

Updating your Social Impact Report

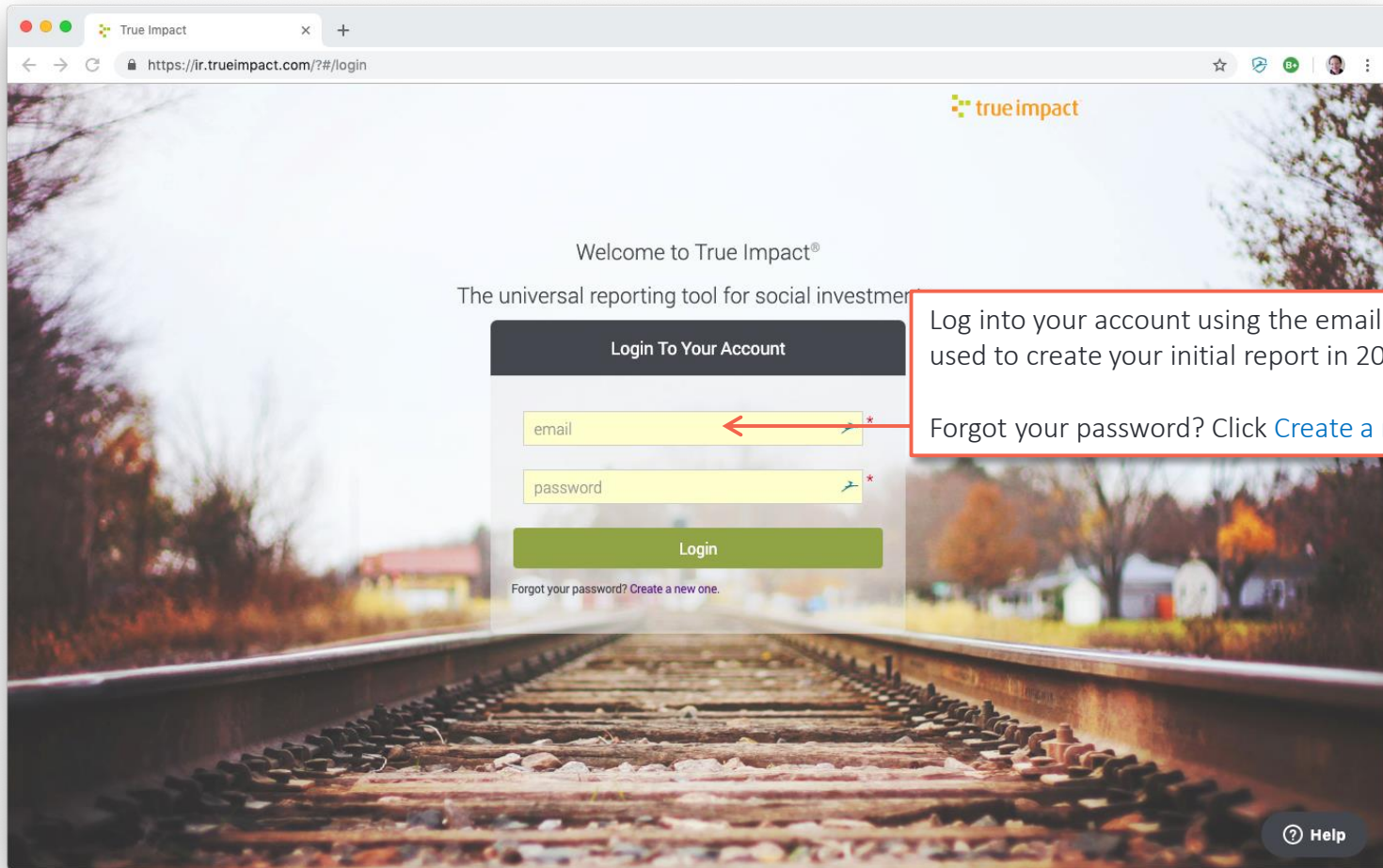
Social Impact reporting process

January 9, 2020

Finalizing Report Contents

Update as needed	Overview	Name, description, start/end date of report, logo, and report stage
	Intervention	Social category, type of intervention, frequency and duration of engagement, and description
	Beneficiaries	Location, demographic categories (%), description
Update with actuals	Outcomes	Logic model template, relevant indicators, indicator customization, backup documentation
	Budget	Direct (cash, in-kind) and overhead (cash, in-kind), backup documentation, notes
Populate Narratives	Narrative	Success stories, lessons learned

Log into your existing account



To Do List: Reports to be finalized

Your Initial report shows up in this section

The screenshot shows a web browser window with the True Impact dashboard. The main heading is 'Reports to be finalized (upon program completion): 6'. Below this is a table with three columns: 'Program or Initiative Name / Funding Term', 'Status', and 'Initial Content'. The 'Initial Content' column contains a grid of icons for 'Overview', 'Intervention', 'Beneficiaries', 'Outcomes', and 'Budget'. A red box highlights the 'Initial Content' section, and a red arrow points from it to the 'Initial Report (Published)' status of the '2. TutorMate' program. A 'Help' button is visible in the bottom right corner.

Program or Initiative Name / Funding Term	Status	Initial Content
1. Summer Learning Gain Initiative May-31-2014 to May-29-2015	Final Report (Published)	Overview ✓, Intervention ✓, Beneficiaries ✓, Outcomes ✓, Budget ⚠, Narratives ✓, Update ✓
2. TutorMate Aug-01-2018 to Jul-01-2019	Initial Report (Published)	Overview ✓, Intervention ✓, Beneficiaries ✓, Outcomes ✓, Budget ✓, Update ✓
3. Digital Bootcamp Feb-01-2019 to Jan-31-2020	Initial Report (Published)	Overview ✓, Intervention ✓, Beneficiaries ✓, Outcomes ✓, Budget ✓, Update ✓
4. 2019 Healthy Lifestyles Program Jan-01-2019 to Jan-01-2020	Initial Report (Published)	Overview ✓, Intervention ✓, Beneficiaries ✓, Outcomes ✓, Budget ✓, Update ✓
5. Play Works Jan-01-2018 to Dec-30-2018	Final Report (Published)	Overview ✓, Intervention ✓, Beneficiaries ✓, Outcomes ✗, Budget ✓, Narratives ✓, Update ✓
6. Sample Urban Farming Program Jul-01-2018 to Jul-01-2019	Final Report (Published)	Overview ✓, Intervention ✓, Beneficiaries ✓, Outcomes ✓, Budget ✓, Narratives ✓, Update ✓

Report Builder: Overview

The screenshot displays the True Impact Report Builder interface for a report titled "2019 Healthy Lifestyles Program ('19 - '19)". The page header shows the program name, stage ("Final Report"), status ("Published"), and program manager ("North Way"). A sidebar on the left lists various report sections: DASHBOARD, OVERVIEW (Name, Description, Date Range, Logo, Stage), INTERVENTION, BENEFICIARIES, OUTCOMES, BUDGET, NARRATIVES, IMPACT RECEIPT, and SUBMIT. The main content area asks "What is the current stage of this report?" and presents three options: "Initial Forecast", "Interim Report", and "Final Report". The "Final Report" option is highlighted with an orange border and a star icon. Below the options, a text box contains the description: "Final Report (i.e., the funded program has been completed)". A green checkmark indicates "Page entries are valid." At the bottom, there are four buttons: "< Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A red callout box points to the "Final Report" option with the text "Select current report stage: Final Report". A "More Info" button is visible on the right side of the main content area, and a "Help" button is in the bottom right corner.

Report Builder: Outcomes – Update Indicators

The screenshot displays the True Impact Report Builder interface for the '2019 Healthy Lifestyles Program ('19 - '19)'. The breadcrumb trail is: REACHED (500) → LEARN (500) → ACT (330) → SUCCEED (SOCIAL IMPACT) (165). The current indicator is '500 People Reached', defined as the 'Number Of People That Participate In, Or Are Directly Served By, The Program.' The success criteria state: 'Beneficiary will need to complete a nutrition health goal to be considered reached as well as complete required free health screening appointments.' The measurement method is: 'Tracked by participant sign-in, attendance lists, or usage logs.' The source description is: 'We will be utilizing our Electronic Medical Records (EMR system), currently EPIC.' A list of steps includes: Step 1: Define reach, Step 2: Quantify reach, Step 3: Categorize measurement, Step 4: Upload backup, and Step 5: Describe process. A red box highlights the 'Success Criteria' section with the text 'Update success definition'. A green message at the bottom indicates 'Page entries are valid.' Navigation buttons include 'Save & Back', 'Save & Return to Dashboard', 'Save & View Impact Receipt', 'Save & Next >', and a 'Help' button.

Report Builder: Outcomes – Update Indicator Descriptions

True Impact

https://ir.trueimpact.com/?#/report-wizard/4404/outcomes/indicators/Reached/203521

2019 Healthy Lifestyles Program ('19 - '19)

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

North Way

Report Builder

DASHBOARD

OVERVIEW ✓

INTERVENTION ✓

BENEFICIARIES ✓

OUTCOMES

Services ✓

Relevant ✓

Indicators >

Documentation ✓

Notes ✓

BUDGET ✓

NARRATIVES ✓

IMPACT RECEIPT

SUBMIT

Return to Main Menu

REACHED (500) → LEARN (500) → ACT (330) → SUCCEED (SOCIAL IMPACT) (165)

500 People Reached

Number Of People That Participate In, Or Are Directly Served By, The Program.

Success Criteria: Beneficiary will need to complete a nutrition health goal to be considered reached as well as complete required free health screening appointments.

How are you measuring this indicator (once the program is fully implemented): Tracked by participant sign-in, attendance lists, or usage logs

Please describe your sources/assumptions: We will be utilizing our Electronic Medical Records (EMR system), currently EPIC.

+ Show all indicator fields

Step 1: Define reach
How or how much did a beneficiary have to participate in or be served by 2019 Healthy Lifestyles Program to be considered "reached"?

Beneficiary will need to complete a nutrition health goal to be considered reached as well as complete required free health screening appointments.

103 characters remaining.

Step 2: Quantify reach

Step 3: Categorize measurement

Step 4: Upload backup

Step 5: Describe process

Help

Update success definition
Review threshold / level of achievement

Report Builder: Outcomes – Update Indicator Actuals

True Impact

https://ir.trueimpact.com/?#/report-wizard/4404/outcomes/indicators/Reached/203521

2019 Healthy Lifestyles Program ('19 - '19)

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

North Way

Report Builder

DASHBOARD

OVERVIEW

INTERVENTION

BENEFICIARIES

OUTCOMES

Services

Relevant

Indicators

Documentation

Notes

BUDGET

NARRATIVES

IMPACT RECEIPT

SUBMIT

Return to Main Menu

REACHED (500) → LEARN (500) → ACT (330) → SUCCEED (SOCIAL IMPACT) (165)

500 People Reached

Number Of People That Participate In, Or Are Directly Served By, The Program.

Success Criteria: Beneficiary will need to complete a nutrition health goal to be considered reached as well as complete required free health screening appointments.

How are you measuring this indicator (once the program is fully implemented): Tracked by participant sign-in, attendance lists, or usage logs

Please describe your sources/assumptions: We will be utilizing our Electronic Medical Records (EMR system), currently EPIC.

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

> Step 2: Quantify reach

How many beneficiaries were reached from Jan 1, 2019 to Dec 31, 2019?

Current Forecast: Initial Forecast:

Step 3: Categorize measurement

Step 4. Upload backup

Step 5. Describe process

Page entries are valid.

Help

Update current forecast
Add actual number that achieve level of success during reporting period

Report Builder: Outcomes – Update measurement

True Impact

https://ir.trueimpact.com/?#/report-wizard/4404/outcomes/indicators/Reached/203521

2019 Healthy Lifestyles Program ('19 - '19)

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

North Way

Report Builder

DASHBOARD

OVERVIEW ✓

INTERVENTION ✓

BENEFICIARIES ✓

OUTCOMES

- Services ✓
- Relevant ✓
- Indicators >
- Documentation ✓
- Notes ✓

BUDGET ✓

NARRATIVES ✓

IMPACT RECEIPT

SUBMIT

Return to Main Menu

REACHED (500) → LEARN (500) → ACT (330) → SUCCEED (SOCIAL IMPACT) (165)

500 People Reached

Number Of People That Participate In, Or Are Directly Served By, The Program.

Success Criteria: Beneficiary will need to complete a nutrition health goal to be considered reached as well as complete required free health screening appointments.

How are you measuring this indicator (once the program is fully implemented): Tracked by participant sign-in, attendance lists, or usage logs

Please describe your sources/assumptions: We will be utilizing our Electronic Medical Records (EMR system), currently EPIC.

Step 1: Define reach Show all indicator fields

.....

Step 2: Quantify reach

.....

> Step 3: Categorize measurement
How did you determine the number reached?

Tracked by participant sign-in, attendance lists, or usage logs

Change

.....

Step 4. Upload backup

.....

Step 5. Describe process

Help

Update measurement category, if needed

Report Builder: Outcomes – Update backup

True Impact

https://ir.trueimpact.com/?#/report-wizard/4404/outcomes/indicators/Reached/203521

2019 Healthy Lifestyles Program ('19 - '19)

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

North Way

Report Builder

DASHBOARD

OVERVIEW ✓

INTERVENTION ✓

BENEFICIARIES ✓

OUTCOMES

- Services ✓
- Relevant ✓
- Indicators >
- Documentation ✓
- Notes ✓

BUDGET ✓

NARRATIVES ✓

IMPACT RECEIPT

SUBMIT

Return to Main Menu

REACHED (500) → LEARN (500) → ACT (330) → SUCCEED (SOCIAL IMPACT) (165)

500 People Reached

Number Of People That Participate In, Or Are Directly Served By, The Program.

Success Criteria: Beneficiary will need to complete a nutrition health goal to be considered reached as well as complete required free health screening appointments.

How are you measuring this indicator (once the program is fully implemented): Tracked by participant sign-in, attendance lists, or usage logs

Please describe your sources/assumptions: We will be utilizing our Electronic Medical Records (EMR system), currently EPIC.

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 used to determine the number reached.

+ Add Files

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

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

.....

Step 5: Describe process

Info

Upload measurement instruments, if needed

Help

Report Builder: Outcomes – Indicator Measurement

The screenshot displays the True Impact Report Builder interface for a 2019 Healthy Lifestyles Program. The breadcrumb trail shows: REACHED (500) → LEARN (500) → ACT (330) → SUCCEED (SOCIAL IMPACT) (165). The current indicator is '500 People Reached', with a sub-description: 'Number Of People That Participate In, Or Are Directly Served By, The Program.' The success criteria state: 'Beneficiary will need to complete a nutrition health goal to be considered reached as well as complete required free health screening appointments.' The measurement method is: 'Tracked by participant sign-in, attendance lists, or usage logs.' The source/assumptions are: 'We will be utilizing our Electronic Medical Records (EMR system).' The measurement process is broken down into five steps: 1. Define reach, 2. Quantify reach, 3. Categorize measurement, 4. Upload backup, and 5. Describe process. Step 5 is currently active, with a text box containing the same source/assumptions text. A red callout box with the text 'Update measurement description, if needed' points to this text box. The interface also includes a sidebar with navigation options like Dashboard, Overview, Intervention, Beneficiaries, Outcomes, Budget, Narratives, Impact Receipt, and Submit. A 'Help' button is visible in the bottom right corner.

Report Builder: Budget

2019 Healthy Lifestyles Program ('19 - '19)
 STAGE: Final Report STATUS: Published PROGRAM MANAGER: North Way

What's the expected direct cost of implementing 2019 Healthy Lifestyles Program from Jan 1, 2019 to Dec 31, 2019?

- Enter total cost, not just how a particular investment is being allocated.
- Enter the market value of any in-kind contributions (goods or services, such as volunteerism, office space, pro bono support).

Line Items	Initial Forecast	Current Forecast	Notes (contents of line item)
Direct Expenses	\$50,000	\$ 50,000	Coach and staff compensation
Direct In-Kind		\$ --	Enter notes for this expense category here.
TOTAL BUDGET	\$51,000	\$ 51,000	
ALL INVESTMENTS		\$ 15,010	

Add current forecast of total summary budget for program overall

List of Current Investments

You can update the investment allocation tiers below.

Funder	Portfolio	Investment	Tier
	Healthy Eating, Active Lifestyles, and Healthy Environment	\$10,000.00	Foundational

Report Builder: Narratives – Lessons Learned

2019 Healthy Lifestyles Program ('19 - '19)
STAGE: Final Report STATUS: Published PROGRAM MANAGER: North Way

What lessons can you share from this specific Jan 1, 2019-Dec 31, 2019 reporting term?

💡 What do you wish you had done differently?
💡 What tips would you give to others thinking about implementing a similar program?

If we could implement this program over again from the beginning, we would...

250 words remaining.

✖ A lesson learned entry is required.

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

Help

Add Lessons Learned

- *What do you wish you had done differently?*
- *What tips would you give to others thinking about implementing a similar program?*

Report Builder: Narratives – Success Story

The screenshot shows a web browser window with the URL <https://ir.trueimpact.com/?#/report-wizard/4404/narratives/success-story>. The page title is "2019 Healthy Lifestyles Program ('19 - '19)". The status is "Published" and the program manager is "North Way".

The main heading asks: "What success stories can you share from this specific Jan 1, 2019- Dec 31, 2019 reporting term?". Below this is a sub-heading: "What stories best illustrate the value your program is generating?".

A text input field contains the text: "One of our greatest successes was when...". Below the field, it says "250 words remaining." and a red error message: "An entry is required in the success story field.".

At the bottom of the form are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >".

A sidebar on the left lists navigation options: Dashboard, Overview, Intervention, Beneficiaries, Outcomes, Budget, Narratives (Lesson Learned, Success Story, Success Photo), Impact Receipt, and Submit. A "Return to Main Menu" link is at the bottom of the sidebar.

A "Help" button is located in the bottom right corner of the page.

A red-bordered callout box on the right contains the text: "Add Success Story" followed by a bullet point: "What stories best illustrate the value your program is generating?".

Report Builder: Impact Receipt

The screenshot displays the True Impact Report Builder interface. The browser address bar shows the URL: <https://ir.trueimpact.com/?#/report-wizard/4404/impact-receipt/document/4070>. The page title is "2019 Healthy Lifestyles Program ('19 - '19)". The status is "Published" and the program manager is "North Way".

The left sidebar contains a navigation menu with the following items: Report Builder, DASHBOARD, OVERVIEW (checked), INTERVENTION (checked), BENEFICIARIES (checked), OUTCOMES (checked), BUDGET (checked), NARRATIVES (checked), **IMPACT RECEIPT** (highlighted with a red arrow), and SUBMIT. A "Return to Main Menu" link is also present.

The main content area is titled "2019 Healthy Lifestyles Program" and includes the following information:

- STAGE: Final Report | STATUS: Published | PROGRAM MANAGER: North Way
- Overview | Impact Model | Narrative | Finances
- Of the donors supporting this program, display Impact Receipt for:
- 2019 Healthy Lifestyles Program**
- Impact Receipt® for... Blue Cross Blue Shield of Massachusetts
- Investment: \$10,000.00
- Report Stage: Final
- Last Updated: 06 Aug 2019
- (1 of 3 investments funding this program from \$15,010.00 total)
- A free 1 year health program offered to Kent County residents who are 18 years and older. The goal of Healthy Lifestyles is to prevent and reduce cardiovascular disease and diabetes diagnosis of communities of color by providing health screenings, care management with a registered nurse and access to healthy lifestyle education.
- Location: Kent County, MI, USA
- Content updates:
- Timeline: Jan 1, 2019 Program start to Dec 31, 2019 Program end
- Summary Table:

Portion Funded 20% <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...) 165 beneficiaries protect, improve health
--	--	--

A red box at the top right contains the text "Review Impact Receipt and Submit", with a red arrow pointing to the "IMPACT RECEIPT" menu item in the sidebar.

Help

Report Builder: Final Review

The screenshot shows a web browser window with the True Impact logo and a navigation menu on the left. The main content area is titled "2019 Healthy Lifestyles Program ('19 - '19)" and displays a "What's Left To Do" checklist. All items in the checklist are marked with green checkmarks, indicating they are complete. At the bottom of the checklist, there are two buttons: "Finalize" and "Impact Receipt". A "Help" button is located in the bottom right corner.

True Impact

2019 Healthy Lifestyles Program ('19 - '19)

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

North Way

Report Builder

DASHBOARD

OVERVIEW ✓

INTERVENTION ✓

BENEFICIARIES ✓

OUTCOMES ✓

BUDGET ✓

NARRATIVES ✓

IMPACT RECEIPT

SUBMIT >

Return to Main Menu

What's Left To Do [Show dismissed warning alerts](#)

Overview	✓
Intervention	✓
Beneficiaries	✓
Outcomes	✓
Budget	✓
Narratives	✓

Finalize Impact Receipt

Help

Thank you!

Questions? You can reach out support@trueimpact.com to reach the full team or the True Impact staff member you've been working with most closely.