

10-MINUTE IMPACT ASSESSMENT

EXPLORE HOW TO MAKE THE MOST OF YOUR GIVING

We all want to have impact—or, in simpler terms, make a real difference. This desire often leads us to ask questions such as, How do we know we're actually making a difference? Could we be making a bigger difference? We want to have a bigger impact, but how do we get there?

If you are asking questions like these, this simple tool will give you a framework for discussing impact, help you identify areas of strength and opportunities for increasing your impact, and give you tips and resources to strengthen specific areas in your journey toward greater impact.

INSTRUCTIONS:

Respond to each statement below by  **NEVER, SOMEWHAT, or OFTEN.**

*Note: We use the term **key decision makers** for donors, board members, fund holders, and senior staff members that make decisions individually or collectively. We understand that key decision makers play different roles in the journey toward impact. For example, when asked if key decision makers “actively seek information on how they might have more impact,” you might respond **OFTEN** if the board directs the executive director to engage in this work. If key decision makers are divided, as they commonly are, you can either answer in the middle range, or take the assessment twice, once from each vantage point.*

*Note: Some funders have **divided their areas of giving and approach each area differently**. If this is the case for you, the assessment is likely to be most accurate if taken with a single funding area or way of funding in mind.*

Element I: Are we thinking about impact?

KEY DECISION MAKERS...	NEVER	SOMEWHAT	OFTEN
1. Speak openly about wanting to make a difference.	1	2	3
2. Ask questions like, What difference have we made?	1	2	3
3. Want to know specifically what grantees are achieving with funding.	1	2	3
4. Are interested in seeing data that show funding is leading to real impact over time.	1	2	3
5. Ask questions like, What are we really trying to achieve?	1	2	3

TOTAL

Element II: Are we focusing our impact?

KEY DECISION MAKERS...	NEVER	SOMEWHAT	OFTEN
1. Make grant decisions based on potential for impact.	1	2	3
2. Ask questions such as, Can we be doing more with the resources we have?	1	2	3
3. Actively seek information on how they might have more impact.	1	2	3
4. Realize they can't impact everything, but must make choices.	1	2	3
5. Focus their giving by field, population, or strategy.	1	2	3

TOTAL

Element III: Are we planning for impact?

KEY DECISION MAKERS...	NEVER	SOMEWHAT	OFTEN
1. Take time for deep learning about focus areas.	1	2	3
2. Specifically define what they want to achieve within a focus area.	1	2	3
3. Work closely with field experts (e.g., nonprofit and community leaders, funders) to understand ways to achieve desired impact.	1	2	3
4. Choose a set of strategies for making change in a particular focus area and implement them.	1	2	3
5. Align grants with desired impact.	1	2	3

TOTAL

Element IV: Are we learning about our impact?

KEY DECISION MAKERS...	NEVER	SOMEWHAT	OFTEN
1. Track key information to determine if strategies are having desired impact.	1	2	3
2. Develop trusting relationships with key grantees for increased openness, feedback, and learning.	1	2	3
3. Talk with grantees (without overburdening them) to understand what is and isn't working throughout the grant cycle.	1	2	3
4. Adapt strategies for making an impact as new learning occurs.	1	2	3
5. Share learning with grantees, the field, and other funders.	1	2	3

TOTAL

Element V: Are we amplifying our impact?

KEY DECISION MAKERS...	NEVER	SOMEWHAT	OFTEN
1. Apply to focus areas key resources beyond dollars, including influence, convening power, knowledge, and connections.	1	2	3
2. Try to build support for grantees by influencing other funders.	1	2	3
3. Work with grantees and other nonprofits to expand good programs or bring them to scale.	1	2	3
4. Work across other sectors (e.g., government, business, education) for community-wide change.	1	2	3
5. Engage in activities such as collaborations and advocacy to make a difference within a larger system or field.	1	2	3

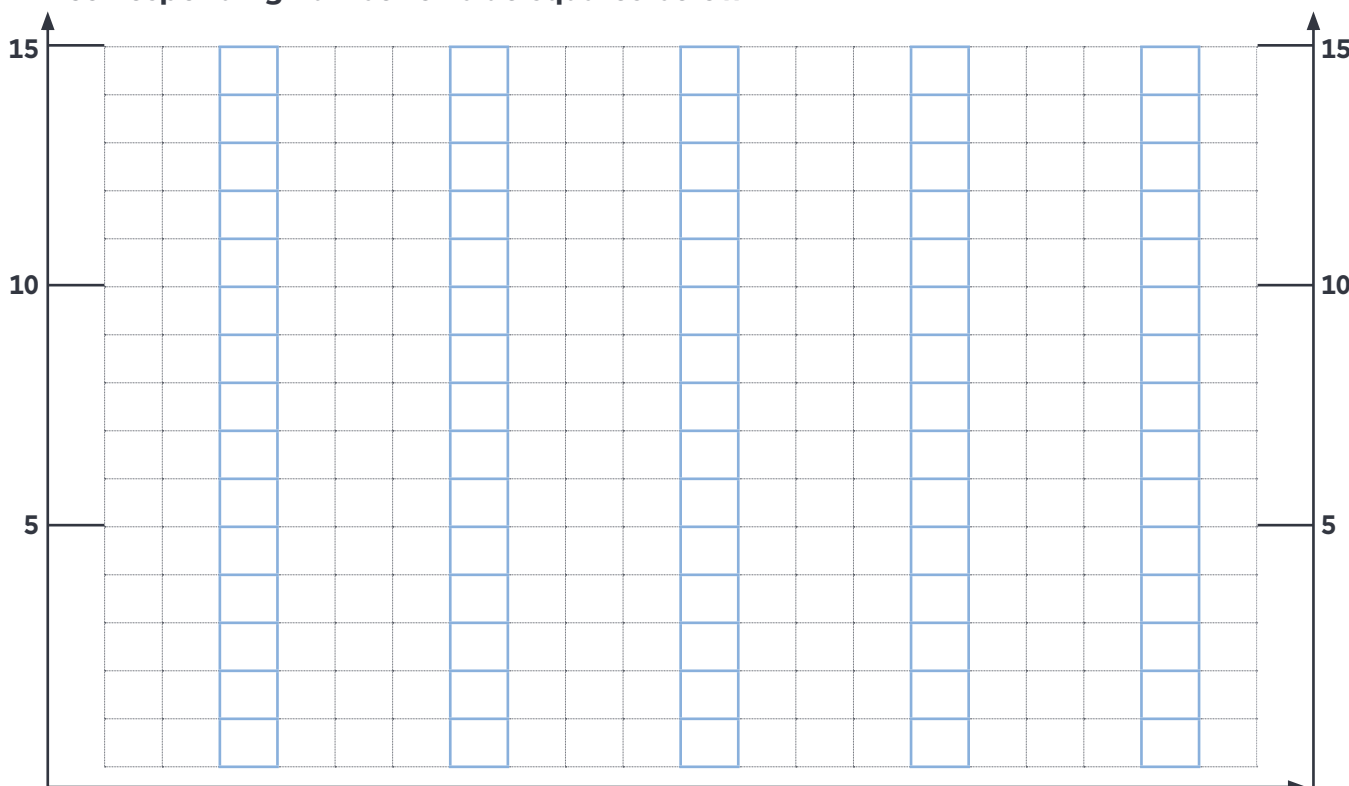
TOTAL

Tally your results for each element, and place your scores in the boxes below.
 (Scores will range between 5-15 for each element.)

PLACE SCORES HERE. →

Element I Score: _____	Element II Score: _____	Element III Score: _____	Element IV Score: _____	Element V Score: _____
Thinking about impact	Focusing your impact	Planning for impact	Learning about your impact	Amplifying your impact

Then, for a visual "bar graph" representation of your scores, shade the corresponding number of blue squares below.



Use this chart to understand your score for each element.

IF YOUR SCORE IS:	
5-8	This is new territory for you! Dig in by learning the concepts, getting inspired, building support, and initiating small steps toward greater impact before moving on to any other elements.
9-11	You're on your way to increasing your impact! You may make even greater strides if you can strengthen those areas that are weaker and build momentum before moving to other elements.
12-15	You're competent in this area and well-positioned to continue your journey toward greater impact by taking on greater challenges identified in other elements.

For resources related to each Element of Impact, and tips to focus your energy, read the companion **Impact Assessment Guide**.

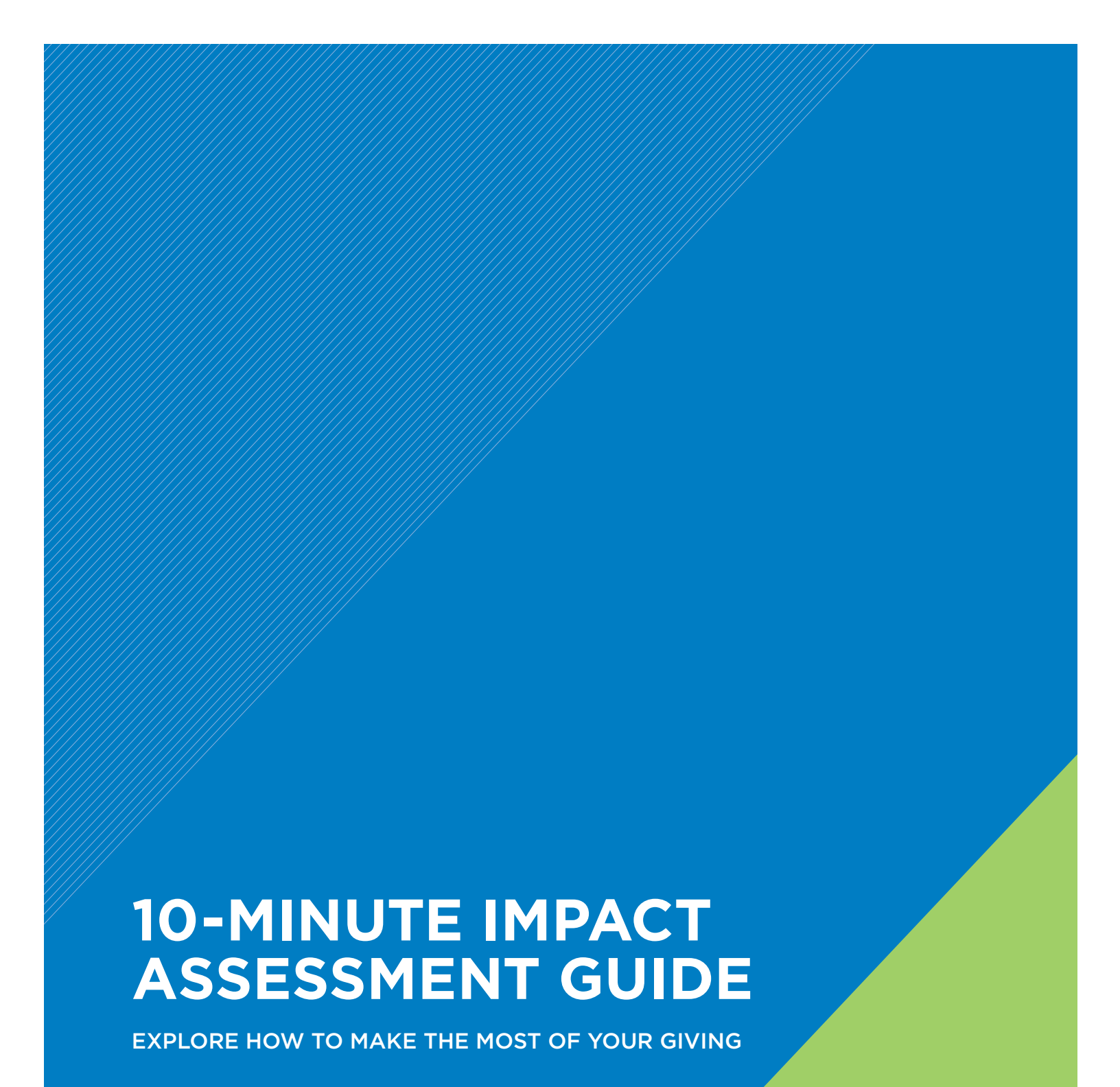
For funders interested in key decision makers' aggregate perspective, ask each decision maker to complete a separate survey, then place results in the table below. To calculate the group's average score for each element, divide the sum total in each column by the number of responses.

KEY DECISION MAKERS...	ELEMENT I SCORE	ELEMENT II SCORE	ELEMENT III SCORE	ELEMENT IV SCORE	ELEMENT V SCORE
#1					
#2					
#3					
#4					
#5					
#6					
#7					
#8					
#9					
#10					
	Sum Total: _____ ÷ # Responses: _____ = Average: _____	Sum Total: _____ ÷ # Responses: _____ = Average: _____	Sum Total: _____ ÷ # Responses: _____ = Average: _____	Sum Total: _____ ÷ # Responses: _____ = Average: _____	Sum Total: _____ ÷ # Responses: _____ = Average: _____

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10-MINUTE IMPACT ASSESSMENT GUIDE

EXPLORE HOW TO MAKE THE MOST OF YOUR GIVING

Impact Assessment Guide

Once you've completed the 10-Minute Impact Assessment, this guide will help direct you where to go next.

Increasing your impact may or may not be a linear process. Some funders will move quite intuitively from Thinking About Impact (referenced here as Element I) to Amplifying Your Impact (referenced here as Element V), while others will make progress on multiple elements at the same time. However you choose to move through this two-dimensional spectrum, the goal is to deliberately engage in practices that will help you increase your impact over time. Whether it takes months or decades, the journey will reward you with each step you take.

Find Your Starting Point

Based on your scores and a conversation with key decision makers, begin by focusing on a single element. To choose, consider:

- What is the most logical starting point?
- Is one element easy to address for a big increase in impact?
- Which elements are key decision makers ready to address?

If not immediately clear where to focus your energy, use the tips below as a guide. And keep in mind, there is really no wrong place to start. Any efforts toward impact are good ones.

Areas of strength: There is much to be learned by reflecting on your areas of strength. For example, if your board is strong in asking the questions identified in Element I, might you apply those same strengths in asking questions to Element II, asking questions to focus your giving?

The middle ground: If some elements scored in the middle range, consider why. Does it reflect a middle ground between polarized decision makers? If so, we encourage you to take time to align decision makers before moving forward. If decision makers are aligned, perhaps you want to start here nevertheless to strengthen these areas.

Opportunities for growth: Elements with low scores offer you great potential for increased impact. Many funders grow most by starting with the lowest scoring element, and the one that comes first on the I to V scale. For example, if impact is new to you and all scores are low, you may benefit by starting with Element I, then moving to Element II, and so on.

What's next? With your starting point in hand, use this guide for quick tips and inspirational stories to move you forward.

Element I: Thinking About Impact

Thinking about impact is the most important component of increasing your impact. A first step is the practice of asking simple but challenging questions about your impact.

Tips and Resources

Begin the Conversation

- Use the discussion guide [Why Every Foundation Can and Should Have Impact](#) to engage key decision makers
- Ask key decision makers:
What difference have we made?
What are we really trying to achieve? Are we satisfied with the impact we're having?

Deepen Your Knowledge

- Read the tear sheet [Impact Is Worth It](#) and the blog post [Want to Change the World? It's D+V+P](#)
- Read the discussion guide [Moving Board Members and Staff Members to Pursue Impact](#) and learn how to build buy-in with key decision makers
- Read the book [Give Smart: Philanthropy That Gets Results](#)

Connect and Get inspired

- Attend gatherings and conferences with other funders
- Invite other funders (further in their journey to impact) to share their insights with you
- Use the [Member Directory](#) or call Exponent Philanthropy to connect with members with relevant experience

A Journey to Increasing Impact

The Power of Simple Questions by Nan Pugh, Pugh Family Foundation

Thirteen years ago, my parents sold their telecommunications company and started a private foundation. Their earliest motivations were to avert taxes from the sale and safeguard my two brothers and me from inheriting wealth that would deter us from working for a living.

For the first 7 years, on December 27, we gathered for a family meeting, threw out a list of our favorite charities, and negotiated who would get \$20,000, who might only get \$15,000, and who might get nothing at all. It was all about our feelings, our intuition, and what we liked. Interestingly, over time, it became more difficult to find consensus. It became harder and harder for my father to give another \$20,000 when he had no idea if past grants had made any difference.

My father started asking questions like, What are we accomplishing? What is our impact? My response was, Of course, we're doing good. We're giving money to nonprofits we like. That was not convincing to my father, the engineer. He wanted to know we were having impact.

Ten years into the life of the foundation, we made some big changes. We developed a grant application process, made our first round of grants based on knowledge *and* passion, and even conducted site visits to see the results. Simultaneously, I attended an Exponent Philanthropy (then, ASF) conference and became convinced that we could be doing a whole lot more with our foundation; it all had to do with thinking a lot more like my dad when it came to impact. While we still have a bit of a shotgun approach by focusing broadly on education and generational poverty in the Acadiana area of Louisiana, we are consistently asking, Does this grant have potential for impact?

Here are some of our changes:

- **Our decisions are much more informed**, more logical, and not driven by emotions.
- **It's easier to make decisions.** We use a rubric to guide our decisions, using passion, potential impact, viability of the program, and overall fit in the foundation portfolio.
- **We're more fulfilled and motivated.** Our confidence in our impact leads us to give even more of ourselves. It's great to see my dad willingly spend 9 hours at a public school in a disadvantaged area because he knows it is making a difference.
- **Our grants are helping to support systems level change.** We are supporting the school district's vision through our grants and leadership, and, although we are only one piece of the puzzle, it's exciting to see the result of improved public schools.

Element II: Focusing Your Impact

Successful businesses focus, and foundations that focus will see positive results too. There are many ways to find a focus, no matter how diverse your decision makers may be.

Tips and Resources

Begin the Conversation

- Use the discussion guide [Why Defining a Focus Is Critical](#) with your board
- Ask questions in the grant review process: What impact will this grant have and is that what is most important to us? Do we know enough about this field to make educated decisions? Is it possible for us to be truly knowledgeable in all the areas we fund?
- Create a safe space (possibly facilitated by a disinterested party) to think about and discuss the idea of focusing your giving; if there is consensus on moving toward a focus, engage in a process to define a meaningful one

Deepen Your Knowledge

- Read the tear sheet [Focusing Your Giving: The Key to Impact](#)
- Dive into stories of how other funders found a focus: [The Power of Focus](#) and [Finding Focus, Honoring Values](#)

Connect and Get inspired

- Attend gatherings and conferences with other funders to hear the impact of focusing their giving
- Invite funders to meetings with key decision makers to share how they came to develop a focus
- Use the [Member Directory](#) or call Exponent Philanthropy to connect with members who have narrowed their focus

A Journey to Increasing Impact

Making the Shift by Celeste Land, Land Family Foundation

Our family foundation is very, very small. Last year, we gave away \$50,000 in grants, which is not enough money to solve any of the world's problems, especially since there's no one problem our family could all agree on. Nevertheless, we wanted to have impact and came to the conclusion that we needed to focus our giving so we could better assess our impact.

That led us to **focus on solving the operational problems of small-to mid-sized nonprofits**. Many of these organizations put all their limited resources into program expenses, leaving little or no money for essential operational expenses, unexpected budget shortfalls, or much needed community outreach projects. That's where we come in.

While most of their problems are well out of our price range, we have used **creative grantmaking strategies** to do the greatest possible good within our limited budget. For instance, we couldn't build a new library, but we *could* provide the funds to launch a capital campaign. We couldn't solve the funding challenges of a struggling public radio station, but we could help them raise additional money through a matching grant challenge. Most recently, we helped a small human services nonprofit stay in compliance with ADA regulations and retain its Americorps volunteers by funding a wheelchair ramp for its offices.

Not only do we see benefits for our nonprofit grantees, we also see these benefits for the board:

- By knowing our end goal, **we know where to look for impact and can actually see it.**
- Because we fund what most other foundations will not, **we are becoming more skilled at helping grantees think about opportunities for leverage.**

Certainly there are days when we dream of having more grant money and more resources, like a "proper" foundation. But we're making a difference, despite our very small size. And that's what counts.

Element III: Planning for Impact

Change is rarely achieved accidentally, especially in a field that tackles some of society's most complex challenges. Intentionally choosing a path based on knowledge and pursuing it over time is critical.

Tips and Resources

Begin the Conversation

- Use the discussion guides [Good Grantmaking Demands Field Knowledge](#) and [Finding Success Through a Clear Vision and Road Map](#) with your board
- Ask questions of key decision makers: What might get in the way of intentionally planning for impact and how can we move past these roadblocks? Do we have a focus that is clear and sufficiently narrow that we can become educated funders?

Deepen Your Knowledge

- Read the primer [Getting to Impact Through Planning](#)
- Review these sample [road maps](#)
- Read Paul Ylvisaker's [Small Can Be Effective](#)

Connect and Get inspired

- Take time to connect with nonprofits, other funders, community and business leaders, government officials, and researchers to learn more deeply about your focus area
- Attend an Exponent Philanthropy Getting to Impact Through Planning seminar with other decision makers
- Connect with [affinity groups](#) to learn more about your area of interest
- Use the [Member Directory](#) or call Exponent Philanthropy to connect with members who have designed their road map to impact

A Journey to Increasing Impact

Defining and Moving Toward Impact by Clark McCain, The Coleman Foundation

When Dorothy and J.D. Stetson Coleman founded The Coleman Foundation, they did not specify any particular focus. Over time, by considering the founders' philosophies and giving history as well as board members' interests, the foundation's focus emerged to include entrepreneurship education, cancer treatment, and developmental disabilities. Over the years, the staff made hundreds of grants to organizations that broadly advanced these fields and improved programs.

After 30 years of grantmaking, the board and staff wished to have a clearer understanding of the foundation's impact. Unfortunately, **we couldn't assess our specific impact because grantmaking goals were often very broad and lacked sufficient clarity.**

In late 2011, with board support, the staff embarked on a 6-week, focused effort to clarify our grantmaking goals and ultimately gain a better understanding of the foundation's intended impact. Employing Exponent Philanthropy's Getting to Impact Through Planning process, staff reviewed past grantmaking and scanned the needs in each field through discussions with grantees and others, resulting in **impact plans with articulated strategies and outcomes for each funding area.** In early 2012, the board approved the initial plans and we began using them to talk about our work and evaluate grant opportunities.

After a year and a half of using our plans, we are seeing these benefits:

- We can **articulate the foundation's grantmaking goals more clearly and consistently.**
- **Recent grantmaking has become more focused** within each of our three funding areas.
- **Board members are better able to assess grant recommendations and think strategically.**
- We are having **challenging and important conversations about total program impact** and potential changes to areas of funding with lesser impact.

Element IV: Learning About Your Impact

Funders who are serious about impact are serious about learning. A dogged determination to learn will allow you to identify your impact, and your learning will fuel it.

Tips and Resources

Begin the Conversation

- Use the discussion guides [Why Evaluation Is a Key Component in Increasing Your Impact](#), [What Evaluation Is and Isn't](#) and [Making Evaluation Manageable and Meaningful](#)
- Ask questions of key decision makers: Would we be more inspired in our grant-making if we knew the impact we were having? What's one thing we'd like to learn, and how might that lead to greater impact?

Deepen Your Knowledge

- Read the tear sheet [Using Evaluation to Become an Effective Learning Organization](#) and primer [Getting to Impact Through Evaluation](#)
- Experiment with evaluation by collecting information to answer a couple simple questions; see these [sample evaluation plans](#)
- Funders also can [build grantee evaluation capacity](#); evaluation capacity not only helps a grantee be more effective in its work, it also helps the organization to communicate its impact more effectively to other potential funders, ultimately leveraging more dollars

Connect and Get Inspired

- Strive to establish trusting relationships with grantees and other funders that encourage honest communication and promote a perspective that learning and adjustments are expected throughout a project
- Find ways to incent nonprofits and funders to share their learning with one another
- Publicize your learning to other funders, your grantees, and the larger field
- Attend an Exponent Philanthropy [Getting to Impact Through Evaluation](#) seminar with other decision makers
- Use the [Member Directory](#) or call Exponent Philanthropy to connect with members who are actively learning about their impact

A Journey to Increasing Impact

A Focus on Learning by Janis Reischmann, Hau'oli Mau Loa Foundation

When I joined Hau'oli Mau Loa Foundation in 2008, I came with 15 years of experience working in the field with both a community foundation and a number of private foundations. That experience, together with input the board and I gathered from talking with a number of community leaders, convinced me and our board that our impact would increase if we focused our giving, set some goals, and then clearly communicated those goals to others in the field.

The board and I also realized that we could leverage our grants by promoting our and our grantee partners' learning. I knew knowledge was a powerful tool, but **I didn't realize how much our quest to learn about our impact would influence our organization and the work we do with our grant partners.**

A learning mindset makes it possible for our ears to be attuned to input. Because we strive to approach everything as an opportunity for new insights, different approaches, and helpful tips, we have made many improvements in the way we do our work. From the simplest—asking what we could do better after every event with groups of grantee partners—to developing an evaluation framework grounded in learning, we are routinely getting input that informs our work. From our first grant partner satisfaction survey, we learned that we needed to do a better job of understanding the communities that our grant partners are working in. That has promoted us to do more site visits and to ask better questions about community conditions.

I believe our grant partners are more open about their learning, in part because we are more open about ours. They call with stories of success, of course, but we also get regular calls when there are problems. For example, a group of four organizations that are working in a similar field with similar types of young people have asked us to convene a discussion for them on lessons learned from failures. Two of the groups have volunteered to kick off the discussion and model the value of talking about what hasn't worked.

An atmosphere of openness to learning promotes essential dialogue among our grant partners in so many ways. For example, through regular review of partner work plans, we noticed that three of them were planning to revise their internship programs over the next year. We asked if they'd like to come together to share their experiences, and, after the first session, they planned to do it again because it was so valuable.

Element V: Amplifying Your Impact

Funders who use their reputations, convening power, knowledge, connections, and creativity are perfectly positioned to amplify their impact year after year.

Tips and Resources

Begin the Conversation

- Use the primer [Twenty Ways to Make a Difference](#) and article [Leadership for a Changing World](#) to facilitate discussions among decision makers
- Ask questions of key decision makers: What change could occur if we really made an effort to amplify our impact? Are we using all the assets at our disposal to have an impact, or could we do more?

Deepen Your Knowledge

- Consider all the resources at your disposal; see [survey data](#) on how funders are using non-grant strategies to increase their impact
- Engage beyond your grantees and like-minded funders for greater impact; see [Engaging the Unusual Suspects](#)
- Dig into publications on each of these strategies: advocacy, collaboration, networks, collective impact
- See [Scaling What Works](#) for more on funding the spread of effective programs, solutions, and policies

Connect and Get inspired

- Find out more about [Exponent Philanthropy's Leadership Initiative](#) and the many funders who are changing their communities through innovative strategies that lead to greater impact
- Invite funders who have amplified their impact to share their stories with key decision makers
- Use the [Member Directory](#) or call Exponent Philanthropy to connect with members who amplify their impact through collaboration, advocacy, and more

A Journey to Increasing Impact

Bigger Change Is Possible by Emily Tow Jackson, Tow Foundation, CT

Our family's foundation started in the 1990s as a typical foundation with several giving interests, most of which fell into the areas of disadvantaged youth and families. In 1999, a series of news articles brought attention to the fact that Connecticut had one of the worst juvenile justice systems in the country. We decided at that time that something must be done. But, having no idea what that would be, we gave ourselves a year to focus on learning about the juvenile justice system. We knew we were taking some risks engaging in such a huge, broken system, but **the family's wealth was built by taking risks and constantly learning. Why shouldn't we employ those skills in our grantmaking?**

Over the course of that year, it became clear that we would have to employ strategies that would spur change in the public sector if the juvenile justice system were to significantly improve. Our connections to advocates moved organically from casual meetings to a partnership and ultimately to a collaboration called The Connecticut Juvenile Justice Alliance (CTJJA).

It's been quite a journey with huge contributions from untold numbers of people as well as the Alliance, but, in the past 15 years, Connecticut's juvenile justice system has gone from being one of the worst to being a model for states around the country. Just to list a few victories, 16-year-olds are no longer tried in the adult justice system; services are provided that help the most vulnerable stay out of trouble; and conditions have improved in juvenile facilities. But, among the greatest achievements is this: Connecticut has improved public safety and spends less money to get it.

Our thanks to The Coleman Foundation for its ingenuity and financial support in developing the 10-Minute Impact Assessment Tool and Guide. Many thanks also to members of Exponent Philanthropy's Impact Working Group for assistance with content and design.
