

# INVESTABLE IMPACT TOOLKIT



## *Basics for enterprises to begin identifying, tracking, and articulating impact*

The future of Greater Philadelphia (and the world) relies on investment in the entrepreneurs and enterprises creating solutions to our greatest challenges. This toolkit was created to assist you in establishing a foundation for and common language around identifying, tracking, and articulating your initiative or enterprise's positive impact.



## WHY?

### Advance your enterprise

- Attract impact-motivated investment
- Recruit passionate & talented staff
- Attract aligned partners & customers
- Align impact language with sector standards

### Advance your enterprise's impact

- Understand impact on beneficiaries
- Understand impact viability
- Understand impact risk

## WHO?

### ENTERPRISES

For-profit enterprises advancing positive impact through business practices, products, and/or services.

### FUNDS

Grant, loan, or equity funds advancing positive impact through an investment thesis and investments in impact-driving solutions.

### REAL ESTATE INITIATIVES

Real estate projects advancing positive impact in the neighborhoods and communities in which they operate.

## TOOLKIT CONTENTS

- ① CREATE A BASELINE IMPACT STATEMENT
- ② TRACK & MEASURE IMPACT
- ③ PARTNER TO ACCELERATE IMPACT

### IN PARTNERSHIP:

This resource was created with the support and partnership of Ben Franklin Technology Partners and the Investors Circle Philadelphia Chapter with partial funding from the U.S. Economic Development Administration (EDA).



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## CREATE A BASELINE IMPACT STATEMENT

Create a baseline impact statement by answering the following questions, informed by the Impact Management Project's 5 Dimensions of Impact. Share your Impact Statement by utilizing the 1-pager and slide design templates below.

### Did you know?

The Impact Management Project (IMP) 5 Dimensions of Impact was created by a community of practice with 2,000+ organizations building global consensus on measuring, assessing, and reporting impact. > [impactmanagementproject.com](https://impactmanagementproject.com).

### WHAT

> [learn more](#)

What impact outcome does your enterprise contribute to?

Which Sustainable Development Goals (SDGs) does your impact outcome map to? > [See SDGs](#)

Do you measure your impact outcomes against any thresholds?

### WHO

> [learn more](#)

Who does your enterprise primarily affect?

Do you affect customers, employees, local communities, suppliers and distributors, and/or the planet?

### HOW MUCH

> [learn more](#)

What is the scale (i.e. # of stakeholders) that experience impact outcomes?

Is the duration of impact that stakeholders experience short-term, medium-term, or long-term?

What is the depth (i.e. degree of change) of impact stakeholders experience?

### + CONTRIBUTION

> [learn more](#)

Would your desired impact outcomes happen anyway, had your enterprise not intervened? Why or why not?

### △ RISK

> [learn more](#)

Is your enterprise subject to any impact risks? [See list](#)

Which risks are of highest concern and why?

## LOCAL IMPACT

Does your enterprise's business practices, products, or services benefit your enterprise's local region? How?

## TOOLKIT RESOURCES

### Impact Statement 1-Pager

Create a designed, 1-page Impact Statement to share with investors, partners, and other stakeholders.

[1-Pager Template in Canva](#)

### Impact Statement Slide

Create an Impact Statement slide that can be added to your slide deck.

[Slide Template in Canva](#)

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## TRACK & MEASURE IMPACT

Tracking and measuring impact ensures that your enterprise is moving beyond intention to positive impact outcomes. As the Impact Management Project states, "to measure any impact (defined as a change in a positive or negative outcome for people or the planet), five dimensions of data are needed."

## QUESTIONS TO CONSIDER BEFORE TRACKING IMPACT

- What are your goals for tracking impact?
- Have intended impact outcomes been identified? Have associated indicators been identified?
- What data can inform tracking? What are the sources for this data?
- Do you have the in-house resources (i.e. time, expertise, etc) to conduct this tracking?
- What additional resources might you need? What budget do you have for these resources?
- Who cares that you track impact? Have you gotten buy-in from stakeholders?

As your enterprise grows, you can aspire to more fully track and measure impact using the following IMP framework or other industry frameworks, templates, and best practices.

### TOOLKIT RESOURCES

#### Impact Tracking Spreadsheet

The following IMP template was created for those starting to measure impact from scratch or as a checklist for impact data required for assessment.

[IMP Tracking Template](#)

## PARTNER TO ACCELERATE IMPACT

You are not alone. Once you start this process, you may find you need additional support or you may be ready to take next steps. If so, ImpactPHL can connect you to aligned resources, services, and partners.

## POTENTIAL RESOURCES TO ACCELERATE YOUR IMPACT

- Impact assessment & reporting
- Impact capital connection
- Impact subject matter expertise
- Impact communications support (ex: content, reports, PR, etc.)
- Data resources
- Surveying beneficiaries

### TOOLKIT RESOURCES

#### Connect to ImpactPHL

ImpactPHL is building a local network of impact leaders and practitioners that can support your impact. Ready to connect?

Email Megan McFadden at [megan@impactphl.org](mailto:megan@impactphl.org)