### Impact Management for Everyone

Select the pathway that matches your mandate for impact management **

<table>
<thead>
<tr>
<th>Stages of Common Impact Management Journey *</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Clarify intentions</strong></td>
</tr>
<tr>
<td>2. <strong>Select approach</strong></td>
</tr>
<tr>
<td>3. <strong>Set targets</strong></td>
</tr>
<tr>
<td>4. <strong>Do assessment</strong></td>
</tr>
<tr>
<td>5. <strong>Analyze data</strong></td>
</tr>
<tr>
<td>6. <strong>Report findings</strong></td>
</tr>
<tr>
<td>7. <strong>Take action</strong></td>
</tr>
</tbody>
</table>

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#### 1. Clarify intentions

- **3.01 - Identify benchmarks.**
  - Describe what happens by referencing outcomes (final or intermediate) to primary theories based on general theory.

#### 2. Select approach

- **2.01 - Select principles that need to be adhered to.**
  - Select principles that need to be adhered to.

#### 3. Set targets

- **3.01 - Identify benchmarks.**
  - Describe what happens by referencing outcomes (final or intermediate) to primary theories based on general theory.

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#### 4. Do assessment

- **4.01 - Identify measurement (techniques, methodologies).**
  - Specify frequency, duration, and timing of measurement.

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#### 5. Analyze data

- **5.01 - Identify secondary stakeholders.**
  - Identify secondary stakeholders.

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#### 6. Report findings

- **6.01 - Identify options for optimizing measurement (techniques, methodologies).**
  - Identify options for optimizing measurement (techniques, methodologies).

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#### 7. Take action

- **7.01 - Results form part of primary outcomes/ activities that are measured.**
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*Engage* Iiks

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<tr>
<th>Agnostic</th>
<th>Avoid harm</th>
<th>Want good</th>
<th>Get facts</th>
<th>Explain why</th>
<th>Assess effects</th>
<th>Interpret meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not consider impact</td>
<td>Avoid harm activities that you think will cause harm</td>
<td>Now patients to identify and select activities that you think will do good</td>
<td>Describe what happens by enumerating outputs (goals) or outcomes (primary) based upon general theory</td>
<td>Explain why outputs and/or outcomes happen based upon specific inputs and actions</td>
<td>Assess the intended effects of actions on stakeholders</td>
<td>Interpret the intended or negative outcomes, both intended and/or unintended, and assess changes over time</td>
</tr>
</tbody>
</table>

### Mapping to tools & techniques (not exhaustive)

Note:
The table below shows which tools and techniques are suitable for different pathways and therefore when they should be used - however, it may be more useful to think of it as a guide for which tools and techniques may not be suitable for use because their functionality is too advanced or sophisticated for that pathway. The size of the tick infers the relevance of the tool/ technique to the pathway.

<table>
<thead>
<tr>
<th><strong>Exclusion criteria</strong></th>
<th><strong>Inclusion criteria</strong></th>
<th><strong>Principles (norms)</strong></th>
<th><strong>Labels &amp; certifications (binary pass-fail)</strong></th>
<th><strong>Ratings &amp; indices (absolute score/ relative ranking)</strong></th>
<th><strong>Track KPIs against targets (outputs/ primary impact)</strong></th>
<th><strong>Theory of causation</strong></th>
<th><strong>Stakeholder engagement</strong></th>
<th><strong>Deep analysis</strong></th>
<th><strong>Pecuniary valuation/ monetisation of impact</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Negative screening</td>
<td>✓ ✓ ✓ ✓ ✓ ✓</td>
<td>UN Principles for Responsible Investment (PRI)</td>
<td>Fair Trade</td>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Sustainable Development Goals (SDGs)</td>
<td>Theory of change/ logic models</td>
<td>Structure processes</td>
<td>Social Return on Investment (SROI) - without pecuniary evaluation (monetisation)</td>
<td>Taxes (carbon, sugar, etc)</td>
</tr>
<tr>
<td>Inclusion criteria</td>
<td>Positive screening &amp; activity filters</td>
<td>UNEP FI Principles for Positive Impact Finance</td>
<td>Forest Stewardship Council (FSC)</td>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Global Reporting Initiative (GRI)</td>
<td>Counterfactual analysis</td>
<td>Surveys or questionnaires</td>
<td>✓ ✓ ✓ ✓ ✓</td>
<td></td>
</tr>
<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Etc</td>
<td>Etc</td>
<td>Etc</td>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Etc</td>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Randomised control trials (RCTs)</td>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Social Impact Bonds (SIB)</td>
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**Note:**
The original rubric was published by UNSIF, with thanks to the following for their valuable contributions and comments: New Philanthropy Capital, Oxford University Saïd School, PHINEO, Possibilian Ventures, Social Value International, UNPRI Standards, Social Performance Task Force. The table below shows which tools and techniques are suitable for different pathways and therefore when they should be used - however, it may be more useful to think of it as a guide for which tools and techniques may not be suitable for use because their functionality is too advanced or sophisticated for that pathway. The size of the tick infers the relevance of the tool/ technique to the pathway.

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B) Do no evil harm

C) Act to create good

D) Do good harm

E) Not applicable

G) Policy and practice

Interpreted meaning

Impact Management Project (IMP)

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