



Building a Community of Practice

Recap and key takeaways from
the Amp Impact Virtual Summit

November 2020



Introduction

Last year, Vera Solutions and Salesforce.org co-hosted the inaugural Amp Impact Summit in Amsterdam to bring together a passionate group of professionals with a shared interest in strengthening accountability, data management, and impact measurement in the social sector. We were inspired to see organizations of different shapes and sizes come together to connect, share common challenges, and learn from each other.

In light of the COVID-19 pandemic this year, we decided to take the Amp Impact Summit virtual, offering customers and partners around the world a unique opportunity to meet face-to-face (or at least webcam-to-webcam). The virtual event, hosted in November 2020, convened key leaders and technology practitioners from nonprofits, foundations, impact accelerators, government agencies, and social enterprises.

"As a social enterprise and B Corp, Vera Solutions is committed to creating positive impact for our clients, our staff, our partners, and our planet both in the way we work and the products and services we deliver. This Summit serves to bring together our community to virtually engage, to help refine and strengthen Amp Impact, and to share best practices in an effort to further the important work of our clients and our collective progress on the SDGs."

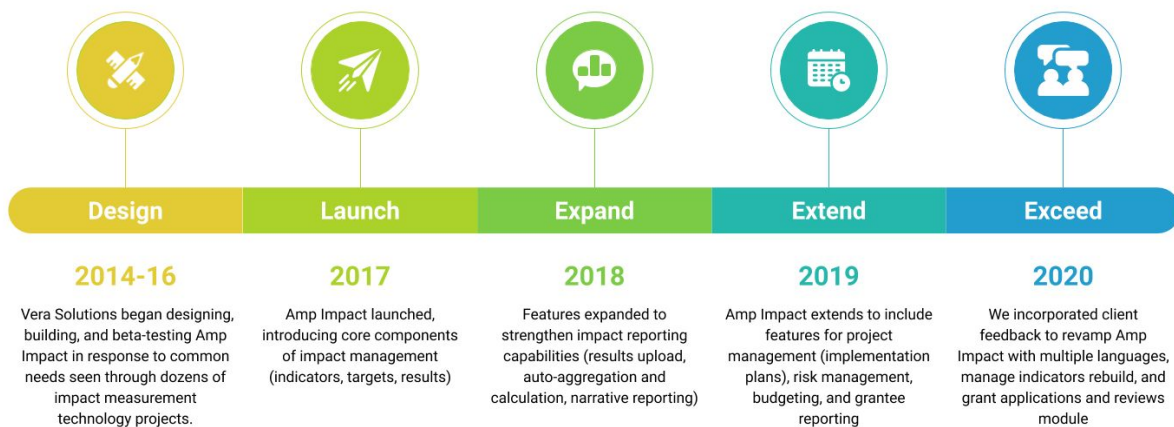
– Zak Kaufman, CEO and Co-founder, Vera Solutions

Our goal is to foster a community of practice around a range of important topics – from technology rollout and change management to best practices in monitoring, evaluation, and learning (MEL) to long-term system ownership and governance. The Amp Impact Virtual Summit also provided an opportunity for us to meet with users and partners, share the vision behind Amp Impact's creation and continued development, receive input into the product's direction and roadmap, and begin to establish a community amongst Amp Impact users seeking to advance both their organizations and the product.

Moreover, the Summit provided a platform for users to form connections with each other and share challenges, opportunities, and successes they've experienced. Collaboration is key to achieving our respective missions, and we look forward to future opportunities to connect, share, and learn from one another as we seek to strengthen and grow Amp Impact, its footprint, and its community in the years ahead.

Reflecting on Amp Impact's Journey

Since initially launching Amp Impact on the Salesforce AppExchange in 2017, we've remained deeply invested in developing the product in consultation and collaboration with customers and partners to meet a wide range of impact measurement and portfolio management needs. Before jumping into what's next for Amp Impact, here's a look at where the product started and how far it's come in three years.



Vera Solutions built Amp Impact after years of seeing similar requirements for M&E and portfolio management (including program management, project management, and grants management) systems from organization after organization. We began designing the earliest version of Amp Impact in 2014, with a primary goal of offering a packaged—yet flexible—solution on Salesforce for impact measurement across projects/programs/grants. When the product was first launched in 2017, it enabled users to create and manage standard and custom indicators, set targets, and monitor results against those indicators across geographies and over time. Later in the year, Amp Impact introduced pages for building a logical framework and tracking disbursements.

The following year, Amp Impact's feature-set expanded to strengthen impact reporting capabilities. We introduced offline tracking of targets and results with Excel download/upload functionality as well as narrative reporting, templates, and radar charts through the Submissions feature. We sought to further streamline data entry for results with the introduction of auto-aggregated and auto-calculated indicators.

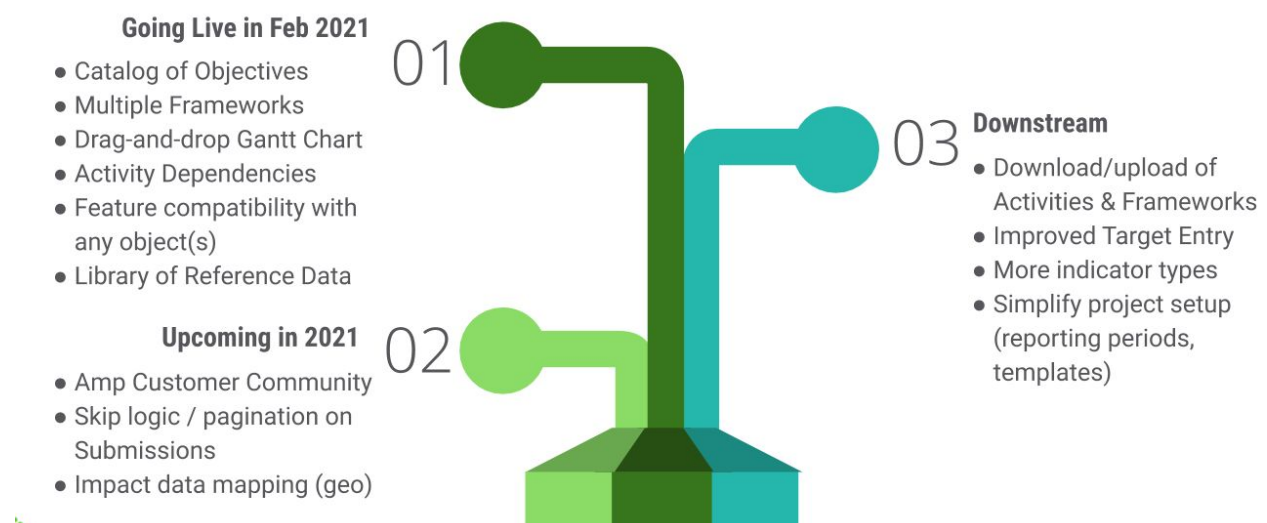
In 2019, we focused on extending Amp Impact's project and grants management functionality, with the introduction of [implementation plans and activity tracking](#), [risk management](#), and budget and expenditure tracking (including [Excel download/upload](#)). We broadened the Submissions feature to work on any Salesforce object, simplified the interface for extended grantee reporting in Salesforce Communities, and introduced [click-based IATI publishing](#).

Now deployed in over 100 countries, Amp Impact has seen a more than 150% growth in users across the globe in 2020. This year, we've launched two major releases (with another one on the way), focused on taking the product's existing features to the next level and enhancing UX. Amp Impact can now be used in [numerous languages](#), and several features like Indicators and Submissions have been enhanced, incorporating customer feedback. We also introduced the new [Grant Applications and Reviews Module](#), which further empowers funders to monitor calls for proposals and in-progress applications within the same platform that they monitor allocated grants and measure impact data. Finally, we've partnered up with other Salesforce implementation partners--including Acumen Solutions, G-Company, and Isobar--to deliver transformative solutions for more organizations worldwide.

Amp Impact would not be what it is today without the dedicated community of nonprofits, grantmakers, and technology partners around it. We're continuously working to scale and improve the product to drive stronger portfolio management and impact measurement.

What's next for Amp Impact?

We have many exciting plans on the horizon for Amp Impact. The next release, *Electra*, is slated for February 2021, with major UI/UX enhancements for logical frameworks and activity tracking. Users will be able to add standard objectives from a catalog to a project's Framework, to create multiple Frameworks within a project, and do more sophisticated project planning, with activity dependencies, drag-and-drop gantt charting, and critical path functionality. Additionally, Amp Impact is becoming "headless," so organizations will be able to use Amp Impact's features on any object(s), not just the Amp Impact Project object.



We're excited to launch a brand new Customer Community in 2021 to further foster our community of practice, providing a space for customers to collaborate and learn from each other's experiences, collectively build technical and functional capabilities and knowledge, and provide feedback on Amp Impact's functionality and roadmap. Additionally, we will introduce some big new features, including mapping to visualize impact data, skip logic and pagination on Submissions, and more.

Each new feature/enhancement begins with research and listening, and the Amp Impact Virtual Summit provided a time for our customers to share their priorities for Amp Impact's development. We presented seven areas for strengthening Amp Impact and asked attendees (within small groups) to identify their top three priorities. Here are the three areas that received the most votes:

Analyzing and visualizing data in Amp Impact

Strengthening the capacity to analyze and visualize data in Amp Impact was the highest ranked priority across groups. Currently, Amp Impact leverages Salesforce Reports and Dashboards and built-in Performance Graphs to visualize targets and results. Some customers have also integrated their Amp Impact system with external analytics tools, such as Power BI, Tableau, and Tableau CRM (formerly Einstein Analytics). A few customers shared that it would be beneficial to have live interactive dashboards that external stakeholders and grantees can easily gain access to. We are in the process of scaling up data visualization with mapping functionality (expected in Spring/Summer 2021) and will look to tie in more ways to help organizations visualize data in Amp Impact.

"Visualizations help organizations tell stories and share the impact that they have achieved."

– Stuart Parry, Director Global Services, Acumen Solutions

Making Amp Impact quicker and simpler to set up

Each Amp Impact implementation looks different depending on the organization's requirements. Some organizations can get up and running on Amp Impact in weeks, while others require multiple iterations of configuration and testing. While every implementation is unique, we're always looking for ways to make the transition to Amp Impact as easy as possible on our customers. We're currently looking into the possibility of creating a "setup wizard" that would enable System Administrators to quickly tailor Amp Impact to their organization's needs, frameworks, processes, and terminology.

We're expecting that removing the dependency on the Project object (as part of the Winter '21 release) will make it even easier to integrate Amp Impact with Salesforce.org Nonprofit Cloud

products, including the Nonprofit Success Pack (NPSP), Program Management Module, Case Management Module, and Outbound Funds Module. We will continue to solicit feedback from Amp Impact customers and implementation partners on ways to simplify the setup process.

Sharing and publishing data from Amp Impact

As the sector moves towards greater transparency and generalized data sharing, we believe it's important that Amp Impact supports organizations in these efforts – and many of our customers agree. Currently, the most widely used method of data-sharing with Amp Impact is integrating it with [Salesforce Experience Cloud](#) (previously Salesforce Community Cloud), with secure portals for grantees, partners, funders, or other key stakeholders to access the information relevant to them and collaborate on data/processes. Some customers expressed that it would be helpful to share and publish data from Amp Impact beyond members who have access to the system. In 2019, we launched [IATI XML publishing](#), allowing users to export XML files from the app using the IATI Organisation and Activity standards. IATI has become the most widely adopted registry of public development and humanitarian data with over 1 million activities published by over 1,000 organisations, and we are looking to make this functionality more useful and easily accessible to customers. We're also keeping our eyes out for other opportunities to drive more data sharing and democratize access to impact data.

Deep Dives for Collaborative Learning

A large part of building a community of practice is providing a platform to discuss topics that we engage with in our day-to-day work and to learn from each other's experiences. Within breakout groups, we discussed eight topics for implementing and scaling digital technologies: 1) Building a Data-driven Culture; 2) Amp Impact and Monitoring, Evaluation, and Learning (MEL); 3) Amp Impact and Program/Project Management; 4) Amp Impact and Grants Management; 5) Integrations; 6) Analytics and Data Visualization; 7) Rollout and Change Management; and 8) Long-term System Governance and Ownership. Here are some of the key takeaways from those discussions:

Building a Data-driven Culture

Before getting into the technology, there is a business shift that needs to happen within organizations to prioritize program data, learning, and collaboration in decision-making. This breakout group discussed the important factors for building a data-driven culture within an organization, including tactical ways to break down data silos, who to include in the digital transformation process, and what a data-driven culture looks like in practice.

Common Challenges:

- Balancing requirements across stakeholders and knowing who needs to be involved throughout the digital transformation process
- Variant levels of data literacy and technology literacy among users across the organization – how can we ensure users who aren't as technology savvy can make sense of the system once it is launched?
- Despite ongoing efforts to move data onto Salesforce and Amp Impact, some vital information is still stuck on Excel spreadsheets
- Prioritizing data-driven decision-making on top of increasingly rigorous reporting requirements from funders – how can Amp Impact simplify donor reporting so more time and energy can be spent analyzing and utilizing data for decision-making?

Keys to Success:

- Approach decision-making with the question: “What does the data say?”
- Come back to the “why” often (i.e. why are we collecting and managing this data?) If there's not a clear answer then refocus efforts elsewhere.
- Open dashboards up to users and other stakeholders to show them how data is used to inform decision-making. Explore data visualization software, like Tableau and Power BI, to further open up and analyze the data.
- Establish “super users” or “champions” who can see the value of data-driven decision-making and recruit their help in encouraging buy-in from other users
- Set up digital units who can drive innovation and continuously bring user feedback into the system.

“It's not about the number of users or the amount of data; it's about the value that you're providing a set of users. Ask your users, 'What information do you need to be able to do your job better?' When you begin breaking down barriers, people start seeing the value in the data and that's when they start to get excited.”

– Tim Fives, Senior Manager of CRM & Business Pipeline Services, Global Knowledge & Information Management, Catholic Relief Services

Amp Impact and MEL

This breakout group brought together a mix of implementer and funder perspectives to discuss how their organizations are using Amp Impact for MEL, including indicator management, tracking results and targets, building and managing logical frameworks, and data visualization.

Common Challenges:

- Seeing MEL as a process for generating holistic insights that inform decisions and transform programs for the better, and not simply a donor reporting necessity.
- Ability to create regional, portfolio-wide, or organization-wide logical frameworks that project- or grant-specific frameworks can easily pull from and roll up to (note: the Winter '21 Amp Impact release will alleviate this challenge).
- Setting expectations for change management across various stakeholders and establishing buy-in from end users.
- Organizations with particularly complicated logframes and indicator management needs would benefit from more advanced disaggregation capabilities and flexibility when it comes to reporting and target frequencies.
- Visualizing MEL data beyond Performance Graphs and Dashboards to better understand and share impact stories across thematic areas, programs, and grants.

Key Takeaways:

- Design for and with the end user, making systems so intuitive that non-technical staff can get a clear sense of the data and easily drill down from global- to national- to local- to individual-levels.
- Technology should make your life easier, not more complicated – it's important to prioritize the indicators you need to understand performance, rather than trying to measure everything for the sake of measuring.
- Tableau and Power BI are helpful tools for expanding the analytics and visualization capabilities of Amp Impact. .
- Salesforce Experiences (previously Salesforce Communities) is an effective way to share data with external stakeholders, including grantees, funders, partners, and the board.
- Whether you're an implementer or a funder, it's key to balance the desired granularity of results data with what's reasonable in terms of reporting effort - you need to align the effort required for reporting with the value perceived by the end user.

"Through using Amp Impact, we've been able to reevaluate our indicators and M&E systems and ask, 'Okay, what are we measuring and does it make sense?' We can then align this with our goals and Theory of Change to make sure we're delivering what we want to deliver."

– Audria Choudhury, Program Impact Manager, Miracle Foundation

Amp Impact and Project / Program Management

This breakout group dove into the challenges that organizations face when it comes to managing a portfolio of projects and programs and the ways in which they're using or would like to use Amp

Impact's project and financial management functionality, including work planning, Gantt charts, budget and spending reports, and offline budgeting.

Common Challenges:

- Financial data and programmatic data are often siloed with financial data sitting in an ERP or accounting system and program/project data living in Amp Impact.
- Aligning everyone in an organization on a common work planning tool when everyone has their own perspective of what project management needs to look like.
- Knowing what data needs to be stored in each system and at what point they need to sync.
- Results-based management requires logframes, activities, and finances to be integrated and the system to be flexible to project changes.
- Integrating ERP systems with Salesforce can be costly and require additional tools or custom development.

Key Takeaways:

- More organizations are looking to use Amp Impact to manage financial data in relation to implementation planning in order to track budgets and spending at the activity-level.
- Amp Impact enables organizations to take a results-based management approach with the ability to align logframes to activities and activities to finances.
- Middleware tools, such as Dell Boomi or OpenFn, can help integrate ERP and accounting systems with Salesforce and Amp Impact.

Amp Impact and Grants Management

From reviewing applications and administering funds to monitoring outcomes and submitting reports, grantmaking processes comprise a range of administrative responsibilities, stakeholders, and demands for due diligence. In this breakout group, we discussed what “end-to-end grants management” means to grantmaking organizations, the challenges that our customers face when it comes to grants management, and the ways that technology can foster better data-sharing and collaboration with partners and grantees.

Common Challenges:

- Organizations have different types of grants, each with different requirements for reporting. It's challenging to create an “umbrella” theme across grants because they're frequently very different from one another.
- Grant lifecycles and reporting periods vary so much that it's challenging to track them all in one system. The grantmaking process differs for grants of different sizes or under different funding programs.
- Organizations with particularly complicated reporting needs would benefit from more advanced indicator disaggregation capabilities, like adding an additional layer of optional disaggregation.

- Lack of standardization of indicators in the sector can make it difficult to know which indicators to use.
- Keeping in touch with grantees after the grant lifecycle is complete (for example, getting grantees to complete “legacy” reporting periods to monitor long-term success of grants and grantees).

Key Takeaways:

- A platform-based solution like Salesforce accommodates different system users and needs, providing one place to foster engagement with External Reviewers, Board, Grantees, etc.
- In addition to managing outgoing grants, Amp Impact can help organizations manage incoming grants from the beginning and continue to track grants once they’re allocated to projects.
- When measuring the impact of a diverse portfolio of grants (across different geographies or thematic areas), try to prioritize standard indicators that span the portfolio (regardless of organization type, program focus, grant maturity, etc.) and then provide grantees with the option to go deeper.

Rollout and Initial Change Management

Change management includes the strategies, processes, and people – in other words, the full support system – put in place to ensure that organizations are ready to adapt to technological change and make use of a new system once it is launched. In this breakout group, we reflected on keys to success with technology preparedness, change management, and user adoption when rolling out new technology on a global scale.

Common Challenges:

- Getting buy-in from global/international staff to use the system.
- Setting up Amp Impact for end users who aren’t as technology savvy.
- Getting users out of their old habits and onto a new system.
- Thinking through multiple layers of change management within an organization and managing people’s expectations around product rollouts.
- Data migration – having lots of data in different places and formats which needs to be migrated into Amp Impact.

Keys to Success:

- Set a vision - what are our short-term goals and long-term goals and how are we going to get there over the next few months?
- Understand that change management is a multi-year process and plan accordingly. Having some “dress rehearsals” before full rollout can help identify key sticking points.
- Establish “super users” or “champions” and keep them informed in how they can initiate better adoption across end users.

- Plan for, create, and communicate “quick wins” from the system (for example, setup reports and dashboards in the system before rolling it out to users to show how data can inform decision-making from the start).
- Map out user groups and communicate clearly what is changing for each different user group of the system – walkthroughs of “old” vs “new.”
- Have clear pathways for who users should contact for support - and clear check-in points.

“When it comes to change management, it’s important to manage expectations to ensure all stakeholders understand that work will be required, but the benefits of the system will outweigh the effort involved.”

– Jaymini Patel, Program Operations Manager, World Animal Protection

Long-term System Ownership and Governance

System ownership and governance includes the procurement, development, integration, modification, operation, maintenance, and deployment of the system. For some organizations, system ownership and governance is overseen by one person, while other organizations divide up ownership and governance responsibilities across departments. This breakout session brought together a range of perspectives from implementing and grantmaking organizations to discuss key considerations for selecting a system “owner,” how to approach change management, and key success factors for using data to inform organizational decision-making.

Common Challenges:

- Deciding whether the system will be owned and governed by a single person or if it will be a collaborative effort across departments and/or teams.
- Reporting impact data back to the organization can be challenging and time-consuming.
- Communicating changes to governance structures or systems.
- Sharing M&E data internally as well as to external stakeholders.

Key Takeaways:

- Having one key “owner” for the whole system can help clarify and communicate the business value of the system.
- Include time in regular organization process planning to discuss how any changes will be implemented in your technology.
- Create a governance committee that includes representatives from Executive, Programs, IT, M&E, and end-users.
- Make time and space to debrief and revise new processes to ensure you have ways to discuss the new data everyone can access.

- Amp Impact is a tool to help close feedback loops between program and M&E staff, but ultimately there needs to be a process in place for reporting the data internally.

Integrations

Integrations allow information to move between tools so that organizations can move toward a central source of truth, improve transparency across the organization, and streamline workflow and data flow between teams. In this breakout group, we discussed the many ways Amp Impact, built on the Salesforce platform, is primed to integrate with other tools, from SMS gateways to ERP systems to mobile data collection applications. We also talked through when and how to integrate your Salesforce system with other data management systems, including Oracle and Microsoft Dynamics, to ensure all of your data is connected and speaks the same language.

Common Challenges:

- Ensuring flexibility in integrations to future-proof systems and accommodate for changes in organizational structure or work processes.
- Knowing what kind of data to bring into Amp Impact (for example, does finance data need to be integrated with M&E and program data? If so, what level of aggregation does the finance data need to be?)
- Using mobile data collection apps to capture and access data offline – how to know which tool to use and when.
- Visualizing data in interactive dashboards without added costs of additional licenses.

Key Takeaways:

- Defining what data you need to push or pull into your system is an important part of the strategy. Carefully consider the benefits of integrating data before initiating the integration process. For example, when it comes to integrating your ERP system with Amp Impact, think through what you're hoping to learn from the data and if finance data needs to be brought in at the budget line-item-level, at the aggregated budget-level, or at the project-level.
- Middleware tools, such as Dell Boomi or OpenFn, are great for integrating non-Salesforce data sources, including ERP systems, with Amp Impact
- There are numerous offline mobile data collection tools that integrate with Salesforce. The ones we recommend most often are: Taroworks (Salesforce-based), Formyoula (Salesforce-based), Open Data Kit, KoboToolbox, Magpi, and SurveyCTO.
- A key part of implementing integrations is to think about the sustainability and flexibility of the tool. If you think that your business processes change frequently, or could change in the future, then you should pick an approach or tool that maintains a level of flexibility without compromising on robustness.

Analytics and Data Visualization

Analytics and data visualization allow organizations to interpret data in a meaningful way and easily identify trends, patterns, and outliers within the data to inform decision-making and transform programs for the better. Built on Salesforce, Amp Impact leverages native [Salesforce Reports and Dashboards](#) to help organizations answer important questions about their programming and monitor performance over time. In this breakout group, we discussed the challenges that organizations face when it comes to analyzing and visualizing data, and the tools that organizations are using or looking to use to expand the analytics and data visualization capabilities of Amp Impact.

Common Challenges:

- Making data available externally without using 3rd party tools (for example, once a report is built, how can it be shared with the outside world?)
- Identifying “bad data” (inaccurate, inconsistent, or incomplete data).

Key Takeaways:

- Analytics and data visualizations are essential for organizations to understand and share their impact stories and learnings for fundraising, donor reporting, and decision-making.
- Some organizations have found success in sharing their data externally using Salesforce Experiences (previously Salesforce Communities). Others mentioned using Tableau and PowerBI to publish data on their websites. A few organizations mentioned it would be nice if Amp Impact could make this process even easier with additional analytics and data-sharing functionality.
- Data quality is key for analytics and data visualization. Some organizations have created Reports and Dashboards that help staff address data quality issues and catch outliers and “bad data.” A few organizations suggested it would be helpful to build a feature into Amp Impact that identifies duplicate data or indicators.

Thanks and Acknowledgements

We'd like to extend a heartfelt thanks to everyone who joined us for the Amp Impact Virtual Summit. We appreciate your willingness to share such thoughtful and honest feedback that will help shape the product's direction and inform how we can better support you as customers and partners.





[Vera Solutions](#) is a global social enterprise and Certified B Corporation® providing cloud and mobile solutions that help social sector organizations better track their impact, streamline their operations, and create feedback loops that put data in the hands of those who need it. Founded in 2010 out of a health education nonprofit in South Africa, Vera Solutions is inspired by the organizations and individuals we work with – social sector professionals who crave more information that’s both reliable and easy to use. We launched Amp Impact in 2017 as a common denominator solution for nonprofits, grantmakers, and impact investors to better understand their impact and drive more efficient, cost-effective programs.



[Amp Impact](#) is a Salesforce-based solution for organizations pursuing impact. Built on common needs observed during hundreds of digital transformation projects, Amp Impact enables social-impact organizations to trade in complex spreadsheets for a flexible, friendly, and integrated technology solution. It's a tool designed for grantees and grantors – a tool that streamlines workflow and data flow, from the field to local offices to HQ to funders. Amp Impact is now used in more than 100 countries to manage data for over \$1.5 billion in development programs and grants.

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