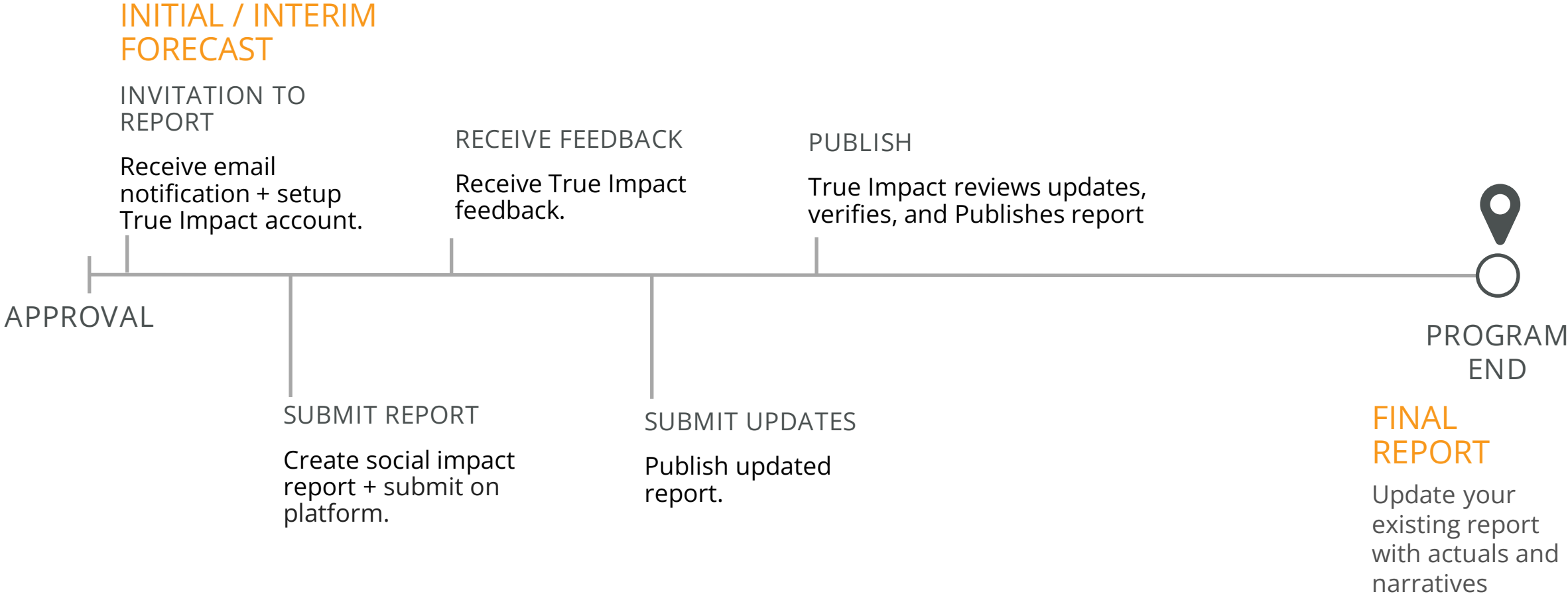
Impact Receipt® for...
 TEST ORG
 Investment:
 \$500,000.00
 Report Stage:
 Initial
 Last Updated:
 08 Oct 2021

Jun 30, 2021 Program start ————— Jun 30, 2022 Program end

Portion Funded 71% <small>of total cost</small>	Investment Type Foundational <small>from options: incremental, significant, or foundational</small>	Funder's Claim (enabled all of the outcomes, including...) 750 people gain safe and affirming environments 1,000 strengthen their civic engagement
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Overview	Name, description, start/end date of report, logo, and report stage. <i>If relevant, refer to funder-specific guidelines regarding what type of report to create.</i>
Intervention	Social category, type of intervention, frequency and duration of engagement, and description (text).
Beneficiaries	Location, demographic categories (%), description (text). <i>Where possible, please provide gender, ethnicity, social and economic status percentages.</i>
Outcomes	Logic model template, relevant indicators, indicator customization, backup documentation, notes. <i>If relevant, refer to funder-specific guidance on logic model templates.</i>
Budget	Direct (cash, in-kind) and overhead (cash, in-kind), backup documentation, notes.
Narrative	Success stories, lessons learned (final report only).

Reporting Process

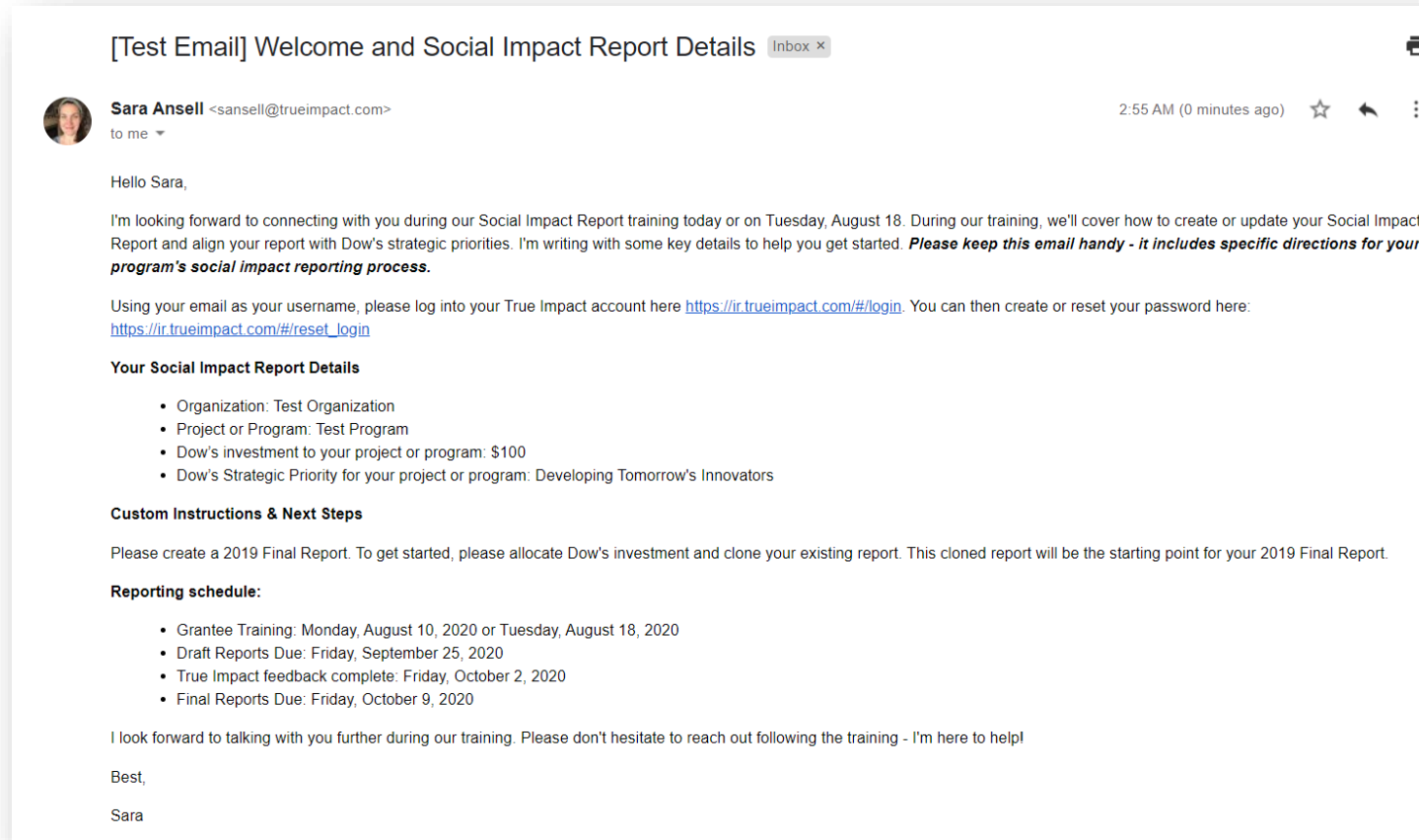


Step 1


Creating an account &
Allocating investment

Invitation

Use credentials in the invitation to create your account or login to an existing account



[Test Email] Welcome and Social Impact Report Details Inbox x

 **Sara Ansell** <sansell@trueimpact.com>
to me ▾ 2:55 AM (0 minutes ago) ☆ ↶ ⋮

Hello Sara,

I'm looking forward to connecting with you during our Social Impact Report training today or on Tuesday, August 18. During our training, we'll cover how to create or update your Social Impact Report and align your report with Dow's strategic priorities. I'm writing with some key details to help you get started. ***Please keep this email handy - it includes specific directions for your program's social impact reporting process.***

Using your email as your username, please log into your True Impact account here <https://ir.trueimpact.com/#/login>. You can then create or reset your password here: https://ir.trueimpact.com/#/reset_login

Your Social Impact Report Details

- Organization: Test Organization
- Project or Program: Test Program
- Dow's investment to your project or program: \$100
- Dow's Strategic Priority for your project or program: Developing Tomorrow's Innovators

Custom Instructions & Next Steps

Please create a 2019 Final Report. To get started, please allocate Dow's investment and clone your existing report. This cloned report will be the starting point for your 2019 Final Report.

Reporting schedule:

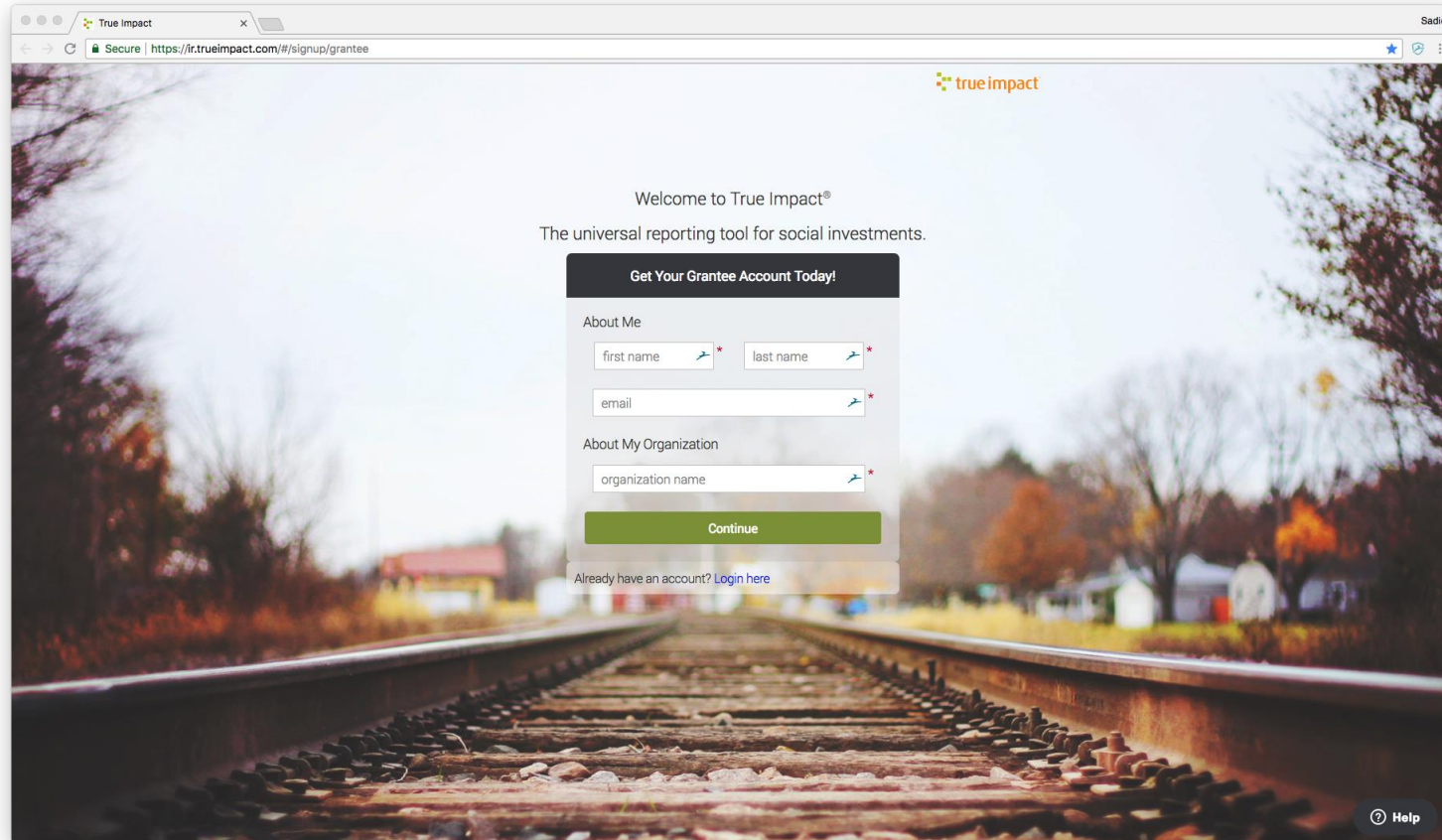
- Grantee Training: Monday, August 10, 2020 or Tuesday, August 18, 2020
- Draft Reports Due: Friday, September 25, 2020
- True Impact feedback complete: Friday, October 2, 2020
- Final Reports Due: Friday, October 9, 2020

I look forward to talking with you further during our training. Please don't hesitate to reach out following the training - I'm here to help!

Best,
Sara

Login

Use credentials in the invitation to create your account or login to an existing account



The screenshot shows a web browser window with the True Impact logo in the top right corner. The main heading reads "Welcome to True Impact®" followed by the tagline "The universal reporting tool for social investments." Below this is a dark button labeled "Get Your Grantee Account Today!". The form is divided into two sections: "About Me" with fields for "first name", "last name", and "email"; and "About My Organization" with a field for "organization name". A green "Continue" button is positioned below the organization name field. At the bottom of the form, there is a link that says "Already have an account? [Login here](#)". A "Help" icon is located in the bottom right corner of the page.

Manager Users

Add additional users once the account is created

The screenshot shows the True Impact web application interface. The browser address bar displays 'ir.trueimpact.com/?#/account/users'. The top navigation bar includes 'Organization', 'Manage Users', and 'My Account'. The left navigation bar contains 'TO DO', 'REPORTS', 'REPORTS RATINGS', 'INVESTMENTS', 'ACCOUNT', 'HELP', and 'SIGN OUT'. The main content area is titled 'Manage Users' and features an 'Add User' button and a table with columns 'Name' and 'E-mail'. A table entry shows 'Jane Doe I' and 'esarmiento+RMFgrantee1@trueim'. Three green circles with numbers 1, 2, and 3 are overlaid on the interface: circle 1 points to the 'ACCOUNT' menu item, circle 2 points to the 'Manage Users' tab, and circle 3 points to the 'Add User' button.

Add Users

- In Left navigation bar, click ACCOUNT
- In top navigation bar, click Manager Users
- Click + Add User button
- Include organizational collaborators

Report PDF

- In Left navigation bar, click INVESTMENTS
- Click on print icon to print (and share) your report Impact Receipt

Allocate Investment

1

Allocate and Confirm
Investment

Confirm Investment

Allocate Investment

1

Allocate and Confirm Investment

Confirm Investment

2

Select Relevant Programs to Fund

A. Select Existing Report(s)

B. Clone Existing Report(s)

C. Create Brand New Report(s)

Allocate Investment

1

Allocate and Confirm Investment

Confirm Investment

2

Select Relevant Programs to Fund

A. Select Existing Report(s)

B. Clone Existing Report(s)

C. Create Brand New Report(s)

3

Allocate and Classify Investment

- Incremental (A non-primary contribution to overall funding)
- Significant (One of the largest contributions)
- Foundational (Catalyzed other investors, or its absence might have undermined program viability)

Apply Investment

Draft Report

Your new report shows up in *Reports to be submitted or published*

The screenshot shows a web browser window at ir.trueimpact.com/#/todo. The dashboard has a dark sidebar with the True Impact logo and navigation links: TO DO (14), REPORTS, REPORTS RATINGS, INVESTMENTS, ACCOUNT, HELP, and SIGN OUT. The main content area is divided into three sections:

- Funding Applications: 0**: All applications have been accepted!
- Investments to be allocated: 0**: All investments have been allocated!
- Reports to be submitted or published: 9**: A table with columns for Program or Initiative Name / Funding Term, Status, and Initial Content.

Program or Initiative Name / Funding Term	Status	Initial Content
1. Program Report (2018)	Final Report (Not Yet Submitted for Review)	<ul style="list-style-type: none">Overview: <input checked="" type="checkbox"/>Intervention: <input checked="" type="checkbox"/>Beneficiaries: <input checked="" type="checkbox"/>Outcomes: <input type="checkbox"/>Budget: <input type="checkbox"/>Narratives: <input checked="" type="checkbox"/> Update

An arrow points from the 'Funding Applications' section to the 'Update' button in the table.

Step 2

Submitting a report

Overview

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#report-wizard/4692/overview/description`. The page title is "Global Engagement" and the user is logged in as "North Way". The interface includes a sidebar with navigation options: "Report Builder", "DASHBOARD", "OVERVIEW" (with sub-items: Name, Description, Date Range, Logo, Stage), "INTERVENTION", "BENEFICIARIES", "OUTCOMES", "BUDGET", "IMPACT RECEIPT", and "SUBMIT". The main content area is titled "Briefly describe Global Engagement" and contains three instructional paragraphs, a text input field, a "100 words remaining" indicator, a validation message "A program description is required.", and four action buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next". A "More Info" button is also visible on the right side of the main content area.

Name and describe the program

- If this is a *gala, luncheon, or general operations grant*, report on your total programmatic efforts
- If this is a *convention*, describe the event and its outcomes on participants and organizations

Overview

- Report Builder -

DASHBOARD

OVERVIEW

- Name
- Description
- Date Range
- Logo
- Stage

INTERVENTION

BENEFICIARIES






OUTCOMES

BUDGET

SUBMIT

[Return to Main Menu](#)

What is the time period you are reporting on?

-  Most programs report for a single year of operations, even if they have multi-year commitments from donors (unless it's a new program still in development, or a multi-year education initiative). 
-  If this is a continuously operating program, consider using the calendar year or your organization's fiscal year. 
-  If this report is for a donation made to a fundraiser, report on the dates of program being funded, not the fundraiser.

Report Start Date:

01 Jul 2021

Report End Date:

01 Jul 2022

Duration: 366 Days

 Page entries are valid.

Add report date range:
consider these dates the bookends of your report

[Save & Back](#)

[Save & Return to Dashboard](#)

[Save & Next >](#)

Overview

DASHBOARD

OVERVIEW

- Name
- Description
- Date Range
- Logo
- Stage

INTERVENTION

BENEFICIARIES

OUTCOMES

BUDGET

SUBMIT

[Return to Main Menu](#)

Add your organization or program logo

- 💡 Ensure it is complete, easy to read, and centered.
- 💡 If appropriate, consider using a simplified version of your logo, as is often used for Twitter.



Add a small logo

A logo is required.

Stage

SELECT THE CURRENT REPORT STAGE



Initial Forecast (i.e., the program has not started, or is just starting, so the content represents your 'best guess' of what will be achieved)

Stage

SELECT THE CURRENT REPORT STAGE



Interim Report (i.e., the funded program is in progress, and the content has been updated to contain your latest expectations of what will be achieved)

Stage

SELECT THE CURRENT REPORT STAGE



Final Report (i.e., the funded program has been completed)

Intervention

What is Global Engagement's primary social cause?

- 💡 If your program could be reasonably be placed in multiple categories, choose the one you consider most important or fundamental
- 💡 Your selection should also represent your most relevant peer group (for sharing best practices among similar organizations)

↶ Reset To Original

- 🌿 Agriculture, fishing and forestry
- 🐾 Animal welfare (domesticated)
- 🎨 Arts and culture
- 🏠 Community and economic development
- 🚚 Disasters and emergency management
- 📖 Education
- 🌳 Environment
- 👤 Health
- 🏠 Housing
- ⚖️ Human rights
- 👥 Human services
- 🍴 Hunger

1. Primary social cause example:

- Education > Primary and Secondary Education

2. Select intervention type:

- Direct Service
- Capacity Development
- Policy and Advocacy

3. Program duration and frequency:

- Length of engagement with beneficiaries

4. Additional information

- Opportunity to add more detailed programmatic information

Location

True Impact

Global Engagement

STAGE: Initial Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: North Way

North Way

Report Builder

DASHBOARD

OVERVIEW

INTERVENTION

BENEFICIARIES

Locations

Demographics

Description

OUTCOMES

BUDGET

CUSTOM QUESTIONS

IMPACT RECEIPT

SUBMIT

Return to Main Menu

What location(s) does Global Engagement serve?

- Report at the city level if possible, but if the service area is larger than that, report at the county, state, province, region, or country level, as appropriate.
- To ensure your location is recognized by our system, select an option from the autocomplete list that generates under the field you are typing in.

Service Location (1) *

Westchester County, NY, USA

+ add location

Page entries are valid.

< Save & Back

Save & Return to Dashboard

Save & View Impact Receipt

Save & Next >

More Info

Help

Identify your program location(s)

Beneficiaries

- Report Builder -

- DASHBOARD
- OVERVIEW
- INTERVENTION
- BENEFICIARIES**
 - Locations
 - Demographics**
 - Description
- OUTCOMES
- BUDGET
- SUBMIT

[Return to Main Menu](#)

Describe the demographics of the beneficiaries served by TEST

- Select all demographic categories you can reasonably report on, to addresses the varying interests of different funders that may view this report.
- Be as precise as possible in reporting your percentages, but estimates are fine.
- Report only on the target 'end beneficiaries' of your program; do not include intermediaries or service providers.

Demographic	Percentage
Children and youth	100 %
K-12	50 %
Females	50 %
Males	50 %
LGBTQ	15 %
Multiracial people	25 %
At-risk youth	25 %

+ add/edit demographic

✓ Page entries are valid.

Select all relevant demographic categories:

- they don't need to equal 100%
- don't leave any blank

Demographics

Name	Description
Category: Age & Identity	
<input checked="" type="checkbox"/> Children and youth	Young people from birth to 18 years of age
<input type="checkbox"/> Infants and toddlers	Young people from birth to 2 years of age
<input type="checkbox"/> Children	Young people from 3 to 9 years of age
<input type="checkbox"/> Preteens	Young people from 10 to 12 years of age
<input type="checkbox"/> Adolescents	Young people aged 13-18 years of age
<input checked="" type="checkbox"/> K-12	Young people aged 5-19 years of age
<input type="checkbox"/> Adults	People 19 years of age and older.
<input type="checkbox"/> Seniors	People 65 years of age and older.
<input checked="" type="checkbox"/> Females	Women and girls; those usually identified as female, or who self-identify as female.
<input checked="" type="checkbox"/> Males	Men and boys; those usually identified as male, or who self-identify as male.
<input checked="" type="checkbox"/> LGBTQ	Lesbian, gay, bisexual, and transgender people, as well as those who identify as queer and are questioning their sexual identity.
Category: Ethnic & Racial Groups	
<input type="checkbox"/> People of Middle Eastern descent	People with ancestral relations to indigenous inhabitants of Western Asia (not including the Caucasus) and Egypt.
<input type="checkbox"/> People of Asian descent	People having origins in any of the original peoples of the Far East, Southeast Asia, Central Asia, or the Indian subcontinent.
<input type="checkbox"/> People of African descent	People having origins in any of the Black racial groups of Africa.
<input type="checkbox"/> People of European descent	People having origins in any of the original peoples of Europe.
<input type="checkbox"/> People of Latin American descent	People having ancestral origins in Europe (especially Iberia), Africa, and the New World; having more proximate backgrounds in the New World; who share elements of cultural heritage, language (often Spanish or Portuguese), national identity, and lineage; and who represent a variety of racial and ethnic identities.
<input type="checkbox"/> Indigenous peoples	Peoples and nations that have a historical continuity with pre-invasion and pre-colonial societies that developed on their territories, and consider themselves distinct from other sectors of the societies now prevailing in those territories, or parts of them.
<input checked="" type="checkbox"/> Multiracial people	People having more than one strong racial, ethnic, or cultural identity or ancestry.
Category: Social & Economic Status	

Taxonomy Source: Candid.org (formerly GuideStar + Foundation Center)



Beneficiaries

- Report Builder -

- DASHBOARD
- OVERVIEW
- INTERVENTION
- BENEFICIARIES
 - Locations
 - Demographics
 - Description
- OUTCOMES
- BUDGET
- SUBMIT

[Return to Main Menu](#)

Briefly provide any additional descriptive information on the beneficiaries served by TEST

-  This is an opportunity to provide a more detailed picture of the people whose lives are being improved by your program, which can make your social impact report more relatable and compelling to readers.
-  Report only on the target 'end beneficiaries' of your program; do not include intermediaries or service providers.

TEST

249 words remaining.

 Your entry is very short. Please consider entering more detail describing the beneficiaries. [Dismiss/Not Relevant](#)

[Save & Back](#)

[Save & Return to Dashboard](#)

[Save & Next >](#)

Add any notes relevant to your beneficiaries.
Note the option to dismiss alerts as not relevant.

Logic Model

True Impact uses a 5 stage logic model to define success and measure outcomes



Example Logic Model: Education



PROGRAM
DEVELOPMENT

REACH

LEARN

ACT

SUCCEED

Program is strengthened

To better engage
people

Who gain capacity and
motivation

To change behavior

So lives are improved

Staff, volunteers added

Policies created

Programs enhanced

Collaborations created

Influencers activated

Resources developed

Tools or systems created

Policies created, modified

People reached

People gain capacity,
motivation

People take action

Students improve school attendance

Students improve behavior

Succeed in school

Students graduate high school on
time

Access post-secondary education

Earn post-secondary degree,
credential

Attain, retain, or improve
employment

Logic Model Selection

True Impact

Global Engagement

STAGE: Initial Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: North Way

CAPACITY DEVELOPED → REACHED → LEARN → ACT → SUCCEED (SOCIAL IMPACT)

Our model. We use a simple model of behavior change typical of most social investment programs (i.e., provide services to beneficiaries, who gain skills or knowledge, then take action to improve their lives):

Our approach. The platform guides you to identify which stages are relevant to your program, and then customize the specific details (i.e., how you define and measure success). Also:

- If your program provides capacity development or policy and advocacy support, that will be added as an initial stage to your model. (Then you can demonstrate how those efforts improve the rest of the Reach, Learn, Act, Succeed model).
- If your program provides only goods (e.g., food, shelter) without a behavior change component, then the "Learn" and "Act" stages will not be relevant and will be excluded from your model.
- You will NOT be asked to gather any new data to complete your model. If you do not directly measure an outcome, you will be guided to estimate or guess the results (and label them accordingly).

This step-by-step approach enables you and your donors to calculate at least a basic-level social return on investment (SROI) of any program – information vital to understanding its strengths and weaknesses, and how to drive program improvement.

When you are ready to begin, click "Select a Service" below.

Select a Service >

Help

Key steps in the outcomes section:



Select indicators that are meaningful to your program in Outcomes > Relevant



Define threshold of success in step 1 of Outcomes > Indicators



Define measurement approach in Step 5: Describe process

Logic Model Selection

The screenshot shows a web browser window with the URL `ir.trueimpact.com/?#/report-wizard/6870/outcomes/services`. The page title is "Global Engagement ('20 - '21)" and the user is logged in as "North Way". The left sidebar contains a navigation menu with the following items: Dashboard, Overview, Intervention, Beneficiaries, Outcomes (with sub-items: Services, Relevant, Indicators, Documentation, Notes), Budget, Custom Questions, Impact Receipt, and Submit. The main content area is titled "Select the category that best describes the services provided by Global Engagement". It includes two instructional paragraphs: "If your program could be reasonably be placed in multiple categories, choose the one you consider most important or fundamental" and "Your selection should also represent your most relevant peer group (for sharing best practices among similar organizations)". Below these are four radio button options: "Economic Opportunity", "Youth", "Safety", and "Neighborhoods". The "Neighborhoods" option is selected. A red dashed arrow points from a callout box to the "Safety" option. At the bottom, there is a search bar for the "Full Services Taxonomy" and a "Save & Next" button.

Global Engagement ('20 - '21) North Way

STAGE: Interim Report STATUS: Published PROGRAM MANAGER: North Way

Select the category that best describes the services provided by Global Engagement

If your program could be reasonably be placed in multiple categories, choose the one you consider most important or fundamental

Your selection should also represent your most relevant peer group (for sharing best practices among similar organizations)

Economic Opportunity
Economic Opportunity

Youth
Youth

Safety
Safety

Neighborhoods
Neighborhoods

Or search our entire taxonomy for the service that best matches your requirements.

Search Full Services Taxonomy

Page entries are valid.

< Save & Back Save & Return to Dashboard Save & View Impact Receipt Save & Next >

Select the most appropriate template

Logic Model Stage: Program Development

Global Engagement ('20 - '21) North Way

STAGE: Interim Report STATUS: Published PROGRAM MANAGER: North Way

Select the relevant results at each stage

- Include all significant expected results, regardless of your ability to measure them.
- Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones.

More Info

Neighborhoods Impact Model

PROGRAM DEVELOPMENT → REACHED → LEARN → ACT → SUCCEED (SOCIAL IMPACT)

Select your relevant Program Development performance indicators:

- Staff/Volunteers/Implementers Added, Trained** [configure details ▶]
Number Of People Recruited Or Hired Into Paid Or Unpaid Positions To Improve Or Expand Program Implementation; And/Or Number Of New Or Existing Program Staff Or Program Collaborators (Community Members, Civic Leaders, Family Members Or Caregivers, Members Of Partner Organizations Or Initiatives) Provided Skills, Knowledge, Resources, Or Incentives To Improve Or Expand Program Implementation.
- Policies Created, Modified**
Number Of Policies Created, Adopted, Or Modified By Organizations (E.G., Companies, Nonprofit Networks) Or Governments (E.G., Local, State, Federal, Intergovernmental) To Achieve A Particular Purpose Through New Funding, Incentives, Standards, Rules, Supplemental Services, Or Other Support.
- Programs Or Services Created, Enhanced**
Number Of Programs Or Services Created, Expanded, Or Improved.
- Organizations Or Collaborations Created, Expanded** [configure details ▶]
Number Of New Organizations Created; Existing Organizations Expanded; Or Partnerships, Coalitions, Or Collaborations Created Or Expanded To Leverage Existing Resources, Activities, And Capacities To Achieve Greater Results.
- Other Program Development (Custom Definition)**

Logic Model Stages

1. PROGRAM DEVELOPMENT

staff trained, policies created, programs or services enhanced, program resources developed, collaborations expanded

2. REACH

3. LEARN

4. ACT

5. SUCCEED (SOCIAL IMPACT)

Logic Model Stage: Reach

The screenshot shows a web browser window with the True Impact logo and navigation menu on the left. The main content area is titled "Global Engagement ('20 - '21)" and "Select the relevant results at each stage". It includes instructions on selecting results and a "Neighborhoods Impact Model" flow diagram. The "REACHED" stage is highlighted, and a selection box shows "Served" as a relevant indicator. A "More Info" button is visible on the right side of the interface.

Global Engagement ('20 - '21)
STAGE: Interim Report STATUS: Published PROGRAM MANAGER: North Way

Select the relevant results at each stage

- Include all significant expected results, regardless of your ability to measure them.
- Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones.

Neighborhoods Impact Model

PROGRAM DEVELOPMENT → REACHED → LEARN → ACT → SUCCEED (SOCIAL IMPACT)

Select your relevant Reached performance indicators:

- Served [configure details ▶]
Number Of Residents Served By Program, Resources, Or Services

< Previous Stage Save & Return to Dashboard Save & View Impact

Page entries are valid.

- Logic Model Stages
1. PROGRAM DEVELOPMENT
 2. REACH
Number of people served or participate
 3. LEARN
 4. ACT
 5. SUCCEED (SOCIAL IMPACT)

Logic Model Stage: Learn

The screenshot shows the True Impact web application interface. The browser address bar displays the URL: `ir.trueimpact.com/?#/report-wizard/6870/outcomes/relevant`. The page title is "Global Engagement ('20 - '21)" with a user profile for "North Way". The status is "Interim Report" and "Published", with "PROGRAM MANAGER: North Way".

The main heading is "Select the relevant results at each stage". Below this, there are two lightbulb icons with text: "Include all significant expected results, regardless of your ability to measure them." and "Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones." A "More Info" button is on the right.

The "Neighborhoods Impact Model" section shows a progress bar: "PROGRAM DEVELOPMENT → REACHED → **LEARN** → ACT → SUCCEED (SOCIAL IMPACT)".

Under "Select your relevant Learn performance indicators:", there is a checkbox for "Beneficiaries Gain Capacity, Motivation" with a description: "Number Of Residents That Gain The Skills, Knowledge, Access To Resources, Appreciation, Or Increase Safety Or Improve Their Neighborhood." Below this are buttons for "Previous Stage", "Save & Return to Dashboard", and "Save & View Impact".

A green checkmark message at the bottom states: "Page entries are valid."

Logic Model Stages

1. PROGRAM DEVELOPMENT

2. REACH

3. LEARN

Number of people that gain the skills, knowledge, access to resources to improve their wellbeing

4. ACT

5. SUCCEED (SOCIAL IMPACT)

Logic Model Stage: Act

The screenshot shows a web browser window with the True Impact logo and navigation menu on the left. The main content area is titled "Global Engagement ('20 - '21)" and "Select the relevant results at each stage". It includes instructions on selecting results and a progress bar for the "Neighborhoods Impact Model" with stages: PROGRAM DEVELOPMENT, REACHED, LEARN, ACT (highlighted), and SUCCEED (SOCIAL IMPACT). A form for "Select your relevant Act performance indicators:" contains a checkbox for "Take Action" with a description. Navigation buttons and a validation message are also visible.

Logic Model Stages

1. PROGRAM DEVELOPMENT
2. REACH
3. LEARN
- 4. ACT**
Number of people that take action or change behavior to improve their wellbeing, etc.
5. SUCCEED (SOCIAL IMPACT)

Logic Model Stage: Succeed

The screenshot shows the True Impact report builder interface for a report titled "Global Engagement ('20 - '21)". The interface is divided into a left sidebar and a main content area. The sidebar contains a navigation menu with sections: DASHBOARD, OVERVIEW, INTERVENTION, BENEFICIARIES, OUTCOMES (with sub-items: Services, Relevant, Indicators, Documentation, Notes), BUDGET, CUSTOM QUESTIONS, IMPACT RECEIPT, and SUBMIT. The main content area displays the "Logic Model Stages" configuration. The stages are: PROGRAM DEVELOPMENT, REACHED, LEARN, ACT, and SUCCEED (SOCIAL IMPACT). The "SUCCEED (SOCIAL IMPACT)" stage is highlighted in yellow. Below the stages, there is a section titled "Select your relevant Succeed (Social Impact) performance indicators:" with a list of indicators, each with a checkbox and a description. The indicators are: Sustainably Housed (checked), Improve Neighborhood Satisfaction, Quality Of Life, Houses Improved, Maintained, People Vote, Properties Improved, Restored, and Become Homeowner.

Global Engagement ('20 - '21)
STAGE: Interim Report STATUS: Published PROGRAM MANAGER: North Way

Select the relevant results at each stage

- Include all significant expected results, regardless of your ability to measure them.
- Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones.

Neighborhoods Impact Model

PROGRAM DEVELOPMENT → REACHED → LEARN → ACT → **SUCCEED (SOCIAL IMPACT)**

Select your relevant Succeed (Social Impact) performance indicators:

- Sustainably Housed [configure details ▶]
Number Of People Who Obtain And Maintain Safe, Stable Housing
- Improve Neighborhood Satisfaction, Quality Of Life
Number Of Residents Improve Satisfaction With The Quality Of Life In Neighborhood And Recommend To Live In The Neighborhood
- Houses Improved, Maintained
Number Of Houses Maintained Externally And Internally
- People Vote
Number Of People That Vote In Specified Elections
- Properties Improved, Restored
The Number Of Properties That Are Developed Into Green Space, Retail Space, Affordable Housing, Or Any Other Space That Provides Benefit To The Community.
- Become Homeowner
Number Of People Who Gain Ownership Of A Home

Logic Model Stages

1. PROGRAM DEVELOPMENT
2. REACH
3. LEARN
4. ACT
5. SUCCEED (SOCIAL IMPACT)

succeed in school, graduate on time, gain employment, achieve financial stability, gain health, safety, wellbeing, etc.

Indicators: Define Success

The screenshot shows a web browser window with the True Impact logo and navigation menu on the left. The main content area is titled 'Global Engagement' and shows a progress bar with 'REACHED' highlighted. Below this, the 'People Served' indicator is selected, with a description: 'Number Of Individuals Directly Served With Leadership Education And/Or Mentorship/Sponsorship Supports To Promote Leadership Or Career Development/Advancement.' The 'Success Criteria' is 'Number of Global Engagement participants enrolled in 2018'. The 'Step 1: Define reach' section is active, with a text input field containing the same success criteria. A 'Next Step' button is visible. Below the input field, there are checkboxes for 'Step 2: Quantify reach' and 'Step 3: Categorize measurement'. At the bottom, there are two error messages: 'An entry in the Current Forecast field is required.' and 'A measurement classification is required for this indicator.' A 'Help' button is located in the bottom right corner.

After indicator selection, customize them using the step-by-step wizard

1. Define success

Threshold / level of achievement

1. Forecast Impact
2. Categorize measurement
3. Upload backup
5. Describe measurement

Indicators: Forecast Impact

True Impact

Global Engagement

STAGE: Initial Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: North Way

REACHED (150) → LEARN → ACT → SUCCEED (SOCIAL IMPACT)

150 People Served
Number of Individuals Directly Served With Leadership Education And/Or Mentorship/Sponsorship Supports To Promote Leadership Or Career Development/Advancement.

Success Criteria: Number of Global Engagement participants enrolled in 2018

Step 1: Define reach [+ Show all indicator fields](#)

> Step 2: Quantify reach
How many beneficiaries do you forecast will be reached from [start date] to [end date]?

Current Forecast:

Next Step

Step 3: Categorize measurement

A measurement classification is required for this indicator.

[< Save & Back](#) [Save & Return to Dashboard](#) [Save & View Impact Receipt](#) [Save & Next >](#)

[Help](#)

After indicator selection, customize them using the step-by-step wizard

1. Define success

2. Forecast Impact

Number achieve level during reporting period

3. Categorize measurement

4. Upload backup

5. Describe measurement

Indicators: Categorize Measurement

After indicator selection, customize them using the step-by-step wizard

1. Define success
2. Forecast Impact
3. Categorize measurement
 - Directly Measured
 - Estimate
 - Guess
4. Upload backup
5. Describe measurement

- **Directly measured:** program results, including testing, monitoring, or reporting by the beneficiaries or program implementers, using subjective or objective evaluation criteria.
- **Estimate:** based on data from other, similar programs; indirect tracking of outcomes (e.g., government data); or the program's past results.
- **Guess:** based on experience, anecdotal results, or logical assumptions.

Indicators: Upload Backup

True Impact

Global Engagement

STAGE: Initial Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: North Way

REACHED (150) → LEARN → ACT → SUCCEED (SOCIAL IMPACT)

150 People Served
Number Of Individuals Directly Served With Leadership Education And/Or Mentorship/Sponsorship Supports To Promote Leadership Or Career Development/Advancement.

Success Criteria: Number of Global Engagement participants enrolled in 2018
How are you measuring this indicator (once the program is fully implemented): Tracked by participant sign-in, attendance lists, or usage logs

Step 1: Define reach [+ Show all indicator fields](#)

Step 2: Quantify reach

Step 3: Categorize measurement

Step 4: Upload backup
Please upload a copy of the tracking, testing, or survey tool that will be used to determine the number reached.

Add Files

Acceptable file types: **.doc, .docx, .odt, .pdf, .xls, .xlsx, .ods, .ppt, .pptx and .txt**

Next Step

Step 5: Describe process

Help

After indicator selection, customize them using the step-by-step wizard

1. Define success
2. Forecast Impact
3. Categorize measurement

4. Upload backup

Relevant measurement instruments, tools

5. Describe measurement

Indicators: Describe Measurement

The screenshot shows the True Impact web application interface. The browser address bar displays the URL: <https://ir.trueimpact.com/#/report-wizard/4923/outcomes/indicators/Reached/212157>. The page title is "Global Engagement" and the user is logged in as "North Way". The navigation menu on the left includes: Report Builder, DASHBOARD, OVERVIEW, INTERVENTION, BENEFICIARIES, OUTCOMES (with sub-items: Services, Relevant, Indicators, Documentation, Notes), BUDGET, CUSTOM QUESTIONS, IMPACT RECEIPT, and SUBMIT. The main content area shows a progress bar with "REACHED (150)" selected, followed by "LEARN", "ACT", and "SUCCEED (SOCIAL IMPACT)". The indicator being edited is "150 People Served", with a description: "Number Of Individuals Directly Served With Leadership Education And/Or Mentorship/Sponsorship Supports To Promote Leadership Or Career Development/Advancement." The success criteria are: "Number of Global Engagement participants enrolled in 2018". The measurement method is: "Tracked by participant sign-in, attendance lists, or usage logs". The source/assumptions are: "Enrollment tracked through internal HR system". The wizard steps are: Step 1: Define reach, Step 2: Quantify reach, Step 3: Categorize measurement, Step 4: Upload backup, and Step 5: Describe process. The current step, Step 5, includes a text input field with the text "Enrollment tracked through internal HR system" and a character count of "205 characters remaining". A "Help" button is visible in the bottom right corner.

After indicator selection, customize them using the step-by-step wizard

1. Define success
2. Forecast Impact
3. Categorize measurement
4. Upload backup
- 5. Describe measurement**
How data is collected

Upload Documentation, Notes

The screenshot shows the 'Upload Documentation' step in the True Impact report builder. The page title is 'Global Engagement (18)' and the program manager is 'North Way'. The status is 'Final Report' and 'Not Yet Submitted for Review'. The main heading is 'Upload documents that provide backup or context for your impact model (optional)'. There is a dashed box for 'Upload Document (or drag here)'. A warning message states: 'Although not required, consider uploading backup documentation for your impact model.' with a 'Dismiss/Not Relevant' link. At the bottom, there are four buttons: 'Save & Back', 'Save & Return to Dashboard', 'Save & View Impact Receipt', and 'Save & Next >'. The left sidebar shows the navigation menu with 'Documentation' highlighted under the 'OUTCOMES' section.

Optional opportunity to:

- Upload any relevant documents
- Add notes

The screenshot shows the 'Add Notes' step in the True Impact report builder. The main heading is 'Add notes that provide context for your impact model (optional)'. A tip icon suggests: 'Consider adding notes to explain significant variances from your initial forecasts'. Below is a table with two columns: 'Date' and 'Notes'. The first row has the date '17 Aug 2021' and an empty text area for notes. Below the table is an 'add note' button. A warning message states: 'Although not required, will an entry here add useful context to your impact model?' with a 'Dismiss/Not Relevant' link. At the bottom, there are three buttons: 'Save & Back', 'Save & Return to Dashboard', and 'Save & Next >'. The left sidebar shows the navigation menu with 'Notes' highlighted under the 'OUTCOMES' section.

Budget

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#report-wizard/4692/budget/direct-cost`. The page title is "Global Engagement ('18)". The user is logged in as "North Way". The page content includes a question: "What's the expected direct cost of implementing Global Engagement from Mar 1, 2018 to Mar 1, 2019?". Below the question are two instructions: "Enter total cost, not just how a particular investment is being allocated." and "Enter the market value of any in-kind contributions (goods or services, such as volunteerism, office space, pro bono support)". A table with three columns: "Line Items", "Current Forecast", and "Notes (contents of line item)". The table contains the following data:

Line Items	Current Forecast	Notes (contents of line item)
Direct Expenses	\$ 60,000	Program and services costs
Direct In-Kind	\$ 10,000	Monetized volunteer effort
TOTAL BUDGET	\$ 70,000	
ALL INVESTMENTS	\$ 10,000	

Below the table is a green checkmark icon and the text "Page entries are valid." At the bottom of the page are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A "Help" button is located in the bottom right corner.

Provide total summary budget for program *overall* (not just funded amount)

- direct (cash, in-kind)
- overhead (cash, in-kind)

Budget

- Report Builder -

- DASHBOARD
- OVERVIEW
- INTERVENTION
- BENEFICIARIES
- OUTCOMES
- BUDGET
 - Direct Cost
 - Indirect Cost
 - Documentation
 - Notes
- SUBMIT

[Return to Main Menu](#)

Upload documents that provide backup or context for your budget (optional)

Upload Document (or drag here)

Acceptable file types: .doc, .docx, .odt, .pdf, .xls, .xlsx, .ods, .ppt, .pptx and .txt

⚠ Although not required, consider uploading backup documentation for your budget. [Dismiss/Not Relevant](#)

Save & Back

Save & Return to Dashboard

Optional opportunity to provide:

- Backup documentation
- Notes

- Report Builder -

- DASHBOARD
- OVERVIEW
- INTERVENTION
- BENEFICIARIES
- OUTCOMES
- BUDGET
 - Direct Cost
 - Indirect Cost
 - Documentation
 - Notes
- SUBMIT

[Return to Main Menu](#)

Add notes that provide context for your budget (optional)

💡 Consider adding notes to explain significant variances from your initial forecasts

Date	Notes
17 Aug 2021	<input type="text"/>

+ add note

⚠ Although not required, will an entry here add useful context to your budget? [Dismiss/Not Relevant](#)

Save & Back

Save & Return to Dashboard

Save & Next >

Final Review

Global Engagement ('18)

STAGE: Final Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: North Way

- Overview
- Intervention
- Beneficiaries
- Outcomes
- Budget
- Custom Questions

Some data you have entered needs to be updated. It cannot be submitted as is. Check above to see what section has e...

- Green check = complete
- No check = info needed
- Yellow exclamation point = warning, edit or click Dismiss/Not Relevant
- Red X = error

Submit

Global Engagement ('18)

STAGE: Final Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: North Way

North Way

What's Left To Do

[Show dismissed warning alerts](#)

Overview	✓
Intervention	✓
Beneficiaries	✓
Outcomes	✓
Budget	✓

[Submit for Feedback](#) [Impact Receipt](#)

Submit button becomes active when all sections are complete

Help

- 01 Overview ✓ Date range covers annual funding period
- 02 Intervention ✓ Describe primary activities in Additional Information
- 03 Beneficiary ✓ Identify all beneficiaries relevant to your grant (*gender, racial/ethnic identity, and SES, if possible*)
- 04 Outcomes
 - RELEVANT ✓ Review program theory of change
 - REACH ✓ Participants
 - LEARN ✓ Learning
 - ACT ✓ Behavior Change
 - SUCCEED ✓ Positive social, economic, or environmental outcomes
- 05 Documentation ✓ Upload relevant data

Step 3

Updating Report

Feedback

Feedback has been provided for your report.  Inbox x

True Impact <noreply@trueimpact.com>
to smiller+demograntee ▾

8:27 AM

True Impact Report Feedback

Hi North,

The Network Expansion report has received feedback. Please log in to review the comments and make adjustments to your report profile as appropriate.

[Log in to My Account](#)

If you've forgotten your password (or if your user account was set up for your and you didn't receive the email), please click on the link below to reset your password.
https://ir.trueimpact.com/#/reset_login.



1. True Impact sends feedback on report
2. Update report, resolve feedback, and submit for True Impact verification

Review Feedback

The screenshot shows a web application interface for True Impact. The left sidebar contains navigation links: true impact, TO DO (with a notification badge for 14), REPORTS, REPORTS RATINGS, INVESTMENTS, ACCOUNT, HELP, and SIGN OUT. The main content area is divided into three sections: 'Funding Applications: 0' (with the message 'All applications have been accepted!'), 'Investments to be allocated: 0' (with the message 'All investments have been allocated!'), and 'Reports to be submitted or published: 9'. The 'Reports' section contains a table with the following data:

Program or Initiative Name / Funding Term	Status	Initial Content
1. Program Report (2018)	Final Report (TI Feedback Provided)	Overview (green check), Intervention (green check), Beneficiaries (green check), Outcomes (yellow warning), Budget (red X), Name (green check)
2. Program Report (2019)	Initial Report (Not Yet Submitted for Review)	Overview (green check), Intervention (green check), Beneficiaries (green check), Outcomes (green check), Budget (green check), Update (green button)
3. Program Report (2021)	Initial Report (Not Yet Submitted for Review)	Overview (white circle), Intervention (white circle), Beneficiaries (white circle), Outcomes (white circle), Budget (white circle), Update (green button)
4. 2020 Healthy Lifestyles Program Dec-31-2019 to Dec-31-2020	Initial Report (Not Yet Submitted for Review)	Overview (green check), Intervention (green check), Beneficiaries (green check), Outcomes (yellow warning), Budget (yellow warning), Update (green button), Help (dark button)

A callout box on the right side of the table states: 'Click on green Update button or orange comment icon to review feedback'. A 'Help' button is visible at the bottom right of the table.

Edit & Resolve Feedback

The screenshot displays the True Impact report wizard interface. The main content area shows a progress bar with 'SUCCEED (SOCIAL IMPACT) (2,189)' highlighted. Below this, a section titled '2,189 Acres Of Land Protected, Restored' provides details on success criteria and measurement steps. A feedback modal is open on the right, titled 'True Impact Feedback: Measurement Sources and Assumptions* - Social Impact'. The modal contains a 'RESOLVE' section with a checkbox and a text box for providing additional guidance. A callout box points to the checkbox with the text: 'Review feedback, make edits, and mark as Resolved by checking the box'. The modal also includes a 'Close' button and a 'Help' button.

Global Engagement ('18)

STAGE: Final Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: North Way

REACHED → LEARN → ACT → **SUCCEED (SOCIAL IMPACT) (2,189)**

2,189 Acres Of Land Protected, Restored
Total Amount Of Land (In Acres) That Achieve The Targeted Amount Of Improvement Or Protection As A Result Of This Program

Success Criteria: Acres under improved management or benefiting from restoration activities directly or indirectly on those lands.
How are you measuring this indicator (once the program is fully implemented): Other direct measurement of social impact [please describe in next step]

- Step 1: Define success (social impact) [+ Show all indicator fields](#)
- Step 2: Quantify success
- Step 3: Categorize measurement
- Step 4: Upload backup
Please upload a copy of the tracking, testing, or survey tool that will be used to determine the number that gain this level of achievement (social impact)
[+ Add Files](#)
[Next Step](#)
- Step 5: Describe process

A measurement description is required for this indicator.

True Impact Feedback: Measurement Sources and Assumptions* - Social Impact

RESOLVE:

*Please consider uploading a copy of the instruments or data sources used for generating these data.

Additional Guidance

Close

Help

Submit Updated Report

Global Engagement ('18)

STAGE: Final Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: North Way

North Way

What's Left To Do

[Show dismissed warning alerts](#)

Overview	✓
Intervention	✓
Beneficiaries	✓
Outcomes	✓
Budget	✓

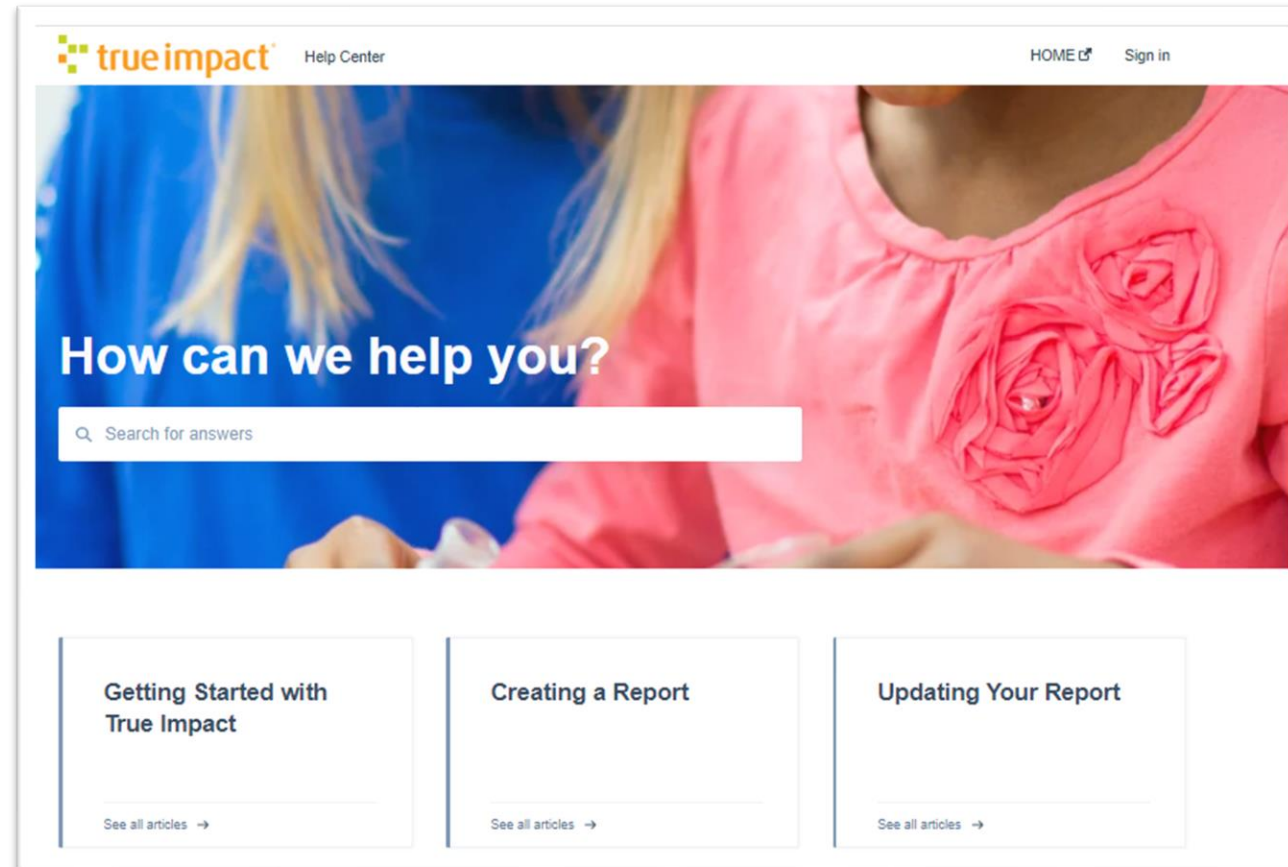
Return to Main Menu

Submit Impact Receipt

Submit updated report

Help

Resources



support.trueimpact.com

THANK YOU &
KEEP IN TOUCH

Sara Ansell

Manager, Client Success

Sadie Miller

Director, Client Success

Chelsea Takamine

Manager, Client Success

Contact

support@trueimpact.com