

REPORT

SAMVAD
CONVERSATION

MAKING A
DIFFERENCE:
ADAPTING
IMPACT
MEASUREMENT

23 NOVEMBER 2021

5 – 7 PM



Empowering civil society

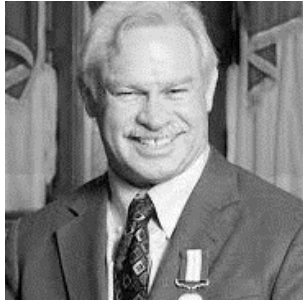


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KEY TAKE-AWAYS

- ***Adapt impact measurement as if people matter*** – We need to make sure that impact measurements make lives better for micro-level communities and individuals. There should be a new openness to dialogues to create a hybridisation of methods from both the young and old players.
- ***Bring together gender and sustainability lens*** – We need to invest in the nexus of gender and sustainability lens. As it is an innovative toolbox of standards and metrics for financial institutions enterprises and can also be a powerful sight of ingenuity in advance.
- ***Need to have a strong context of impact measurement*** – As impact measurement is a collective effort, we need to ensure that people have a say on how their work is going to be measured. In addition, these measurements are used for improvements rather than instilling fear.
- ***Funders must change their stance reflecting power*** – Funders need to be in the center of the game and influence the shaping of what is being monitored and evaluated. As funders often see impact assessment as an endeavour to build social and political capital.
- ***Data dissemination is important*** – There is a need to develop and design effective data collection tools to ensure high standards of outsourcing to undertake impact assessment.
- ***Build trust between funders and communities*** – It is important to build trust between external agencies and the communities for any developmental intervention. Otherwise, the communities might be conditioned to behave as the funders would like them to behave.



Dr. Edward (Ted) Jackson, Senior Research Fellow, Carleton University, built a distinguished career over more than 20 years at Carleton University in teaching, research and administration, retiring in 2014. An active, multi-disciplinary scholar, Professor Jackson serves on a wide range of academic and professional committees, including the editorial advisory boards of The Engaged Scholar Journal, the Journal of Sustainable Finance and Investment, and the Journal of Finance and Risk Perspectives.

Ms. Naghma Mulla, CEO, EdelGive Foundation, India has been instrumental in driving the vision of EdelGive Foundation towards the growth and scale of the organisations the foundation supports. She plays a large role in enabling commitments to our diverse portfolio of NGOs, by creating valuable partnerships with reputed international and national stakeholders within the sector. Naghma is mentor at the Nadathur S. Raghavan Centre for Entrepreneurial Learning at IIM Bangalore, providing strategic support to several start-ups.



Dr. Simi Mehta, CEO & Editorial Director, IMPRI Impact and Policy Research Institute, India, holds a Ph.D. in American Studies from the School of International Studies, Jawaharlal Nehru University, and was a Fulbright Fellow at Ohio State University, USA. Her areas of research include US and India's agriculture and foreign policies, international security studies, sustainable development, climate change, gender justice, urban environment and food security.

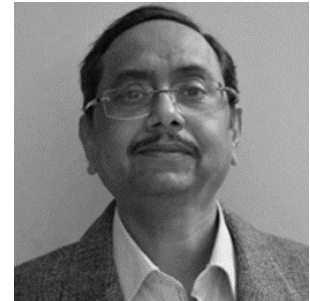
Ms. Nancy MacPherson, Acting Head of Impact, Mastercard Foundation, Canada oversees the implementation of their new Impact Strategy in Africa and Canada – a strategy that was inspired by the late Sulley Gariba. In her unique role, she leads a team that includes MEL Innovation and Impact Labs, Impact Analytics and Outcome Evaluation team that evaluates the Foundation's investments in Africa and Canada. She played a key role in the establishment and nurturing global and regional development evaluation professional associations and networks.





Mr. Jignesh Thakkar, Director, Sustainability & CSR Advisory, KPMG India has extensively worked for various clients in of CSR and Development Sector by way of developing policies and strategies, designing programs, due diligence of implementing agencies, setting up governance framework, annual reporting and assurance on CSR, etc. He has 14 years of extensive experience in the development sector with focus on poverty alleviation, livelihood, education, community development, capacity building, governance and other allied development sector areas.

Dr. Yogesh Kumar, Executive Director, Samarthan, India has an experience of more than 25 years in the development sector and is a professional of international repute on the issue of participatory governance and development. He also has active engagement in local governance, accountability and transparency discourses with expertise in participatory planning, social audits, citizens report card, community score cards etc. He facilitated emergence of a network of elected representatives of Panchayati Raj Institutions in Madhya Pradesh.



Dr. Rajesh Tandon, Founder President, Participatory Research in Asia, India, is currently a UNESCO Co-Chair on Community Based Research and Social Responsibilities in Higher Education. He serves as chairperson of the Global Alliance on Community-Engaged Research (GACER) network, which facilitates the sharing of knowledge and information worldwide to further community-based research and has also served as an Advisor to the Commonwealth Foundation, UNDP, and numerous other international agencies.

Dr. Kaustuv Kanti Bandyopadhyay is the Director of Participatory Research in Asia (PRIA), India. For more than 30 years he has been working on citizen participation in urban and rural contexts. He is an internationally acclaimed researcher, trainer, and facilitator of organisation development and participatory planning, monitoring, evaluation, and impact assessment. Currently, he is the Co-Coordinator of Asia Democracy Research Networks (ADRN) and serves on the Governing Council of Asia Democracy Network (ADN).



As Participatory Research in Asia (PRIA) completes its 40 years, it recommits to continue institutional strengthening and capacity development support to civil society and non-profits with a special focus on new-generation civil society and non-profit groups. Between August and December 2021, PRIA will be convening [PRIA@40 Conversations](#) with communities, partners, associates, supporters, experts, investors and colleagues, drawn from civil society, government, business, media and academia, to share ideas and experiences that can help 're-imagine' PRIA, its interventions and the world in the coming period.

In this context, PRIA convened a conversation (samvad) on [Making A Difference: Adapting Impact Measurement](#) on 23 November 2021 in collaboration with [Impact and Policy Research Institute \(IMPR\), India](#). The webinar was attended by 51 participants, was moderated by **Dr. Kaustuv Kanti Bandyopadhyay** (Director, PRIA).

The conversation focussed on the following key questions:

- What approaches, methods and tools can be adapted to measure impact? What lessons can be drawn from the international experiences?
- What capacity-building strategies and interventions can enable scaling up impact measurement practices?
- What are the ways in which impact evaluation can be made independent and free from biases?

The conversation (samvad) began with a short presentation by **Ms. Yashvi Sharma** (Training Specialist, PRIA) on PRIA's journey over the past four decades. PRIA considers itself as educators and facilitators, supporting individuals, organisations and grassroots initiatives to learn, change, grow, and sustain themselves. PRIA's support has been in form of sharing information and ideas; generating new knowledge, building linkages and relationships; providing intermediation expertise, and at times emotional support. Over the last 40 years, PRIA has worked on Right to Learn, Right to Know, Right to Information and Right to Participation through various thematic areas.

In the early 1980s, PRIA provided support to hundreds of voluntary organisations to clarify their vision, mission and strategies to be effective at the grassroots. As the CSOs grew and matured, PRIA provided training, mentoring and coaching support on a variety of themes related to their institutional strengthening. Since 2008, PRIA International Academy has been spearheading the capacity-building efforts of PRIA through its numerous educational programmes customised for civil society and non-profits. PRIA has been instrumental in catalysing the birth of CIVICUS and FIM Forum for Democratic Global Governance – two global networks which have been championing civil society voices, since their inceptions. To read more about PRIA's interventions on the theme **Empowering Civil Society**, click [here](#).

As newer development challenges emerge, these would require newer solutions which mean that innovations must continue. But with the changing resource support and tougher regulations on the civil society organisations and the sector as a whole, an emphasis on a particular type of scaling up is required. In this context, **Dr. Bandyopadhyay** invited **Dr. Edward (Ted) Jackson** (Senior Research Fellow, Carleton University, Canada) and **Ms. Naghma Mulla** (CEO, EdelGive Foundation, India) to set the stage for the discussion.

'We need to measure what matters most to the economically and politically marginalised', said **Dr. Edward (Ted) Jackson** (Senior Research Fellow, Carleton University, Canada). Our challenge is to figure out what impacts are important and to whom, especially to the

marginalised in a global economy that demonstrably does not work for all. Some asymmetries persist in terms of voices and resources available to different actors. It's a permanent task to bust those asymmetries and replace them with equality, opportunity and reciprocity. Work in the social market space – social enterprise, social innovation, impact investing, blended finance, gender lens investing – has been marked too often by caffeinated discourse. But it has also brought advances in technology applications, leanness and efficiency, common metrics and standards, and embedded the impact function in the daily management of institutions. Choosing the most appropriate unit of analysis for impact assessment is crucial.

In impact assessment micro matters the most i.e., the fundamental question is whether or not people's lives are getting better? It is time for a new openness to dialogue that is brokered by younger players and creative hybridisation of methods. Impact assessment must engage with social media, despite its anti-science conspiracies and authoritarian controls to flash organising of progressive campaigns. Gender lens investing has generated an innovative toolbox of standards and metrics for financial institutions. The nexus of gender and sustainability can be a powerful site of ingenuity and advance.

Post-COP 26, sustainability itself has become a driver in reframing and reshaping the way we do impact assessment. In the impact investing and blended finance world, practitioners are greening their impact platforms and instruments for good reasons. We need to establish funding consortia for permanent observatories and labs that will coordinate scarce resources on a large scale. Sector-specific studies are needed for donors and investors to allocate resources. It is imperative that we build the domestic philanthropic networks, foundations and funds as a priority to fund progressive impact assessment over the next 30-40 years. A favourable policy and regulatory environment would accelerate this process. We must create an impact assessment that is free from biases. While it is clear that both quantitative and qualitative tools and data are required for optimal impact studies, it is important to note that qualitative impact assessments tend to be slow, complicated and expensive. We need to figure out ways to make it a cost-effective process.

“asymmetry persists in voice and resources available for evaluations and impact assessment”

Ms. Naghma Mulla (CEO, EdelGive Foundation, India) said that the crux of the ‘why’s’ and the ‘what’s’ of many issues that we face while measuring impact is because impact means different things to different people. If used well, impact measurement can prove to be a powerful tool. Therefore, it is extremely important that when we go through impact measurement, we have a strong lens on the context of why and for what are we measuring the impact. If this context is not strongly placed, it can become a tool of instilling fear instead of ensuring that change happens.

Sharing some good practices for impact measurement, she said that when we discuss using impact measurement for improvements in civil society, the fundamental question is – what are we really aspiring to do? Bringing in **Dr. Edward’s** remark that many fantastic tools are already in place and being used across the world, she added that we must assess as to what are we fundamentally looking to change and why should it be any different from before? In order for this to happen, she re-emphasised, we need to read the context. However, the fundamental question that she raised was – why should impact mean different things to different people? The lack of standardisation of basic concepts of well-being, welfare and improvements has been a deterrent to how we can improve our work in the sector. Edelgive works with a cluster of small and medium organisations. There are some basic benchmarks for organising their impact measurement

One, the measurement for them is a collective effort. There is a dialogue and setting up of those benchmarks together with the organisation that is doing the work at the ground level. The idea is to ensure that those who work get to have a large say in how the work is going to be measured and how the measurement is going to then impact the results.

Two, it's important to remind ourselves as well as those who work with us that our measurement is to improve and not to instill fear. Impact measurement when commissioned, the stakeholders cannot be fearful of what may be found or that they won't have a stellar record. We need to think of it as an assessment of the situation. It gives great comfort to different participants who have been involved in bringing it to a point where measurement is happening. This leads to measuring true impact rather than it becoming something that instills fear as soon as it is commissioned.

Collectivising and having people on the same page and ensuring that impact is always contextualised for improvement, helps one go a long way. The impact measurement is an exercise to act, course correct and figure out the focus areas for our interventions. The language of impact measurement needs to be simplified because sometimes language becomes a barrier instead of being a connector. The jargons are not always understood. Diversity ensures that we are speaking different things to different people.

“impact should not mean different things to different people”

To take the discussion forward, **Dr. Bandyopadhyay** invited the panelists to deliberate on the focus questions of the conversation (samvad).

‘Funders have lost their way over the last couple of decades in the stance that they take for monitoring and evaluation’, said **Ms. Nancy MacPherson** (Acting Head of Impact, Mastercard Foundation, Canada). We, the funders, have continued to reinforce power. We have allowed ourselves on both – supply and demand side, to largely make it about us. We need to use the opportunity around monitoring and evaluation as an endeavor to build social and political capital, to understand what matters and to whom. So that we, as funders, can ensure that those voices and narratives are represented in the decision-making. She reiterated **Dr. Bandyopadhyay’s** comment – *short-termism is still with us* and said that it's a long-term game and we need to stay in the game.

We need to reverse some of the asymmetries of power and find a balance. If we intend to change our stance on this, we need to take a serious look at the evidence and the narrative that is at the heart of what and who we fund. The last two decades have shown us that we need to understand the journey to impact as it is all about system change which is complex. If we don't understand this journey through the voices of those that we seek to support, we will fail. Both funders and our field need to realise that we need to lead with the strategy and follow with the technical because too often we lead with our shiny tools and get nowhere. We have failed to evolve well enough to get to the table early and influence what is being monitored and evaluated and why? She concluded, *‘There’s a lot of goodwill on the side of funders but there’s also a huge challenge in reversing the asymmetries of power’*.

“lead with the strategic and follow with the technical”

Mr. Jignesh Thakkar (Associate Director, Sustainability & CSR Advisory, KPMG India) said that the larger challenge in the sector is that of identifying a common definition of impact. We need to acknowledge that each one of us comes from different background and for each one impact is different. Hence having a common definition of impact among the stakeholders who are invested and who are at the receiving end, becomes critical. There is a push and pull

between the donor community and the implementing agency. Large segment of donors believes that there is an *obsessive monitoring disorder* which they want to push to the not-for-profits. Nevertheless, the not-for-profit sector is equally smart to catch up with the space. But unfortunately, they have picked up another *obsessive professionalism disorder* i.e., they prioritise the mechanical outputs which the corporates would like, however, with this push and pull the larger intent is getting lost.

Another important factor is the convergence and the leverage – we want to converge, leverage and create collective action to be a catalyst when we fund a project. But unfortunately, this does not get translated in the reports. The report is more about the funder's impact rather than the collective impact for different stakeholders. He said, '*We always want to communicate what we have done and not what we have collectively done in the programme*'.

The Ministry of Corporate Affairs (MCA) has mandated impact assessment in India. As a result, many boutique organisations have flourished but the concern is whether they are sensitised enough on the need for doing an impact assessment. There is a need for us to sensitise the sector on the issue. For the last couple of years, the focus has been moving towards funding outcomes and impact. Global Environmental, Social and Governance (ESG) investing suggests that huge investments are flowing in the development sector towards outcomes. As funders, our focus should not only be on funding activities but also looking at the impacts. The development sector needs to sensitise the community. In his closing statement, he said, '*There is a lot of greenwashing which is happening in the market. We have touched millions of lives and that is impact washing*'.

“in the push and pull between funders and non-profits, we are moving into the phase of obsessive monitoring disorder and obsessive professionalism disorder”

Dr. Simi Mehta (CEO & Editorial Director, IMPRI Impact and Policy Research Institute, India) said, '*As a researcher, I have been living with a constant struggle of reconciliation between the ideal and the real*'. The ideal is a set of objectives that should be translated on the grassroots level. While the real being a set of objectives that can be translated at the grassroots level through action-based research.

Echoing **Ms. Mulla's** comment – *impact should not mean different things to different people*, she said that this is an effect that arises from any sort of intervention. While it could be planned/ unplanned on the one side, it could be positive/ negative on the other side, but the impact is an effect. To measure impact the funding organisations and the implementing agencies need to understand who is at the receiving end. We need to adopt a step-by-step approach with a basic understanding of the methodology. It needs to lay down the process of data collection, analysis, and dissemination of findings for far-reaching impacts.

It is important to conduct independent or unbiased research that needs to be monitored by the funding organisations to ensure that the data collection methods are of a high standard. This is where the background and the qualifications of the organisation become very important. Such background checks need to be done before outsourcing impact assessment to a third party. This outsourcing creates a separation between the design and the implementation. The budgeting of the project must factor in the incentives and the per diem allowances of the researchers, which is usually the least. If we have to have an independent and unbiased impact assessment, we need to have decent funding.

“we must ensure the highest standards in data collection”

At this juncture, **Dr. Bandyopadhyay** requested **Dr. Rajesh Tandon** (Founder- President, PRIA) to share his reflection on the approaches and strategies that could be used to design a participatory impact assessment?

Dr. Tandon said that for us to design a participatory impact assessment, first we need to ask ourselves who is the primary stakeholder? Unless we focus on the values, importance and criticality of the result in the eyes of the primary stakeholder, all our efforts are nothing but *obsessive*, in **Mr. Thakkar's** words. Second, we need to dwell on the purpose of our work. The purpose is to improve the lives of the people and not to prepare a report or a glossary of shining examples. In this context, he quoted **Prof. Saleem-ul-Haq** from International Center for Climate and Development, Dhaka and said, '*Unless we learn together with local communities, our expert scientific expertise will have no meaning*'.

“we must focus on the criticality of results in the eyes of the primary stakeholders”

Dr. Yogesh Kumar (Executive Director, Samarthan, India) said, '*The moot question is whose reality counts in this whole process of being 'unbiased and independent' and also how can we make our evaluations more objective*'. If people matter to us, then their reality counts. These realities cannot be captured through structured quantitative indicators. In this process of monitoring and evaluation, we need to build people's trust. There is a lot of unlearning that has to happen among the professionals that are in the field of monitoring and evaluation. They need to become facilitators of learning, facilitators of the process of change and believe that if people are not in the center, then the desired change will never happen. We, as facilitators, can only be the instruments of change. To make the process participatory; we need to invest in building the right kind of monitoring system within the organisations. The donors need to invest in developing capacities of small and medium organisations by giving them human resources, funds and other resources so that they can become more reflective when they dialogue with the communities. There needs to be a comprehensive understanding of what change means for all of us and what do we want to measure? The donors have neglected the whole value chain in this process of change. In this value chain, support organisations have an important role to play. For small and medium organisations and communities to become strong, the support organisations need to become stronger. We need to have a value addition model in which the local resource organisations have the capacity for monitoring and evaluation. The donors are living in an era where they need everything yesterday. As a result of this short-sightedness, the whole dynamics of development is changing. We are drifting from the empowerment model towards the welfare model. To change the mindset to be able to empower the communities, we need to shift our gears of mobilising and providing resources to the small and medium organisation. There needs to be a dialogue between the donor and the multi-stakeholders. The challenge of participatory monitoring and evaluation is aggregation. The tools need to evolve with technological innovations.

“focus on output is moving us away from the empowerment model”

Meet our panellists...



L to R: Dr. Kaustuv Kanti Bandyopadhyay, Dr. Yogesh Kumar, Dr. Edward Jackson, Dr. Simi Mehta, Ms. Nancy MacPherson, Mr. Jignesh Thakkar, Ms. Naghma Mulla and Dr. Rajesh Tandon

Moving on to the second round of deliberation **Dr. Bandyopadhyay** invited the panellists to share their thoughts on *the capacity-building strategies and interventions that can enable scaling up impact measurement practices and the ways in which impact evaluation can be made independent and free from biases?*

Dr. Jackson highlighted that it is a long game for which we need a long-term view, and it is time to renew that vision. The capacity has to be built in a strategic way for the field where the concerned parties call it a coalition for progressive impact. We need mechanisms to build an independent funding pool for small and medium organisations.

Dr. Mehta stressed on the need for clarity on the target group – how inclusive it is, does the group represent a section of the society for which the intervention is needed, are we representative of their voices or purely presenting their voices – in all this, we need to make sure that the target groups do not lose out at the end of the project cycle. A real assessment of the situation at the grassroots is very important. Any kind of project intervention needs holistic policy support and a gradual re-orientation of the policy perspective. Thus, our focus must be on building strong partnerships and project interventions with agencies. There needs to be a continuous exchange of information and learning. We need to have a bottom-up approach instead of a top-down approach.

Mr. Thakkar deliberated that impact assessment needs to be independent, but it cannot be done in isolation. It is imperative to engage with multiple stakeholders to figure out the way forward. Secondly, we need to move the needle from measuring impact to managing the impact to achieve larger outcomes to influence more stakeholders.

'Funders talk about scale transformation and systems change but they continue to fund individual projects', said **Ms. MacPherson**. There is a misalignment between the will and aspirations of funders. On the funding side, the funders need to understand the long game and stay in it while they continue to fund the short game. We need to be at the table for the short game and nudge things forward. In rhetoric, we have managed to nudge things forward but what we are looking for is transformation, scale and systems change. Funders need to develop the capacity to figure out a model for collective impact. We also need to envisage our capacity for us to be at the front end of influencing change and not at the tail end of evaluating it. Much of our field and the future depend on us being at the front end. We need to change the market and the capacities in the market to meet the moment.

Mr. Kumar emphasised that when we talk about building capacities of the small and medium organisations that are connected to the communities, it is important to note how we invest in these organisations to become a learning organisation. Ultimately, the monitoring and evaluation process has to be seen in the context of the organisation development for it to be transformative. It should not be seen in isolation. We need to develop systems of monitoring within these organisations to make their monitoring system robust. We need a cadre of facilitators who can invest in these organisations on a long-term basis. We need models that add value to small and medium organisations. There is a dissonance in the kind of impact we want and the kind of instruments we use to bring that change. It is critical that we re-look at the design of our funding practices.

For the closing segment of the discussion, **Dr. Bandyopadhyay** invited **Dr. Tandon** to share his reflections and some key takeaways from the discussion.

In his closing remarks, **Dr. Tandon** said that if we have to change the field, we need to work at both ends – the civil society and their donors. Civil society organisations must negotiate with their donors and the more collective the process is, the better it is as it tends to equalize power. Therefore, the conversation about what is valuable, what needs to be measured, how that needs to be measured, etc., should happen at both ends. Civil society is playing the game with obsessive professionalism instead of paying attention to their work on the ground. They are more concerned about cleaning up the report. He urged everyone to focus on how we can learn and improve to make the process more inclusive.

The conversation (samvad) ended with a vote of thanks by **Dr. Kaustuv Bandyopadhyay** (Director, PRIA).

5.00 pm to 5.20 pm

Welcome and Introduction to PRIA@40 Programmes and Conversation

Moderator: Dr. Kaustuv Kanti Bandyopadhyay, Director, Participatory Research in Asia (PRIA), India

5.20 pm to 5.40 pm

Setting the Stage

- Dr. Edward (Ted) Jackson, Senior Research Fellow, Carleton University, Canada
- Ms. Naghma Mulla, CEO, EdelGive Foundation, India

5.40 pm to 6.20 pm

Deep Dive Conversation (opening round)

- Ms. Nancy MacPherson, Acting Head of Impact, Mastercard Foundation, Canada
- Mr. Jignesh Thakkar, Associate Director, Sustainability & CSR Advisory, KPMG India
- Dr. Simi Mehta, CEO & Editorial Director, IMPRI Impact and Policy Research Institute, India
- Dr. Yogesh Kumar, Executive Director, Samarthan, India

6.20 pm to 6.35 pm

Open Discussion

6.35 pm to 6.50 pm

Deep Dive Conversation (closing round)

6.50 pm to 6.58 pm

Key Takeaways

Dr. Rajesh Tandon, Founder-President, Participatory Research in Asia (PRIA), India

6.58 pm to 7.00 pm

Vote of Thanks and Closure

Dr. Kaustuv Kanti Bandyopadhyay, Director, PRIA, India

PRIA@40 EVENTS

| DATE | TITLE | THEME |
|-------------------|--|------------------------------------|
| 12 August 2021 | Youth Participation and Active Citizenship | Citizen Participation |
| 20 August 2021 | Planning for Urban Informalities | Sustainable Urban Future |
| 31 August 2021 | Accelerating Capacities in Civil Society and Non-Profits | Empowering Civil Society |
| 2 September 2021 | Nurturing Civil Society Partnerships in Uncertain Times | Empowering Civil Society |
| 15 September 2021 | Redesigning Civil Society Ecosystem: From Local to Global | Empowering Civil Society |
| 28 September 2021 | Unlearning Patriarchy: Expanding Impacts of Gender Training | Making the Gender Leap |
| 30 September 2021 | Investing in Civil Society Innovations | Empowering Civil Society |
| 01 October 2021 | Community-led Adaptations: Water is Life | Decentralised Community Governance |
| 06 October 2021 | Inspiring Leadership of Mayors and Councillors for Inclusive Urbanisation | Sustainable Urban Future |
| 12 October 2021 | Trajectories of Participation: From Development to Governance | Citizen Participation |
| 20 October 2021 | Scaling up Citizen Engagement for Inclusive Urban Governance | Sustainable Urban Future |
| 01 November 2021 | Gender Transformational Organisational Renewal: Towards Gender Equality | Making the Gender Leap |
| 17 November 2021 | Participation, Representation & Accountability: Strengthening the Movement | Decentralised Community Governance |
| 23 November 2021 | Making a difference: Adapting Impact Measurement | Empowering Civil Society |