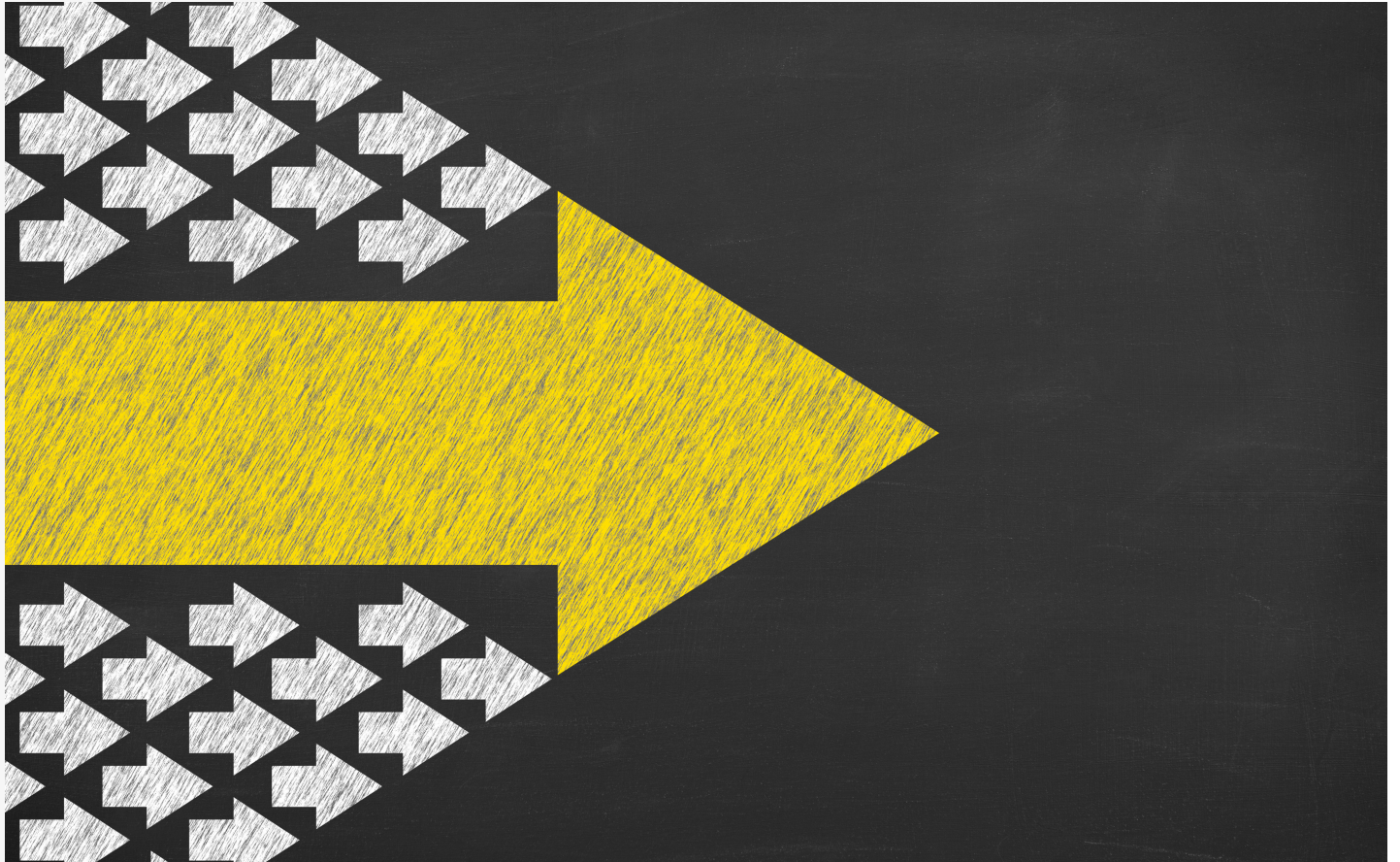# Impact Toolkits

A REVIEW OF RESOURCES TO SUPPORT IMPACT PLANNING, DELIVERY AND ASSESSMENT.

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This report presents a review of toolkits currently available (December 2020) for use in planning, delivering and assessing impacts.

Contents

SUMMARY

About this report

This report summarises details on a range of resources or toolkits currently available to support impact planning, delivery and/or assessment. The primary purpose of this document is to provide an 'at a glance' summary of materials which can help researchers plan and pursue impact pathways. The document is split into three sections:

PART 1: BACKGROUND AND CONTEXT

PART 2: HOW TO USE THIS REPORT

PART 3: RESOURCES REVIEW

Authors

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Dr Jo Edwards is the founding Director of Lucidity Solutions Ltd, UK. Jo has extensive experience in impact strategy, case studies and evidence collection, supporting a range of UK universities in their preparations for the 2020 Research Excellence Framework. Alongside the impact work, Jo also consults in university strategy, business process review and communications. Jo has a DPhil in Renaissance Culture.

PART 1: BACKGROUND AND CONTEXT

NIHR Context

The National Institute for Health Research (NIHR) is the nation's largest funder of health and care research. NIHR is primarily funded by the Department of Health and Social Care and invests over £1 billion annually into research to transform people's lives. Operating through six coordinating centres across the UK, NIHR funds the people, facilities and technology needed for world class research. NIHR's strategic mission is to improve the health and wealth of the nation through research, which it does by working in partnership with the NHS, universities, local government, industrial partners, other research funders, patients and the public.

Impact is a central feature of NIHR's strategy and operations. NIHR activity is underpinned by the Adding Value in Research framework, which sets out clear principles to ensure NIHR's work is relevant to expressed need, and delivers open, transparent and high quality research. These principles underpin the research lifecycle from priority setting, through project design, delivery and dissemination. Uptake of NIHR research is supported by partnerships with the National Institute for Health and Care Excellence (NICE) and related organisations who lead on research adoption and implementation within healthcare settings. The impact of NIHR research extends across the healthcare system, providing evidence to inform clinical guidelines, enabling cost saving within healthcare delivery and, more broadly, supporting patients to live longer, healthier lives.

Notwithstanding the unprecedented pace of research application seen during COVID, impact can often take many years to mature. [1] Knowledge mobilisation within health is an engaged, iterative and multi-partner process,[2] making it vital for researchers to configure impact plans which reflect the topic, context and needs of key stakeholders. To support this, NIHR has a range of impact-related resources available for applicants, and the development of research plans is supported within NIHR by the Research Design Service (RDS). Grant holders are required to provide evidence of engagement and impact via the Researchfish system, and examples of NIHR impact are showcased on the NIHR website.

[1] Hanney et al, 2015
[2] Phipps et al., 2016

What is impact?

Impact is variously defined by different agencies, but all broadly accord with NIHR's definition:

> **Impact is defined as the demonstrable contribution that research makes to society and the economy, of benefit to individuals, organisations and nations.**

Impact is most simply summarised as the "provable benefits of research in the 'real world'".[3] Impact is the changes we can see (demonstrate, measure, capture), beyond academia (in society, the economy, the environment) which happen because of our research (caused by, contributed to, attributable to). The direction of change is determined by the nature of the problem, and so may reflect some degree of increase (for example, improved safety, faster diagnosis, healthier patients), decrease (such as reduced costs, fewer admissions, less waste), or – particularly within healthcare – the act of stopping or replacing an ineffective or dangerous practice. Impact does not just arise from excellent research; it requires planning, effort, collaboration and corroboration. It is not just a natural consequence of the value of research, but requires a team approach to development, use and tracking.

Impact is a substantive feature of the research landscape, operating through a range of requirements both nationally and internationally. For the UK, impact now features strongly in competitive funding schemes, with applicants increasingly and routinely expected to plan impact and provide evidence of effects post-award. In parallel, researchers based in UK research institutions are familiar with the cyclical Research Excellence Framework, or REF, wherein portfolios demonstrating excellent research leading to demonstrable non-academic change are required every seven years (or so) to determine direct government funding, or Quality Research (QR) allocations.

Impact terminology

Impact is not a new concept. The research community has always sought ways to apply their work to healthcare issues, and practitioners routinely source research to deliver evidence-based practice. Over time, concepts and terminology have evolved, with impact variously described in terms such as benefit, influence or change. Phraseology has broadened from expressions suggestive of unidirectional communications ('knowledge transfer') to those more reflective of multi-directional and multi-audience engagement ('knowledge mobilisation'). Similarly, the term impact has become oftentimes synonymous with both the act of connecting research to the outside world, and the expression of the effect itself. In this report, and in alignment with dominant definitions used within the research sector, we use the following distinction:

→ **IMPACT**

The provable benefit of research outside of academia

→ **KNOWLEDGE MOBILISATION**

The act of connecting research to the non-academic world

Impact vs scientific contribution ('academic impact')

It is important to note that the term impact is sometimes also used in relation to 'academic impact', ie. the contribution research makes to academic knowledge, theory, methods and application. Such contributions may be within or across disciplines and may contribute incrementally or represent a more fundamental paradigm shift. However, whilst these contributions are extremely valuable in their own right, they should not be confused with the dominant and more formal sector definition of impact as research-led effects **outside of academia**.

Impact vs knowledge mobilisation

It is also important to differentiate between impact – the change – and the methods to achieve this (often referred to as 'knowledge mobilisation'). For clarity, **impact is not**:

- **Dissemination**, or the process of communicating the research. This is a vital activity in research, often including academic formats such as journal articles or conference presentations, or lay summaries such as media or social media. However, this is more appropriately defined as communication or knowledge mobilisation, which only 'converts' to impact when there is a resulting change.

- **Academic interest or reputatio**n, such as invitations to speak at conferences or join scientific committees. These are not effects 'beyond academia' or change for non-academics.

- **Measurable by publications metrics**. Citations are measures of other academics citing the work and therefore are not measures of impact.

- **Marked by measure of attention**, such as retweets or media interest. Whilst valuable, this attention does not show change.

Impact variations

Impact may look and operate slightly differently across disciplines, often with more protracted pathways for research at the fundamental (vs. applied) end of the research spectrum. Whilst the definition of impact is clear on where any benefits are realised, there is no prescription of how this happens. Some research, such as exploratory science, may require several baton passes before it reaches application and change. Conversely where non-academics are engaged in the research itself, benefits may start occurring whilst the research is underway. In some disciplines, the outcomes of research require regulatory approval before they can be implemented (such as in drug development), whilst in other circumstances there are no restrictions on how and when knowledge can be shared. Accordingly, impact can be:

DIRECT
Arising directly from the research, such as through implementation of a new intervention

INDIRECT
Supporting step changes or requiring further actions, such as building awareness around an issue

IMMEDIATE
Occurring soon/ straight after the research

DELAYED
Occurring some time after the research

NON-DEPENDENT
Able to generate impact at any point, including occurring at the same time as research, such as when participants benefit through involvement

SEQUENCE DEPENDENT
Requiring specific steps post research before impact can be achieved, such as requiring regulatory approval

OR

WITHIN THE SAME DOMAIN
For example, health research having health benefits

CROSS-DOMAIN
For example, health research having economic impacts

LINEAR
Occurring in a stepwise and expected sequence

NON-LINEAR/ ITERATIVE
Occurring through changeable, iterative or disrupted routes

RESEARCHER-LED
Occurring primarily through the efforts of the research, such as when the researcher delivers training

CO-PRODUCED
Occurring primarily through the actions of non-academics, such as where stakeholders adopt or integrate findings

INSTRUMENTAL
A material or tangible change, such as reduced costs or improved services

CONCEPTUAL/ CAPACITY
Non-material changes, such as new ways of thinking or opportunities arising from participating in research

SOMETHING NEW
Development of something which did not previously exist, such as a new drug or intervention

SOMETHING CHANGED
Modification or adjustment to something which exists, such as stopping an ineffective intervention

Challenges

Increasing interest in, and the existence of multiple frameworks to guide impact[4] pays testament to the growth of knowledge mobilisation and impact in recent years. The research community has become far more knowledgeable, experienced and expert in connecting research to practice and in generating change well beyond the academy walls.

Despite this, however, it remains challenging for researchers to design, adjust and pursue pathways which optimise the route from research to impact. Irrespective of the inherent value of the research, non-academic issues such as capacity, resources and motivation all influence the likelihood that research will be used in practice.

The vast range of impact guidance now available provides valuable support to help researchers navigate these paths and translate potential into real benefits. However it can be difficult to determine which tool to use, or to use in combination, to determine how best to plan or assess impact. This report focuses on this particular challenge, and is designed to help researchers assess and select from the range of tools available.

> " **Impact does not just arise from excellent research; it requires planning, effort, collaboration and corroboration.**

[4] Raftery, Hanney, Greenhalgh, Glover, & Blatch-Jones, 2016

Selected references

1. **Hanney, S,R,, Castle-Clarke, S., Grant, J., Guthrie, S.,** Henshall, C., Mestre-Ferrandiz, J., Pistollato, M., Pollitt, A., Sussex, J. and Wooding, S. (2015). How long does biomedical research take? Studying the time taken between biomedical and health research and its translation into products, policy, and practice. *Health Research Policy and Systems, 13:1*, 1. doi: 10.1186/1478-4505-13-1. PMID: 25552353; PMCID: PMC4297458.
2. Phipps, D., Cummings, J., Pepler, D., Craig, W.,and Cardinal, S. (2016). The co-produced pathway to impact describes knowledge mobilisation processes. *Journal of Community Engagement and Scholarship,* 9(1), 31-40
3. Bayley J and Phipps D. (2019) Extending the concept of research impact literacy: levels of literacy, institutional role and ethical considerations [version 2; peer review: 2 approved]. *Emerald Open Research*, 1:14 (https://doi.org/10.35241/emeraldopenres.13140.2)
4. Raftery, J., Hanney, S., Greenhalgh, T., Glover, M., & Blatch-Jones, A. J. (2016). Models and applications for measuring the impact of health research: update of a systematic review for the Health Technology Assessment programme. Health Technology Assessment, 20 (76)

PART 2: THIS GUIDE

40+ toolkits & frameworks identified

Across multiple fields of study

Strengths & limitations evaluated

Resources covered in this guide

This report details resources or toolkits currently available to support impact planning, delivery or assessment. It covers those publicly available, free of charge and accessible to any researcher online, and which offer some level of support or facilitation for research impact. The resources described here cover:

- **Planning impact,** such as designing impact pathways, identifying stakeholders, or otherwise planning the steps, activities or relationships needed for research to translate into non-academic benefit.

- **Delivering impact,** covering actions which enable the translation, such as stakeholder engagement events, policy briefings, or commercialisation activities.

- **Assessing impact,** covering means to measure, capture or otherwise demonstrate non-academic effects.

Resources may cover one of more of the areas above, and each is described alongside an appraisal of strengths, limitations and where they might best be applied. This report is compiled in accordance with the following principles:

- It does not cover, but recognises the high value of, the growing body of academic literature on impact and impact assessment. This report is limited to those materials that offer practical support for impact, rather than offering insights at a more theoretical, explanatory or critical level.

- No single tool covers the entirety of impact

- It is not an exhaustive list of all resources available for impact; there are doubtless many other guides available through more local means, such as those held within university systems, but they are not included here if not available for public access.

- It does not seek to replicate existing guidance available through key sector organisations. Accordingly, tools for public engagement only are not included here, but researchers are strongly encouraged to source the excellent resources available at NCCPE.

- It is created on the premise that whilst no single tool can offer sufficient guidance to cover all aspects of impact, each offers a particular contribution and either in isolation or in combination give researchers the opportunity to draw on existing knowledge and guidance to design their own tailored strategy.

This report covers tools available and identified in December 2020. Updates to this report may be undertaken in due course

How to use this guide

As every tool is designed for a specific (or intentionally generic) purpose and, with every research project having a different pathway to impact, there is no single best option for which impact tool to use. The right resource will reflect:

- The type or area of research you're doing
- The type or area of impact you're seeking
- The nature of the path between your research and impact
- Your own existing knowledge and skills
- Whether you're looking for generic guidance, or support on a specific aspect of impact

...amongst many other factors.

The aim of this document therefore is to summarise the range of tools available, giving brief explanations and insights into their strengths, limitations, and the research/ impact they are best or least suited to, to help you choose. This information should help identify the most appropriate tool(s) for your needs.

Part 3 provides information on the tools. These are first listed, then summarised in a series of dashboards, followed by fuller review records for each resource (on the template shown overleaf). To help navigation, resources are grouped and colour coded by the primary domain in which they were created (eg. health, arts) but it is important to note these are applicable across disciplinary areas.

You can read through all the records, or use the dashboard to narrow down your search for tools supporting planning, delivery, assessment or a combination.

Every review includes a hyperlink to the online tool, so once identified you can visit the site to investigate the resource further.

Resources template

Resource title

URL *(link to resource)*

Organisation *(who developed it)*

Subject field *(generic or specific focus)*

🔵	Planning
🟡	Delivery
🟢	Assessment

SUMMARY
Description of the intervention, its focus, format or other such defining factors

STRENGTHS
Particular benefits or advantages associated with the tool

LIMITATIONS
*Any limitations, restrictions or challenges associated with the tool*

APPLICATION

Best suited to:
The circumstances, focus or audience for which this tool is particularly appropriate

Least suited to:
The circumstances, focus or audience for which this tool is not appropriate

Keywords: *Tags to help identify the resource*

🟦	Health
🟩	Arts
🟧	Social Sciences
🟪	STEM
🟩	Broader
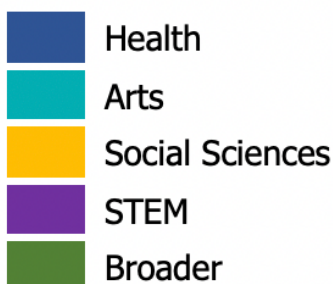
PART 3: RESOURCES REVIEW

Part 3 consists of three parts, each providing an increasing level of detail on the resources

LIST OF RESOURCES

A list of all guides, tools and other resources, categorised by their primary domain:
- Health
- Social Science
- STEM
- Arts
- Broader (non-domain specific or other focus)

DASHBOARDS

Summary tables of tools by domain, identifying which aspect of impact they support (planning, delivery or assessment) and the research or impact they may be best suited for.

DETAILS OF TOOLS

Reviews of each guide, tool or other resource, including a description, summary of strengths and limitations, and details of best/least suited applications. Records are colour coded by their primary domain and include a URL to access the resource.

List of resources

Health

- Canadian Institutes of Health Research
- Health Canada
- Health Foundation
- Macmillan
- Melanie Barwick Consulting
- NHMRC
- NHS Education for Scotland: Knowledge Network
- NHS England
- Ontario Centre of Excellence for Child & Youth Mental Health
- Public Health Agency of Canada

- RE-AIM
- Royal Society for Public Health
- UNeMed
- What Works Wellbeing

- Knowledge Translation guides
- Knowledge Translation Planner
- Communicating your research
- Research Impact Framework
- Knowledge translation tools
- Research Impact
- Knowledge into Action Toolkit

- Impact Framework
- Knowledge Mobilization Toolkit

- Knowledge Translation Planning Primer
- RE-AIM Planning Tool
- Impact Pathways
- Inventor Handbook
- How to measure your impact on wellbeing

Arts

- Arts Council
- Arts & Humanities Research Council
- The Impact Field Guide & Toolkit

- Measuring Outcomes
- Understanding your project
- The Impact Field Guide & Toolkit

Social sciences

- Economic and Social Research Council
- Overseas Development Institute

- Impact Toolkit
- Tools for Policy Impact

STEM

- Advancing Research in Society

- COSEE Networked Ocean World
- CSIRO
- Ontario Ministry of Agriculture, Food & Rural Affairs
- Royal Society of Chemistry

- Science Foundation Ireland

- Broader Impacts Guiding Principles
- Broader Impact Wizard
- Impact Evaluation Guide
- Knowledge Translation and Transfer Plan
- What is research impact and why does it matter? Workbook
- Research Impact

Broader

- Better evaluation
- Campus Engage

- Emerald
- Fast Track Impact
- Heritage Fund

- Inspiring impact
- Kudos
- MacQuarie University Commercialisation and Innovation
- NCVO
- Nesta
- Ryerson University
- Social Impact Toolbox
- Social Innovation Factory
- Social Value UK

- UK Parliament

- University of Bath
- University of Cambridge
- University of Sheffield

- Impact evaluation
- Engaged Research Planning for Impact
- Impact Literacy Workbook
- Impact Planning Template
- Good practice guidance: evaluation
- Inspiring Impact
- What is Research Mobilization?
- Impact Canvas

- Impact guide
- DIY Toolkit
- Knowledge Mobilization
- Frameworks
- Impact Wizard
- A Guide to Social Return on Investment
- Research impact at the UK Parliament
- Planning for Impact Toolkit
- Pathways to Impact
- Impact Planning Toolkit

RESOURCE DASHBOARD: HEALTH

PAGE	TOOL	PLAN	DELIVER	ASSESS	BEST SUITED TO
23	Knowledge Translation guides	●			Researchers seeking health impacts
24	Knowledge Translation Planner	●	●	●	Researchers looking for an introductory guide to knowledge translation
25	Communicating your research: a toolkit	●	●	●	Researchers seeking health impacts
26	Research Impact Framework	●			Researchers seeking an introduction to impact within a health field
27	Knowledge translation tools	●	●	●	Researchers seeking health impacts
28	Research Impact	●	●		Researchers interested in commercialisation within healthcare
29	Knowledge into Action Toolkit		●		Researchers seeking to understand how to mobilise knowledge
30	Impact Framework	●			Researchers seeking health impacts, and/or who have identified specific impacts
31	Knowledge Mobilization Toolkit	●	●	●	Researchers looking for an end-to-end introduction to knowledge mobilisation
32	Knowledge Translation Planning Primer	●	●	●	Researchers seeking to build a clear and considered engagement strategy
33	RE-AIM Planning Tool	●	●		Researchers planning health interventions
34	Impact Pathways	●		●	Researchers focused on the defined public health challenges
35	Inventor Handbook		●		Researchers interested in commercialisation
36	How to measure your impact on wellbeing	●			Research which has a focus on, or expected benefits for wellbeing

RESOURCE DASHBOARD: ARTS

PAGE	TOOL	PLAN	DELIVER	ASSESS	BEST SUITED TO
37	Measuring outcomes			●	Researchers seeking learning and/or social outcomes
38	Understanding your project	●		●	Researchers assessing impact of arts/ humanities
39	The Impact Field Guide & Toolkit	●	●	●	Researchers wanting a straightforward introduction to impact; those using film to create impact

RESOURCE DASHBOARD: SOCIAL SCIENCES

PAGE	TOOL	PLAN	DELIVER	ASSESS	BEST SUITED TO
40	Impact Toolkit	●	●	●	Researchers within social sciences
41	Tools for Policy Impact	●	●	●	Researchers seeking to influence policy/ practice; those new to impact

RESOURCE DASHBOARD: STEM

PAGE	TOOL	PLAN	DELIVER	ASSESS	BEST SUITED TO
42	Broader Impacts Guiding Principles	●			Researchers seeking broad principles of impact
43	Broader Impact Wizard	●			Researchers working in science, or wanting an interactive planning tool
44	Impact Evaluation Guide			●	Researchers wanting to understand funder priorities/ perspectives
45	Knowledge Translation and Transfer Plan	●			Research where knowledge can be transferred, such as that with a clear audience
46	What is research impact and why does it matter? Workbook	●			Researchers seeking a general introduction to research impact
47	Research Impact	●			Researchers new to impact or seeking guidance on planning/ reporting

RESOURCE DASHBOARD: BROADER

PAGE	TOOL	PLAN	DELIVER	ASSESS	BEST SUITED TO
48	Impact evaluation	●		●	Research focused on community or large-scale impact
49	Engaged Research Planning for Impact	●			Researchers seeking example indicators of impact categories
50	Impact Literacy Workbook	●	●	●	Researchers wanting to take a systematic approach to impact planning
51	Impact Planning Template	●			Researchers needing support to identify potential impacts and beneficiaries
52	Good practice guidance: evaluation	●		●	Those with a clear pathway from research, through outputs and towards impact
53	Inspiring Impact	●	●	●	Researchers new to impact; or those seeking specific social impacts
54	What is Research Mobilization?	●			Researchers brand new to impact
55	Impact Canvas	●			Researchers familiar with impact; those seeking tangible impacts
56	Impact guide	●	●	●	Research that seeks social impacts, involving different stakeholders
57	DIY Toolkit	●	●		Researchers looking for tools to help with specific impact planning aspects
58	Knowledge Mobilization		●		Researchers planning activities for delivering impact
59	Frameworks	●		●	Research that seeks social impacts, involving different stakeholders
60	Impact Wizard	●	●	●	Researchers working on social cohesion, ecology or education projects
61	A Guide to Social Return on Investment	●		●	Research seeking social impacts and/or needing to calculate SROI/ cost-benefit

RESOURCE DASHBOARD: BROADER

PAGE	TOOL	PLAN	DELIVER	ASSESS	BEST SUITED TO
62	Research impact at the UK Parliament	🔵			Researchers who are pursuing policy impact
63	Planning for Impact Toolkit	🔵	🟡	🟢	Researchers starting out with their impact planning
64	Pathways to Impact	🔵			Researchers brand new to impact
65	Impact Planning Toolkit	🔵	🟡	🟢	Researchers brand new to impact

Knowledge Translation guides

https://cihr-irsc.gc.ca/e/29529.html

Canadian Institutes of Health Research (CIHR)

Health

Planning ✓

Delivery

Assessment

SUMMARY

The CIHR website includes a section on knowledge translation, which it describes as 'A dynamic and iterative process that includes synthesis, dissemination, exchange and ethically-sound application of knowledge to improve the health of Canadians'. The 'Learning' section includes KT basics and primers, covering priority setting, identifying implementations, evidence-based decision making and a guide to translation planning, the latter containing useful information about how to articulate the research question, approach, feasibility, outcomes and impact of a research project. The Primer defines knowledge translation, sets out a process for knowledge to action and explains how to put that process into practice. Further links and resources are provided throughout. There are also tips for involving users in the research process.

STRENGTHS

- Introductory information on knowledge translation from a funder perspective
- Links to conceptual underpinnings are included
- Includes guide to articulating the research question, approach, feasibility and outcomes of a research project.
- Includes tips to involve users in the research process.

LIMITATIONS

- Focus on knowledge translation rather than impact
- Informative rather than interactive

APPLICATION

Best suited to:
Researchers seeking health impacts

Less suitable for:
Researchers in other domains; those needing a detailed and/or interactive guide to impact planning

Keywords: *Health | Planning | Health interventions | Funder perspective*

Knowledge Translation Planner

https://www.canada.ca/en/health-canada/corporate/about-health-canada/reports-publications/grants-contributions/knowledge-transfer-planner.html#intro

Health Canada

Health

Planning ✓
Delivery ✓
Assessment ✓
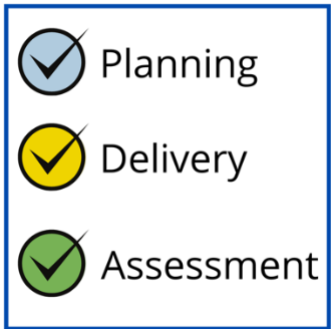
SUMMARY

This planner covers the knowledge translation (KT) process in four sections: (a) Knowledge to Action model (the process of developing, disseminating and implementing knowledge); (b) planning for knowledge dissemination and implementation; (c) useful resources; and (d) references. The Knowledge to Action (KTA) model is then broken down into seven phases: (1) identifying need; (2) adapting knowledge to local context; (3) identifying barriers and facilitators to select appropriate KT strategies; (4) tailoring and implementing KT strategies; (5) monitoring knowledge use; (6) evaluating outcomes; and (7) sustaining knowledge use. Each is accompanied by details of what the phase consists of. In section 2 these phases are broken down into relevant activities to support engagement, dissemination and implementation. There is an associated worksheet which provides space for the user to complete their own KT plan, based on the phases outlined in the planner.

STRENGTHS

- Provides structured approach to planning KT, built around the Knowledge to Action model
- Describes seven phases within the model, describing steps and tips for each
- Includes downloadable worksheet for users to complete their own plan
- Links to further resources
- Contains glossary of terms

LIMITATIONS

- Focused on health research, although broadly applicable across other disciplines
- Introductory rather than detailed planner

APPLICATION

Best suited to: Researchers looking for an introductory guide to knowledge translation

Less suitable for: Researchers seeking more detailed information

Keywords: *Health | Planning | Delivery | Assessment | Evaluation | Templates*

Communicating your research: a toolkit

https://www.health.org.uk/publications/communicating-your-research-a-toolkit

The Health Foundation

Health

SUMMARY

This resource has been designed by the independent UK charity committed to bringing about better health and health care. The objectives of the toolkit are to help users understand how to plan and focus communications activities on where they can make the most impact; adapt and present findings to engage different audiences; and understand how to engage key audiences to achieve impact on policy and practice. The toolkit is divided into four sections: planning for impact; communicating research results; extending influence and widening impact; and a glossary of terms. Section 1 provides a broad introduction, including a funder perspective on research communications, and guides the user through identifying and prioritising audiences and communications channels, including engagement events. Section 2 looks at creating messages and presentations, as well as working with the media. Section 3 moves towards demonstrating impact and influencing audiences, as well as communicating with the public, and includes information on measures to collect to evidence impact. Section 4 provides a glossary of terms with succinct definitions. Templates, tips, examples and links to further information are provided throughout. Each section is provided online and as a downloadable pdf. The site also provides an accompanying Communications in Healthcare Improvement Toolkit, in a similar format.

STRENGTHS

- Toolkit focusing on three stages of communicating health care research: planning; communicating; influencing
- Easy to follow format with options to read online or as downloadable pdf
- Glossary of terms
- Includes information on identifying and prioritising stakeholders
- Includes communications strategies and tools
- Includes information on influencing policy and practice
- Provides templates for each section
- Links to further information, examples and tips throughout

LIMITATIONS

- Focused on health research, although broadly applicable across other disciplines
- Focused on communicating research

APPLICATION

Best suited to:
Researchers seeking health impacts

Less suitable for:
Researchers seeking other types of impact (eg. environmental or, economic)

Keywords: *Health | Planning | Delivery | Assessment | Evaluation | Templates | Policy | Stakeholders | Communication | Funder perspective*

Research impact framework

https://www.macmillan.org.uk/about-us/what-we-do/evidence/research-funding/research-with-impact.html

Macmillan Cancer Support

Health

SUMMARY

A downloadable research impact framework created by the UK cancer charity to help maximise the impact of research that Macmillan funds. The framework covers what impact is and why it's important, framework principles (broadly covering how the researcher will work with Macmillan), theory of change, impact planning and impact monitoring. The theory of change is used to identify the contribution of individual projects to the overall goals of the charity, and examples are included to help users articulate their projects. Impact planning covers three areas: setting long-term aims or outcomes for research impact; mapping routes to impact (eg. influencing policy or service design) and identifying impact-enabling activities (social media; training materials; submissions to policy consultations, etc.).

STRENGTHS

- Introductory guide to impact planning
- Includes examples of routes to impact
- Includes examples of impact-enabling activities
- Based on Theory of Change

LIMITATIONS

- Introductory rather than detailed information
- Focus on contributions to Macmillan outcomes, rather than more broadly

APPLICATION

Best suited to: Researchers seeking an introduction to impact within a health field

Less suitable for: Researchers with more advanced knowledge, or seeking impact other than policy or service design

Keywords: Health | Planning | Delivery | Theory of Change

Knowledge translation tools

http://melaniebarwick.com/knowledge-translation-tools/

Melanie Barwick Consulting

Health

☑ Planning
☑ Delivery
☑ Assessment

SUMMARY

Melanie Barwick Consulting provides resources developed for the Sick Kids' Research Institute in Canada. The website contains a suite of knowledge translation tools. For example, the Knowledge Translation Planning Template sets out questions for the user to consider across 13 elements: project partners; project engagement; partner roles; KT expertise; knowledge users; main messages; KT goals; KT strategies; KT process; KT evaluation; resources; budget; and procedures. Many of the categories provide examples. The Knowledge Translation Plan Appraisal Tool (available as a download), aimed at grant reviewers but also usable by individual researchers, looks at three criteria that make up a quality knowledge translation plan: comprehensiveness (covering the 13 elements of the KT planning template); alignment with core KT planning elements (intended audience/ beneficiaries; main messages; KT goals; KT strategies to achieve those goals; indicators to evidence that each KT goal was achieved); and feasibility, in terms of research aims, timeline and resources. The template provides a form for reviewers/ individuals to assess each element of the KT plan. The website also offers games in both KT and implementation, although both have a fee attached.

STRENGTHS

- Range of resources on knowledge translation
- Includes templates for individuals to plan their knowledge translation
- Templates include questions to help individuals consider 13 different elements of knowledge translation
- Provides guidance for grant reviewers

LIMITATIONS

- Focused on health research, although broadly applicable across other disciplines

APPLICATION

Best suited to: Researchers seeking health impacts

Less suitable for: Researchers seeking other types of impact (eg. environmental, economic)

Keywords: *Health | Planning | Delivery | Assessment | Evaluation | Templates | Funder perspective*

Research impact

National Health and Medical Research Council for Australia

Health

Planning ✓

Delivery ✓

Assessment
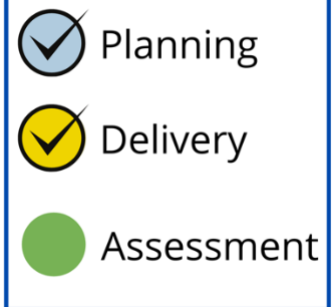
SUMMARY

A guide to research impact, covering the types of impact recognised by the National Health and Medical Research Council for Australia (knowledge, health, economic and social), examples, and the benefits of research impact. The website also includes a guide to understanding Intellectual Property, engaging with industry end-users and undertaking commercialisation activities. It identifies 5 principles of commercialisation: 1) identifying an unmet need; 2) demonstrating proof of concept; 3) protecting the asset (where assets are molecules, vaccines, formulations, medical devices, etc.); 4) establishing strategic partners; 5) creating impact.

STRENGTHS

- Introductory guide to types and examples of impact
- Additional guide to commercialisation, based on 5 principles
- Health focused

LIMITATIONS

- Introductory rather than detailed information
- Focus on commercialisation
- Informative, rather than interactive
- Focus on commercialisation reflects one type of impact route

APPLICATION

Best suited to: Researchers interested in commercialisation within healthcare

Less suitable for: Researchers seeking non-commercial impacts, or operating via non-commercial routes to use

Keywords: *Health | Planning | Delivery | Commercialisation*

Knowledge into Action Toolkit

http://www.knowledge.scot.nhs.uk/k2atoolkit.aspx

NHS Education for Scotland

Health

Planning
Delivery ✓
Assessment

SUMMARY

This guide has been produced by the Knowledge Network, part of NHS Education for Scotland - mainly for librarians and other knowledge brokers – to support staff to use knowledge to inform their practice. It provides information and links for building capacity and capability; coordinating and connecting with people; sourcing and summarising knowledge; sharing knowledge; and making knowledge usable in context. These sections include factsheets, workbooks and examples of different approaches to impact. For example, there is a section on the use of mobile apps in clinical decision-making, with a case study and an opportunity to reflect on their application/ benefit in different settings. The tools for presenting knowledge contain a short description and links to full details (examples include creative storyboarding, data visualisation tools and infographic tools). There are also links to further resources, including gathering and using evidence.

STRENGTHS

- Focuses on communication and skills development
- Covers people aspect (building capacity and capability; coordinating and connecting with people), effective communication (sourcing and summarising knowledge; sharing knowledge) and tailoring for specific situations (making knowledge usable in context).
- Information on the application of different outputs in clinical settings, tools for presenting knowledge, and gathering & using evidence
- Links to additional resources

LIMITATIONS

- Focus on knowledge brokerage rather than research impact
- Focus on health-related knowledge

APPLICATION

Best suited to:
Researchers seeking to understand how to mobilise knowledge

Less suitable for:
Researchers in other domains; those needing a detailed and/or interactive guide to impact planning

Keywords: *Health | Planning | Health interventions | Communications*

Impact framework

https://www.england.nhs.uk/sustainableimprovement/impact-framework/

NHS England

Health

Planning ✓
Delivery
Assessment

SUMMARY

Based on sustainable improvement, the NHS Impact Framework can be applied to research impact. The framework incorporates 4 basic steps – 1) articulating what will change, how and why; 2) capturing output and outcome measures; 3) reviewing the evidence; and 4) sharing your impact with others – all structured around a theory of change. Each step is explained in detail (supplemented with an animated video) and the framework contains templates and worked examples to help create a plan. Links to further information are also included.

STRENGTHS

- High level overview of the broad stages of impact
- Structured around a theory of change
- Each step is described in detail, supported by animations
- Includes templates for each step

LIMITATIONS

- Focus on impact of sustainable improvements in NHS rather than research (although concepts can be easily transferred)

APPLICATION

Best suited to: Researchers seeking health impacts, and/or who know the specific impacts they are seeking to achieve

Less suitable for: Researchers who require a more structured support tool for impact

Keywords: *Health | Planning | Health interventions | Theory of change | Templates*

Knowledge Mobilization Toolkit

http://www.kmbtoolkit.ca/the-toolkit

Ontario Centre of Excellence for Child & Mental Health

Health

Planning ✓
Delivery ✓
Assessment ✓

SUMMARY

This toolkit, designed for the Ontario organisation supporting child and youth mental health agencies, communities and decision makers, begins with a definition of knowledge mobilisation – 'making evidence accessible, understandable and useful for knowledge users' – and its benefits. The toolkit itself is divided into three areas. 'Planning' is focused on getting users started, by identifying key messages, the purpose of knowledge mobilisation, who is involved in sharing the information, who the information is being shared with, and how and when the sharing will take place. A set of key questions is also included – what, why, who, how, when and measure. 'Doing' focuses on sharing the knowledge with specific audiences, asking questions about who the audience is, what are their interests and needs, who are the researchers, partners and supporters, what terms, concepts and language do the audience understand, and what communication form will be best for them. More information is included for three strategies for doing knowledge mobilisation: products; events; and networks, with examples for each. Key considerations include offer more; actively engage; keep it real; reach out; and think big. The final section 'Evaluating' includes a definition of evaluation and then sets out seven steps, from defining the purpose and parameters of the evaluation to collecting, analysing and interpreting data before using and communicating results, with a link to knowledge translation methods and tools for public health. The toolkit includes a downloadable knowledge mobilisation planning form and each section also contains links to cases studies, additional tools and resources.

STRENGTHS

- Toolkit detailing the three impact phases: planning, delivery and assessment
- Each phase contains steps and questions to help users develop a knowledge mobilisation plan
- Defines knowledge mobilisation and its benefits
- Includes examples of 'doing' knowledge mobilisation: products, events and networks
- Includes a downloadable knowledge mobilisation planning form
- Includes links to additional tools, case studies and other resources

LIMITATIONS

- Focused on health research, although broadly applicable across disciplines
- Introductory guide, rather than detailed
- Focuses on knowledge mobilisation rather than impact

APPLICATION

Best suited to: Researchers looking for an end-to-end introduction to knowledge mobilisation

Less suitable for: Researchers looking for detailed guidance

Keywords: *Health | Planning | Delivery | Assessment | Evaluation | Templates |*

Knowledge Translation Planning Primer

Public Health Agency of Canada

Health

Planning ✓

Delivery ✓

Assessment ✓

SUMMARY

This user guide developed by the Public Health Agency of Canada provides guidance on knowledge translation (KT) planning, along with a worksheet that can be completed for each audience. Sections cover who the intended audience is, what the KT objectives are, what the main message is, the format and delivery of the KT activities, the opportunities and barriers, and resources. Questions are included in each area, to prompt thinking, as well as tips to aid planning. There is a defined section on assessing impact, with questions including how to monitor/ evaluate the reach and use of the knowledge, whether the audience has been reached and objectives met. The appendices provide further information, specifically related to identifying the main messages, different methods of knowledge translation, and impact indicators (some of which are more focused on dissemination). Appendix two outlines the concept of 'sticky ideas', or the art of making ideas unforgettable, as a practical tool for effective communication. The tool is based on 6 principles: simplicity, unexpectedness, concreteness, credibility, emotions, and story.

STRENGTHS

- Provides structured approach to planning engagement
- Includes outline of 'sticky ideas' concept, providing a new perspective on effective communication
- Outlines different methods of KT

LIMITATIONS

- Focused on health research, although broadly applicable across other disciplines
- Suggested indicators are limited (numeric only)

APPLICATION

Best suited to: Researchers seeking to build a clear and considered engagement strategy

Less suitable for: Researchers seeking support for impact beyond engagement

Keywords: *Health | Planning | Delivery | Assessment | Evaluation | Communications | Stakeholders*

RE-AIM Planning Tool

https://www.re-aim.org/resources-and-tools/

RE-AIM

Health

Planning

Delivery

Assessment
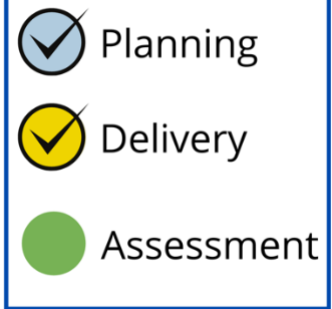
SUMMARY

RE-AIM is a US-based working group of health academics, focused on health behaviour interventions. The acronym stands for reach, effectiveness, adoption, implementation, and maintenance. The Planning Tool is a series of 'thought questions' to help researchers think through the different parts of a health intervention, which at the same time can be applied more generally to a research project. For example, 'reach' questions could help to identify the audience for research impact and the proportion of a target audience that the research is likely to reach, as well as barriers. 'Effectiveness' encourages researchers to think about the specific benefits of their research and to identify measures of success and potential unintended consequences. Questions in the 'maintenance' section are broken down into individual and community sustainability. The website includes a range of information for each of the 5 elements, including tips, further reading, checklists and a tool for dissemination.

STRENGTHS

- The guide is aimed at health interventions, but the information can be applied across disciplines/ types of research project
- Built around 5 core elements: reach, effectiveness, adoption, implementation and maintenance
- Includes range of information for each element based on a series of 'thought questions' to prompt consideration
- Planning tools and checklists

LIMITATIONS

- Focus on health behaviour interventions
- Informative rather than interactive

APPLICATION

Best suited to:
Researchers planning health interventions; those looking for a suite of questions to prompt their impact thinking

Less suitable for:
Researchers looking for a step-by-step guide to impact planning

Keywords: *Health | Planning | Delivery | Health interventions*

Impact pathways

https://www.rsph.org.uk/our-work/policy/wider-public-health-workforce/measuring-public-health-impact.html

Royal Society for Public Health

Health

Planning ✓
Delivery ●
Assessment ✓

SUMMARY

This independent health charity offers support and guidance to key healthcare profession to help them measure the public health impacts of everyday interventions. The website includes 11 'impact pathways', each one focused on a specific public health challenge: adult obesity; alcohol; smoking and tobacco; dementia; falls; mental health; child oral health; healthy beginnings; childhood obesity; sexual health; and physical activity. Each downloadable pathway sets out 4 stages: 'do', to identify different types of everyday intervention; 'record' to identify what should be recorded; 'collate', bringing together different interventions (where relevant); and 'impact', identifying the potential impacts. Each pathway also has further linked information. For example, the 'falls' pathway has links to the falls risk assessment on the NICE website as well as information on mortality rates for accidental falls, on NHS Digital. While the tool isn't aimed at researchers specifically, the information provided could be easily applied to researchers working within these public health areas.

STRENGTHS

- Structured by areas of health, with impact support tailored to each topic area
- Covers 11 public health challenges
- Links to further information to support each element of the pathway

LIMITATIONS

- Focuses on specific public health challenges
- Not restricted to research impact

APPLICATION

Best suited to:
Researchers focused on the defined public health challenges

Less suitable for:
Researchers working in other disciplines/with other foci

Keywords: *Health | Public Health | Planning |*

Inventor Handbook

University Nebraska Medical Centre: Tech Transfer for Nebraska

Health

Planning
✓ Delivery
Assessment

SUMMARY

This guide to technology transfer has been prepared by the technology transfer and commercialisation office of the University Nebraska Medical Center, the University of Nebraska at Omaha and Nebraska Medicine, to answer the most common questions and to provide a broad overview of the tech transfer process. The guide includes a definition of tech transfer ('the act of moving innovation and discoveries into the world for the benefit of all) and lists the benefits of tech transfer (including positive impact on society) before describing the process, from innovation, through disclosure, evaluation, protection, marketing, licensing and commercialisation. Each step in the process is described in further detail. The guide also looks at agreements, conflicts of interest and other considerations, including start-ups.

STRENGTHS

- Focus on technology transfer and commercialisation as part of delivering impact
- Sets out a clear process for technology transfer, across 7 steps
- Each step is described in further detail
- Include agreements and information about conflicts of interest
- Specific information about start-ups

LIMITATIONS

- Focus on technology transfer and commercialisation
- Focus on transfer is simplistic compared to broader drives to mobilise or co-produce impact

APPLICATION

Best suited to: Researchers interested in commercialisation

Less suitable for: Research with a less clear route to use, or more requiring of coproduction

Keywords: *Health | Delivery | Commercialisation*

How to measure your impact on wellbeing

https://measure.whatworkswellbeing.org/

What works well

Health

SUMMARY

This resource focuses on how to measure wellbeing, which reflects how individuals feel and experience life, in terms of aspects such as quality of life, physical and mental health, and relationships with the community. The website guides those seeking to measure wellbeing through a sequence of information, guidance and self reflection. Starting with an introduction and definition about wellbeing, site visitors are then navigated to pages on how to measure wellbeing, with guidance on selecting subjective and objective measurements. The next section delves more deeply into how to approach the measurement of wellbeing, particularly in terms of considering the purpose of measurement ('why measure it'), creative approaches such as arts-based assessments, survey timings, and considerations for who delivers what questions and how. The site then provides a set of recommended questions derived from robust and reputed question banks, such as the Office for National Statistics, and covers possible questions for wellbeing, social capital, loneliness and more domain specific questions. Further guidance is given on writing new questions, and open questions, and the site includes a survey builder tool. Finally, guidance is given on how to analyse and use the results.

STRENGTHS

- Deep analysis of individual wellbeing
- Advocates mix of objective and subjective measures to get a fuller picture and differentiates between overall and specific levels of analysis.
- Discusses how to measure impact on communities or social relationships, explaining social capital and community wellbeing
- Express consideration of who should ask questions, when and how
- Includes creative approaches to measuring wellbeing
- Provides recommended questions for measuring wellbeing, but supports the process of creating new questions
- Includes a survey builder
- Explains how to analyse and use the data for evaluation
- Draws on existing strong and reliable resources, such as the ONS
- Focuses on purpose, tailoring and interaction, not just results and methods.
- Considers tailoring, acceptability, suitability and values

LIMITATIONS

- Focuses on wellbeing only

APPLICATION

Best suited to: Research which has a focus on, or expected benefits for wellbeing at the individual or community levels.

Less suitable for: Research pursuing effects not related directly to people, such as economic, environmental or commercial impacts.

Keywords: *Health | Assessment | Evaluation | Subjective | Objective | Creative | Wellbeing | Measurement*

Measuring outcomes

https://www.artscouncil.org.uk/measuring-outcomes

Arts Council

Arts

SUMMARY

The Arts Council has produced this guide to evidencing the impact of activities as part of the Inspiring Learning for All framework. Whilst this has been developed within the arts community, it is applicable to other areas. By defining either outcomes (learning or social outcomes), researchers can gather appropriate evidence that will demonstrate impact. Learning outcomes include skills; knowledge and understanding; attitudes and values; enjoyment, inspiration, creativity; and behaviour & progression. Social outcomes include health & wellbeing outcomes; stronger & safer communities; and strengthening public life. The guide sets out a 9-stage plan for evidence gathering, starting with objective setting and including reviewing existing data, research tools and methods, data analysis and presenting the evidence. Data tools explore the differences between quantitative and qualitative tools and where each might be beneficial. The tools and templates section includes a researcher question bank, tips on recording and analysing both qualitative and quantitative data, and template spreadsheets for both types of analysis, as well as guides to advocacy planning and running a group exercise. The website also includes an 'impact and insight toolkit', but this is only available for arts and cultural organisations (registration required).

STRENGTHS

- Strong focus on gathering evidence of impact of activities
- Information, guidance and templates on gathering, recording and analysing both quantitative and qualitative data
- Clear descriptions of learning and social outcomes, that can be adapted for use
- Practical tools: guides and downloadable templates for different aspects of the evidence gathering and analysis phases

LIMITATIONS

- Focus is on two core areas: learning and social outcomes
- Focus is also on evidence gathering and analysis, rather than other impact phases
- Created from an Arts perspective
- Some aspects restricted to Arts organisations

APPLICATION

Best suited to: Researchers seeking learning and/or social outcomes

Less suitable for: Researchers not seeking learning and/or social outcomes, or those without an arts affiliation

Keywords: *Arts | Assessment | Evaluation | Evidence | Data | Analysis | Templates*

Understanding your project

Arts & Humanities Research Council

Arts

✓ Planning	
● Delivery	
✓ Assessment	

SUMMARY

While this guide by the AHRC focuses on self-evaluation across the whole of the research cycle, the downloadable guide provides guidance on how to plan a programme or project based around a logic model (template provided). The model encourages users to think through what resources and actions are needed to reach intended results (or impacts), with a focus on language that describes the changes/ benefits that will occur as a result of the research, as well as who the likely beneficiaries will be. Detailed information on data gathering is included (quantitative and qualitative), as well as tips on how to structure quantitative surveys, and how to record and analyse data. All this is used to feed into the evaluation, built around the Kirkpatrick Model of 4 levels of potential impact (reaction, learning, behaviour, results). The website also includes a guide for engaging with policymakers, covering planning the engagement, demonstrating the extent of engagement and ways to increase likely impact. To help summarise key aspects of the research to impact journey, the guide includes a useful table bringing together examples of resources, activities, outputs, outcomes and impacts.

STRENGTHS

- Strong focus on evaluating impact
- Information on gathering, recording and analysing both quantitative and qualitative data
- Focus on the language of change: what will change, and for whom?
- Based on the Kirkpatrick model of impact
- Separate guide for engaging with policymakers

LIMITATIONS

- Focus on arts and humanities research
- Spotlight on evaluation, rather than other impact phases

APPLICATION

Best suited to:
Researchers assessing impact of arts/ humanities

Less suitable for:
Researchers new to impact; researchers working in other domains

Keywords: *Arts | Planning | Assessment | Evaluation | Evidence | Data | Analysis | Policy*

The Impact Field Guide & Toolkit

https://impactguide.org/introduction/welcome/

The Impact Field Guide & Toolkit

Arts

Planning ✓
Delivery ✓
Assessment ✓

SUMMARY

This guide has been produced for a non-profit foundation working to support the global community of documentary filmmakers. Whilst this focus is very specific, the guide contains useful information that can be applied in different domains. The guide is interactive, supporting users through the different phases of the impact process, from planning through delivery to assessment. In the planning section, information is included on how to define your mission and develop a strategy, built around 'four impact dynamics': changing minds; changing structures; building community; and changing behaviours. A worksheet template is provided. Impact in action provides information on practical steps to deliver impact, including building partnerships (stakeholder identification and management), facilitating dialogue, lobbying, and building publicity campaigns. In Measuring Impact, the focus switches to identifying and collecting appropriate evidence, and includes an 'evaluation toolbox' that maps indicators and tools to the four impact dynamics. There are links to further resources throughout.

STRENGTHS

- Step-by-step guide through all phases of the impact process
- Identifies 4 impact dynamics – changing minds, changing structures, building community, and changing behaviours – and uses these to structure the impact plan and measure impact
- Includes evaluation toolbox – set of indicators and related tools
- Worksheets and templates provided
- Links to further information throughout

LIMITATIONS

- Focus on documentary filmmakers

APPLICATION

Best suited to: Researchers wanting a straightforward introduction to impact; those using film to create impact

Less suitable for: Researchers working outside of media or awareness raising activities

Keywords: *Arts | Planning | Delivery |Assessment | Evaluation | Evidence | Film | Templates | PR & Publicity | Interactive*

Impact toolkit

Economic and Social Research Council UK

Social sciences

✓ Planning	
✓ Delivery	
✓ Assessment	

SUMMARY

A guide for researchers developed by ESRC, providing information on the definition of impact, support for making an impact and communications tools. Definitions of impact include both academic and economic/ societal impacts that can be instrumental, conceptual and/ or capacity building. The page identifies the links between impact and knowledge exchange and the opportunities created for impact by collaborative research, along with other factors that support impact. Support for making an impact includes information on media training, public engagement, tips for doing knowledge exchange, guidance for collaboration, getting support from the research organisation, and commercialisation. The 'tips for doing knowledge exchange' section includes information about stakeholder mapping and the theory of change, as well as further information on building contacts, developing relationships and evaluating knowledge exchange. Guidance is given on developing a communications and impact strategy, branding, event organisation, media relations, influencing policymakers, publications, and best practice guidance for social media and websites. This is accompanied by a template for communications and step by step guide to build an impact strategy and measuring success. Further information is provided about planning, setting up, running, and evaluating events to generate impact.

STRENGTHS

- Step-by-step guide to the impact process
- Particular focus on knowledge exchange, through communications tools and engagement
- Links to additional resources throughout
- Template provided for a communications and impact strategy
- Detailed information on delivery of research impact (events, media, policymakers, social media, etc).
- Contains information on evaluating the success of the impact activities

LIMITATIONS

- Aimed at researchers applying to ESRC for funding
- Limited information in relation to impact beyond social sciences
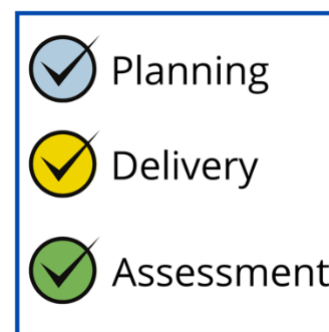
APPLICATION

Best suited to: Researchers within social sciences

Less suitable for: Researchers outside of social research

Keywords: *Social sciences | Planning | Delivery | Assessment | Theory of Change | Communications | Commercialisation | Policy | Engagement | Stakeholders*

Tools for policy impact: a handbook for researchers and REF impact toolkit

https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/194.pdf and
https://www.odi.org/sites/odi.org.uk/files/resource-documents/12144.pdf

Overseas Development Institute

Social sciences

SUMMARY

Overseas Development Institute (ODI) has two relevant guides for research impact. The first, Tools for Policy Impact, outlines a series of tools that can be used to support turning research into policy. The focus is on international development policy, but the tools are broadly applicable to other areas of activity. Tools cover research, context assessment, communication and policy influence. In the latter, there is a link to a self-assessment questionnaire for researchers to find out which style of 'policy entrepreneur' they are, as well as guidelines on writing effective policy briefs. The resource also includes a detailed list of resources to support activities such as lobbying, advocacy and communicating research online. The second guide, REF impact toolkit, contains a useful step-by-step guide to help researchers think about how to monitor and improve their research impact. The information is presented across 6 modules, covering understanding impact, identifying impact objectives, stakeholder mapping, developing a theory of change, communicating research and monitoring progress. Each section includes take-aways and tasks, to help researchers relate the concepts to their specific research projects/ contexts. For example, the task for 'identifying impact objectives' involves researchers asking themselves 7 questions, starting from the research question and working through to what they would like to point to, to indicate that the research has made a difference. There is a list of example outputs, channels and activities through which research can be communicated, from written and digital tools to events, meetings and multimedia, as well as tips for presenting research in different formats.

STRENGTHS

- Step-by-step guides to the impact process
- Interactive tasks to prompt researchers to apply concepts to their specific research project
- Links to further resources
- Covers all parts of the impact process, from planning through delivery to evaluation
- Information on communicating research
- Applicable across different disciplines

LIMITATIONS

- Focuses on research with policy/ practice outcomes

APPLICATION

Best suited to: Researchers seeking to influence policy/ practice; those new to impact
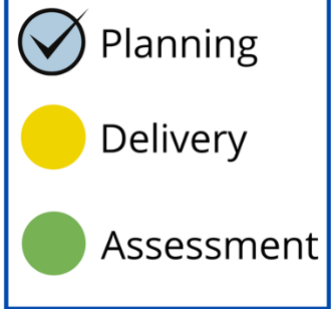
Less suitable for: Researchers not seeking policy/ practice impacts

Keywords: *Social sciences | Planning | Delivery | Assessment | Evaluation | Interactive | Theory of change | Policy | Communication*

Broader Impacts guiding principles

https://www.researchinsociety.org/guiding-principles

Advancing Research Impact in Society (ARIS)

STEM

SUMMARY

A short, downloadable guide to the US National Science Foundation Broader Impact statement, produced by ARIS, an organisation funded by the NSF to work with scientists and engagement practitioners to build capacity, advance scholarship, grow partnerships and provide resources to help them engage with and demonstrate the impact of research in their communities and society. The guide contains the guiding principles behind the Broader Impact statement. It also contains types of impact, and a set of questions that could be used to help researchers in any discipline/ location to plan their impact. Relevant questions explore the potential for impact, the types of activity to reach potential beneficiaries, the need for this impact, and how the outcomes and impacts will be measured.

STRENGTHS

- Poses questions relevant to research impact in any discipline/ location
- Defines set of broader impacts

LIMITATIONS

- Focus is on preparing for the US National Science Foundation's Broader Impact statement for funding
- Guiding principles rather than structured support tool

APPLICATION

Best suited to: Researchers seeking broad principles of impact

Less suitable for: Researchers requiring a more structured support tool

Keywords: *STEM | Planning |*

Broader Impact Wizard

https://coseenow.net/wizard/

Centres for Ocean Sciences Education Excellence (COSEE) Networked Ocean World

STEM

Planning ✓

Delivery

Assessment

SUMMARY

An online planning tool to help researchers in marine science demonstrate the importance of the broader impact of their research, based on the US National Science Foundation funding criteria. While specific, the general principles (5-step process) are broadly applicable, including audience; budget; activities; project description; and evaluation. An introductory video takes users through the process, illustrated with relevant examples from active researchers/ reviewers. There is also a worked example. Within the wizard itself (which can be accessed by setting up an account), users can enter information about each of the 5 steps in order to create a plan. Further information is provided for some steps, including additional video resources and definitions (audience/ evaluation) and a tool for developing SMART goals and objectives (project description). This information is then used to generate a summary plan.

STRENGTHS

- Easy-to-follow 5 step process
- Considerations include audience, budget, activities, project description and evaluation
- Interactive, online tool to capture information
- Includes worked examples, definitions and video resources

LIMITATIONS

- Focus is on preparing for the US National Science Foundation's Broader Impact statement for funding
- Examples are focused on marine science
- Introductory, rather than detailed, guide

APPLICATION

Best suited to: Researchers working in science, or wanting an interactive planning tool

Less suitable for: Researchers outside of science, or seeking more general guide to impact planning

Keywords: *STEM | Planning | Interactive*

Impact evaluation guide

https://www.csiro.au/en/About/Our-impact/Evaluating-our-impact

Commonwealth Scientific and Industrial Research Organisation

STEM

Planning

Delivery

Assessment

SUMMARY

An updated guide (Feb 2020) produced by CSIRO, Australia's National Science Agency. The guide focuses on the process used by CSIRO to evaluate impact, so that the agency can provide robust evidence that the goal of producing positive impact is being accomplished. The process is set out in a series of steps, the first 4 of which map onto the process of identifying, delivering and assessing impact from the researcher point of view: establishing the purpose and the audience; identifying the impacts; clarifying impacts; and evaluating the impacts. The remaining 2 steps focus on comparability across programmes of work and sensitivity analysis. Step 2, identifying impacts, provides 3 broad impact types (economic, societal and environmental) along with categories for each (for example social impacts includes health & wellbeing, access to resources, safety, quality of life). These categories are further expanded in the appendices to the guide. 'Clarifying the impacts' helps frame how research can lead to impact by identifying what would have happened *without* CSIRO's work. 'Evaluating the impact' identifies different approaches that can be used, including cost-benefit analysis, social network analysis and qualitative methods. The guide also includes CSIRO's Impact Framework, which sets out their logic model for evaluation and covers: inputs, activities, outputs, outcomes and impact, with a worked example.

STRENGTHS

- Funder perspective on impact evaluation
- Step-by-step guide for both funder and researcher (to help the latter understand what the funder is looking for)
- Detailed information on impact types and categories
- Detailed information on different approaches to evaluation
- Logic model for evaluating impact

LIMITATIONS

- Guide not aimed specifically aimed at researchers, so some elements are less relevant than others.

APPLICATION

Best suited to: Researchers wanting to understand funder priorities/ perspective

Less suitable for: Researchers brand new to impact

Keywords: *STEM | Assessment | Evaluation | Funder perspective | Logic model*

Knowledge Translation and Transfer Plan

Ontario Ministry of Agriculture, Food and Rural Affairs

STEM

Planning ✓

Delivery

Assessment

SUMMARY

This guide is aimed to help researchers build a KTT – or knowledge translation and transfer – plan, to help 'accelerate the transformation of knowledge from research into use'. The plan is built around 5 core questions: what knowledge about your research will you transfer to users?; who would benefit from the knowledge produced by your research?; who should transfer this knowledge to users?; how will the knowledge be transferred?; and what is the expected impact of the research? A template is provided which covers research user groups/ target audiences; involvement of users in the project; methods of communication/ engagement; and how the users will benefit from the research. Each is illustrated with an example. The guide also contains best practices, a checklist and additional resources. There is also a detailed list of KTT tools, categorised under events, publications, meta tools, and sustainability.

STRENGTHS

- Easy-to-follow template with worked examples
- Built around 5 core questions, covering what, to whom, by whom, how and impact.
- Detailed list of knowledge transfer tools
- Contains best practice, a checklist and further resources

LIMITATIONS

- Introductory, rather than detailed, guide
- Focus on transfer is simplistic compared to broader drives to mobilise or co-produce impact

APPLICATION

Best suited to: Research where knowledge can be transferred, such as that with a clear target audience

Less suitable for: Researchers seeking detailed guidance on planning, delivery and/or assessment of impact, or research more requiring of coproduction

Keywords: *STEM | Planning | Templates*

What is research impact and why does it matter? Workbook

https://www.rsc.org/globalassets/05-journals-books-databases/our-journals/maximise-your-impact/impact-masterclass-workbook---what-is-research-impact-and-why-does-it-matter.pdf

Royal Society of Chemistry and Kudos

STEM

SUMMARY

A workbook co-produced by the Royal Society of Chemistry and Kudos covering what research impact is; why it's important; how impact is achieved; and how it is measured. Information on types of impact draws on Fast Track Impact's typology and provides a space for researchers to consider the different types of impact that might be relevant to their research. In 'why does research impact matter', researchers are encouraged to think about the question from their own perspective, that of a funder and that of their institution. 'How is research impact achieved?' looks at 6 stages, from access to the research through understanding, engaging, action and advocacy to impact. Measures of impact include citations, altmetrics, impact case studies and impact evidence, with space for researchers to note the measures they currently use and those they might use in the future. The guide includes a helpful summary and links to books and online resources.

STRENGTHS

- Easy-to-read introduction to research impact
- Space for researchers to apply the concepts to their own research
- Identifies 6 stages to achieving impact: access, understanding, engaging, action, advocacy, impact
- Includes examples of impact measures (although some, like citations, do not measure impact)
- Links to further resources

LIMITATIONS

- Although produced by the RSC, the information is not domain specific
- Introductory, rather than detailed, guide
- Mixes citations and altmetrics with impact.

APPLICATION

Best suited to: Researchers seeking general introduction to research impact

Less suitable for: Researchers seeking detailed guidance on planning, delivery and/or assessment of impact
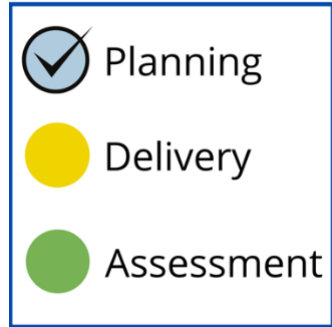
Keywords: STEM | Planning |

Research Impact

https://www.sfi.ie/funding/award-management/research-impact/

Science Foundation Ireland

STEM

✓ Planning

● Delivery

● Assessment

SUMMARY

This resource has been designed by Science Foundation Ireland to provide information and guidance on impact. This site provides an overview of impact, particularly as it relates to SFI strategy; types of impact (economic, societal, international engagement, policy and public service, health and wellbeing, environmental, professional services and human capacity); and guidance on preparing an impact statement (plan) and producing an impact report. Links for further sources of information are provided, along with case studies and access to an SFI impact webinar. This is a non-interaction, information provision resource produced by a funder to support applicants in developing and reporting impact of funded projects.

STRENGTHS

- Simple, clear information on impact, impact plans and impact reports
- Broader set of impact types than often listed in other sources

LIMITATIONS

- Information only
- Some aspects specific to SFI
- Generic

APPLICATION

Best suited to:
Researchers new to impact or seeking guidance on planning/ reporting impact for a funder

Less suitable for:
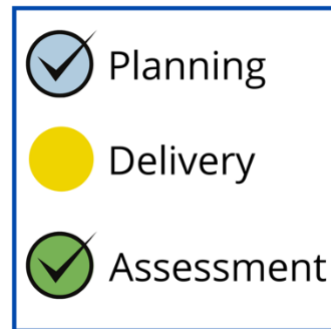Researchers with more substantive knowledge or requiring more structured support

Keywords: *STEM | Planning | Funder perspective*

Impact evaluation

https://www.betterevaluation.org/en/themes/impact_evaluation

Better Evaluation

Broader

SUMMARY

An impact evaluation framework developed by a global collaboration aimed at improving evaluation practice and theory through co-creation, curation, and sharing information. The guide works through each stage of impact evaluation: what, why, when, who to engage and how to plan, posing questions for the user to consider as they plan their own impact evaluation. Different methods for doing impact evaluation are explored, including OECD-DAC criteria for evaluating development assistance and a set of key evaluation questions, with a focus on establishing 'causal attribution' to ensure robust decision making. The guidance is based around the Better Evaluation Rainbow Framework, a categorised list of evaluation methods and processes to manage, define, frame, describe, understand causes, synthesise, report & support use. For example, 'define' includes developing a theory of change and 'describe' includes information on sampling, measures, data collection and management, combining quantitative and qualitative data, analysis and visualisation. The framework can be downloaded, along with guides on how it can be put to use. Within the impact evaluation section, there are links to a range of UNICEF resources on impact evaluation. There is a separate section on influencing policy, covering providing advice, advocacy, lobbying and activism, and links to further resources.

STRENGTHS

- Detailed tool for planning and evaluation
- Clear steps for each stage of the monitoring and evaluation process
- Each step is broken down into actionable tasks
- Links to OECD and UNICEF resources
- Available online and as downloadable resources
- Combination of short descriptions and option to go into more detail where needed.
- Broadly applicable to different disciplines
- Includes consideration of causality
- Separate information on influencing policy

LIMITATIONS

- While applicable to different disciplines, the focus is on international development and humanitarian projects and interventions

APPLICATION

Best suited to: Research focused on community or large-scale impact, with the opportunity to monitor implementation and impact

Less suitable for: More fundamental research, or research not focused on social effects.

Keywords: *Social impact | Planning | Assessment | Evaluation | Theory of Change | Data |*

Engaged Research Planning for Impact

http://www.campusengage.ie/wp-content/uploads/2018/12/Campus_Engage_Impact_Framework_May_2018_Web.pdf

CampusEngage

STEM

Planning

Delivery

Assessment

SUMMARY

This information resource has been designed by CampusEngage and focuses on engagement as a means for society and higher education to jointly address societal grand challenges. This resource expresses the benefits of engaged research for impact, followed by guidance on using logic models. The resource then draws on the impact categories developed by Science Foundation Ireland to produce an impact framework, including a cross-cutting theme on 'new knowledge production'. Each category of impact – economic, environmental, health and wellbeing, policy/product development, professional and public service, social and cultural, internationalisation, capacity building – is then presented with details of likely beneficiaries and a list of potential indicators of impact. Finally guidance is given on drafting impact statements in funding bids

STRENGTHS

- Emphasises value of engaged research
- Clear categories of impact
- Broader set of impact types than often listed in other sources
- Itemised lists of example indicators in each category

LIMITATIONS

- Information only
- Guidance on writing an impact plan is short ('top tips')

APPLICATION

Best suited to: Researchers seeking example indicators of impact categories

Less suitable for: Researchers requiring more structure to plan, deliver or assess impact
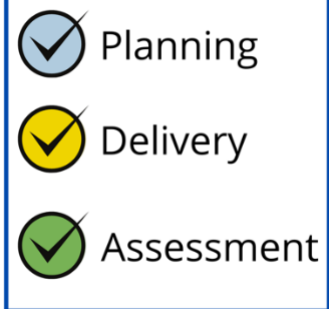
Keywords: *Engagement | Planning | Types | Indicator*

Impact Literacy workbook

Emerald

Broader

Planning ✓
Delivery ✓
Assessment ✓

SUMMARY

This tool focuses on the need for an 'impact literate' approach to impact, which is the ability to understand, appraise and make decisions about how to connect research to the outside world. The downloadable workbook guides users through the how, what, who and why of impact. First users are guided through framing the problem, both at an overall (strategic) and more specific (project-focused) level. Next they 'flip' this problem to frame the impact arising from the project, and the contribution of this to the overall issue. After this they move into identifying specific indicators and associated evidence; stakeholders and beneficiaries; activities to co-produce impact (by involving stakeholders in the research process); methods to mobilise knowledge (engaging/communicating with stakeholders); considering challenges and facilitators; and compiling this into a plan. Each element includes a description, questions/ guides/ examples for consideration, and space to capture the relevant information. For example, in the section on identifying indicators and evidence, users are encouraged to answer 4 questions and then record their answers in the workbook. Questions cover: what changes as a result of the research; how the researcher will know; how the researcher can demonstrate that change; and how they will log it. A diagram for the summary plan is also included. The concept of flipping the problem is a useful starting point for those new to impact, outlining a straightforward process to help frame the impact, by turning the problem (negative) into a positive (impact), with example 'flips' included.

STRENGTHS

- Easy-to-follow, step-by-step guide to impact through the different phases
- Framed within the concept of impact literacy: the ability to understand, appraise and make decisions about how to connect your research to the outside world
- Questions, tips and examples to support the user through the process
- Spaces to capture and log information
- Overall summary plan diagram included
- Flipping the problem provides useful way to identify impact goals
- Includes concept of co-production
- Includes self-evaluation of skills needed to mobilise knowledge
- Focus on considering impact at each stage of the research process

LIMITATIONS

- No domain specified, so information is deliberately broad
- Comprehensive, so requires time

APPLICATION

Best suited to: Researchers wanting to take a systematic (and common-sense) approach to impact planning; researchers new to impact

Less suitable for: Researchers not seeking to coproduce or pursue social impact

Keywords: *Planning | Delivery | Assessment | Evaluation | Impact Literacy | Templates | Evidence | Stakeholders*

Impact Planning toolkit

https://www.fasttrackimpact.com/post/2019/03/18/research-impact-planning

Fast Track Impact

Generic

SUMMARY

Video and written guide to impact planning created by a consultancy that provides evidence-based resources and training for researchers who want to generate impact from their research. The guide starts with identifying beneficiaries, linking to further information and template for stakeholder and public analysis and an advanced guide to stakeholder analysis. Definitions for impact are provided in an impact typology, to help users identify the benefits from their research. The typology covers 10 areas: attitudinal, economic, environmental, health & wellbeing, policy, other decision making, cultural, other social, and capacity/ preparedness. After identifying beneficiaries and potential benefits, the guide moves to identifying activities to deliver this. Step 3 focuses on identifying indicators to determine if the activities are working and if the research is achieving impact. Next, users are encouraged to consider barriers to impact or unintended consequences, and how they might manage or mitigate those risks. The final step is to prioritise the activities that are most likely, or most realistic to achieve impact. A downloadable impact planning template is included, with fields for impact goals, target stakeholders, activities, indicators of successful engagement, indicators of progress towards impact, risks and mitigations, resources and timing, along with a worked example.

STRENGTHS

- Step-by-step guide to impact planning, with a particular focus on identifying impact types and stakeholders/ potential beneficiaries
- Includes impact typology covering 10 impact types
- Linked information on stakeholder analysis
- Range of templates provided
- Information provided as webpage, downloads and videos

LIMITATIONS

- No domain specified, so information is deliberately broad
- Focus is on the identification of impacts, rather than subsequent stages

APPLICATION

Best suited to: Researchers needing support to identify potential impacts and beneficiaries

Less suitable for: Researchers needing support across the whole of the impact process

Keywords: *Planning | Stakeholders | Templates*

Good practice guidance: evaluation

https://www.heritagefund.org.uk/good-practice-guidance/evaluation-guidance

Heritage Fund

Broader

Planning ✓

Delivery ●

Assessment ✓

SUMMARY

A resource focused on the evaluation of projects, specifically those funded by the National Lottery. The guide directs users through the evaluation process at each stage of the project, emphasising the importance of planning evaluation from the start. It includes a detailed guide on using a logic model to support planning, explaining how the model works and the differences between inputs, outputs and outcomes (impacts). The guide outlines 6 principles for good evaluation, including (a) using a logical approach to planning, (b) using appropriate and methodical ways of gathering robust data, (c) analysing data to provide evidence on outcomes, (d) making the evaluation objective, (e) clearly presenting the results, and (f) providing conclusions based on that evidence. The resource includes guidance on how to gather data, including considering what is already available, who will be responsible for data collection and which research methods will be used, along with the importance of establishing baseline data, against which change can be measured. Information is provided about how to gather different types of data and how to interpret it. Finally, the guide encourages users to compare their results against a framework of outcomes. Whilst the outcomes included are heritage-based, the principles are valid and the approach can be applied to any relevant set of outcomes or objectives.

STRENGTHS

- Arising from the heritage sector, but applicable to other domains
- Focuses on evaluation but includes principles for good planning
- Includes guidance on different types of impacts
- Focus on evaluation, built around 6 core principles
- Detailed information on how to gather and analyse data, in order to provide evidence of impact
- Encourages use of logic models
- Focus on evidence encourages objective evaluation
- Links to helpful tools

LIMITATIONS

- Focuses on linear pathways

APPLICATION

Best suited to: Research with a clear pathway from research, through outputs and towards impact

Less suitable for: Projects which already have an established approach to evaluation; non linear pathways

Keywords: *Objective | Measurement | Analysis | Evidence | Logic Model | Data*

Inspiring impact

https://www.inspiringimpact.org/

Inspiring impact

Broader

Planning ✓
Delivery ✓
Assessment ✓

SUMMARY

Aimed at UK charities and social enterprises, Inspiring Impact provides a step-by-step guide to 'make good impact practice the norm'. Sections include understanding what impact practice is; how to plan, do, assess and review impact practice; data collection; and peer learning. Each section consists of further information such as guidance in 'Plan' on defining the audience, articulating a plan and reviewing existing data, along with downloadable worksheets and reflective questions to guide development. The 'Do' section contains guidance on data collection, surveys, interviews and focus groups, as well as less formal data collection methods, such as online discussion forums, social media and short polls. 'Assess' provides guidance on data analysis (quantitative and qualitative) and how to understand that data in the wider context. This section also includes an interactive 'data diagnostic' tool to help consider the kinds of data that a user should consider collecting. 'Review' offers advice on interpreting and sharing findings. The site also includes an 'impact practice self-assessment' tool to help people get started, and covers research ethics and data protection.

STRENGTHS

- Detailed guide through four stages of impact practice: plan, do, assess and review
- Interactive tools for self-evaluation and data diagnosis
- Clearly laid out, with concise definitions, a jargon buster, and easy to follow guidance
- Downloadable worksheets to help the user build up their own impact plan
- Useful information on data collection, analysis and presentation

LIMITATIONS

- Focuses on interventions/ activities for social impact

APPLICATION

Best suited to: Researchers new to impact; or those seeking specific social impacts.

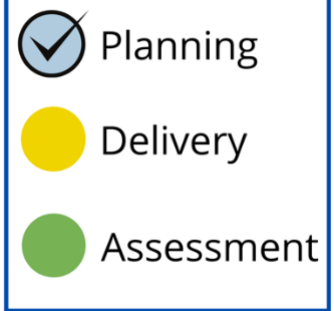**Less suitable for:** Research focused on other types of impact, such as economic or environmental

Keywords: *Social impact | Planning | Delivery | Assessment | Evaluation | Data | Interactive*

What is research mobilization?

Kudos

Broader

Planning ✓

Delivery

Assessment

SUMMARY

A downloadable non-interactive guide created by Kudos, an online research dissemination platform. The guide is built around the Kudos model for accelerating research impact, which works through 5 stages: reach, engage, change, amplify, impact. A short description is given of each stage, including an explanation of why each is important, how each can be achieved, and giving examples of activities that might be involved (such as events and social media).

STRENGTHS

- Basic introduction to start impact planning
- Includes information about different parts of the impact process and how each might be achieved

LIMITATIONS

- No domain specified, so information is deliberately broad
- Information is introductory, rather than detailed
- No interaction; printed information only

APPLICATION

Best suited to: Researchers brand new to impact

Less suitable for: Researchers who are knowledgeable about impact or who require more structured support.
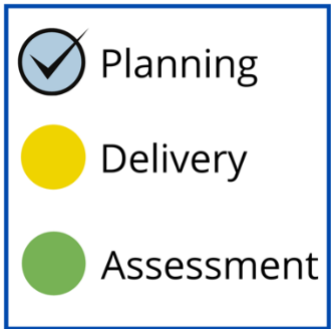
Keywords: *Planning |*

Impact Canvas

https://staff.mq.edu.au/research/commercialisation/right-spotlight/Impact-Canvas.pdf

MacQuarie University Commercialisation and Innovation

Broader

Planning ✓

Delivery

Assessment

SUMMARY

MacQuarie's Impact Canvas presents both a worked example and a blank template for users to consider different elements of impact as part of their impact planning process. The template includes sections on: inputs; support; to do list; further resources; research summary; why (what's new/ different); distribution channels; who benefits?; relationships; impact measurements; revenue streams & non-financial outcomes; research outputs; academic outputs; impact outputs; and sensitivities. The worked example contains a set of questions in each field to prompt the researcher to consider different aspects before completing their own version.

STRENGTHS

- Straightforward, concise template to enable researchers to create a basic impact plan on one page
- Contains questions to prompt further consideration in different areas
- Identifies beneficiaries of research

LIMITATIONS

- No domain specified, so information is deliberately broad
- Does not contain any explanatory information
- Limited view of impact 'outputs' and no space on the template to capture actual impact

APPLICATION

Best suited to: Researchers familiar with impact; those seeking tangible impacts

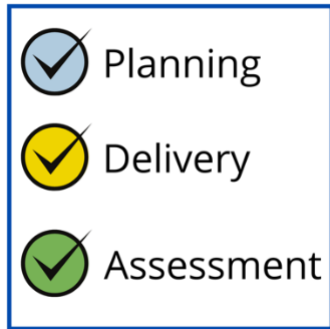**Less suitable for:** Researchers new to impact; those working in areas where impact is less likely to be tangible

Keywords: *Planning | Template*

Impact Guide

https://knowhow.ncvo.org.uk/organisation/impact

National Council for Voluntary Organisations

Broader

Planning ✓
Delivery ✓
Assessment ✓

SUMMARY

The National Council for Voluntary Organisations (NCVO) supports voluntary organisations, and has free to access resources on impact planning, measurement, reporting and using evaluation findings. This 'Know How' section focuses on evaluating the social impact of volunteer activities and whilst the site focuses on volunteering, the guide is generically applicable. It covers why impact is important, how to plan impact – including needs assessment and a theory of change – and how to evaluate it most effectively by deciding what to measure at the planning stage. Detail is provided on methods to collect impact data, such as interviews and questionnaires, and the guide also covers how to share the outcomes with external audiences. The resource also contains a link to a report on good practice for monitoring and evaluation impact for funders (Does your money make a difference?), summarising the questions funders might ask to evaluate value for money.

STRENGTHS

- Covers impact from the start of the process, through planning, delivery and assessment
- Includes guidance on how to identify different types of impact and different types of measurement for evaluation purposes
- Useful set of tools and guides on each stage to supplement the descriptions
- Contains detailed guide on how to engage with audiences at different stages of the project, which could be used to help deliver impact
- Information is presented in short sections, meaning it is easy to navigate, with links to additional resources
- Presents information for funders as well as grant recipients

LIMITATIONS

- Not aimed at researchers
- Impact is focused on activities carried out by voluntary organisations, rather than research projects
- Focus is on social impact

APPLICATION

Best suited to:
Research that seeks social impacts, involving different stakeholders

Less suitable for:
Research that is focused on other types of impact, such as economic or environmental

Keywords: *Social impact | Planning | Delivery | Assessment | Evaluation | Funder perspective | Tools | Data*

DIY Toolkit

https://diytoolkit.org/

Nesta

Broader

SUMMARY

A toolkit designed by UK innovation charity, Nesta, for 'development practitioners to invent, adopt or adapt ideas that can deliver better results'. This isn't a toolkit aimed directly at research projects, but the approaches are adaptable for the research community. The toolkit contains a selection of guidance and support tools that can be used to clarify ideas, collect inputs from stakeholders, generate new ideas, and test, improve, and implement solutions. For 'developing a clear plan', for example, tools include SWOT analysis and 'learning loop'. For clarifying priorities, tools include guidance on problem definition, alongside a 'causes' diagram and theory of change. 'Collecting inputs from others' includes tools for interviews, question ladders and storytelling, with additional resources on creative workshops, engaging with stakeholders, and values mapping. The toolkit also includes information on prototype testing, business plans, and scaling plans, for those looking to increase the scale of their work. Each tool has an associated downloadable template along with guidance on how to use the tool and tags to highlight where in the process that tool might be used.

STRENGTHS

- Toolkit that provides information and templates for a range of tools that could be adapted for planning and delivering different parts of research projects.
- Easy to use, interactive and downloadable as individual parts or the whole toolset
- Broadly applicable
- Specific guidance on prototyping, business plans and scaling plans

LIMITATIONS

- Not specifically designed for research impact (although does contain elements that are useful to research impact)
- Focused on social innovation

APPLICATION

Best suited to: Researchers looking for tools to help with specific elements of their impact planning

Less suitable for: Those new to impact; those working outside of social innovation

Keywords: *Social impact | Planning | Delivery | Innovation| Templates | Theory of change | Prototyping | Scaling*

Knowledge mobilization

https://www.ryerson.ca/research/resources/km/

Ryerson University

Broader

| Planning |
| Delivery ✓ |
| Assessment |

SUMMARY

Ryerson's Knowledge Mobilization website provides links to tools and downloadable templates to help plan knowledge mobilization. These include: an introduction to strategies and tools; tools which fall into the 'delivery' phase of impact (forums, policy report, media, etc); a planning matrix to map stakeholder/ audience types against different strategies and tools; and a guide and worksheet to create a plain-language summary of the research. Links to knowledge mobilisation theory are also included.

STRENGTHS

- Includes templates for different aspects of the impact 'delivery' phase
- Includes a plain-language writing guide

LIMITATIONS

- No domain specified, so information is deliberately broad
- Multiple rather than single resource, each focused on a specific aspect of impact.

APPLICATION

Best suited to: Researchers planning activities for delivering impact

Less suitable for: Researchers who have already identified ways to deliver impact or need a more structured approach to impact.
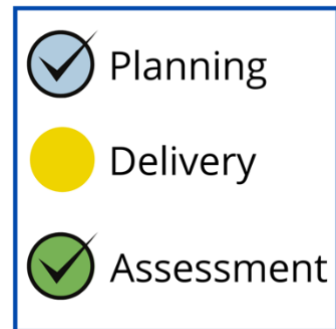
Keywords: *Delivery | Templates*

Social Impact Toolbox Frameworks

https://www.socialimpacttoolbox.com/the-frameworks/

Social Impact Toolbox

Broader

SUMMARY

This tool has been developed by University of Technology Sydney (UTS) Business School to support non-profit organisations plan and evaluate their social impact. The website provides an explanation of social impact with a focus on evaluation. The site provides 3 standardised frameworks with associated explanations and templates/worksheets: (a) theory of change, (b) logic model and (c) evaluation framework. In addition, the Tool Library provides a 'find a tool' function, allowing site visitors to search through a curated list of tools across health & wellbeing; leadership; community development; family & relationships; education and learning; and disabilities. For example, 'health & wellbeing' links to a set of validated tools including WHO Well-Being Index, the Warwick-Edinburgh Mental Wellbeing Scale, and UCLA Loneliness Scale, among many others. The site also includes the 'DIY Builder', an online tool for users to configure impact plans for their own projects as they work through the elements of the frameworks. There is also a section on ethics in evaluation.

STRENGTHS

- Interactive frameworks, with links to downloadable resources as well as an online 'DIY Builder'
- Explains different tools/ approaches for evaluation
- Range of domains covered, including health & wellbeing
- Includes wide range of validated tools for evaluation in each domain
- Covers ethics in evaluation

LIMITATIONS

- Focus is on social impact

APPLICATION

Best suited to: Research that seeks social impacts, involving different stakeholders

Less suitable for: Research that is focused on other types of impact, such as economic or environmental
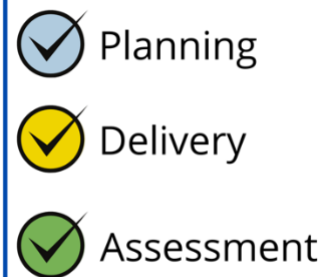
Keywords: *Social impact | Planning | Assessment | Evaluation | Tools | Logic Model | Theory of Change*

Impact wizard

https://impactwizard.eu/en/dashboard

Social innovation factory

Broader

Planning ✓
Delivery ✓
Assessment ✓

SUMMARY

An online, interactive tool developed by this networking organisation to support social and societal innovations. After setting up a free account, the user can then work through modules including theory of change, measurement plan, measure and analyse, and maximising impact. Users input answers to a set of questions, generating results from the wizard. For example, for the theory of change module, users answer questions to define the problem, identify stakeholders, identify interventions and specific actions, and define short, medium and long-term outcomes. Outcomes are organised in three domains (social cohesion, ecology, and education), which are connected with a range of external sources such as the United Nations Sustainable Development Goals (SDGs). These can be adapted or customised by users, with input informing the development of a measurement plan. The tool includes a section on measurement methods, each linked to further information on aspects such as surveys, validated scales, observation and media analysis. There is also functionality to build a survey tool to collect the necessary data, and guidance to support communicating and monitoring impact.

STRENGTHS

- Interactive tool that builds an impact plan
- Set out in clear stages, with questions to prompt thinking
- Each section builds on the last, using answers to previous questions to shape what comes next, meaning the user can't skip particular aspects.

LIMITATIONS

- Domains and tools limited
- The one-size-fits all approach might not suit all projects

APPLICATION

Best suited to: Researchers working on social cohesion, ecology or education projects and want a guided approach to impact planning

Less suitable for: Those who want a more flexible approach; researchers outside of domains.
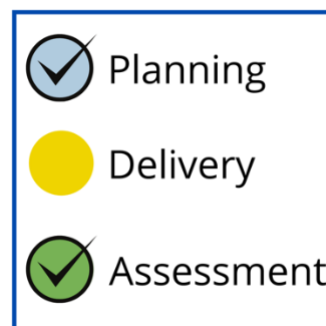
Keywords: *Social impact | Planning | Delivery | Assessment | Evaluation | Interactive | Theory of change*

A guide to social return on investment

http://www.socialvalueuk.org/app/uploads/2016/03/The%20Guide%20to%20Social%20Return%20on%20Investment%202015.pdf

Social Value UK

Broader

SUMMARY

Produced by the Social Return on Investment (SROI) Network as an update to the guide published by the Cabinet Office in 2009, this Guide focuses on calculating social return on investment as part of a longer process establishing scope, identifying stakeholders, mapping outcomes (using an impact map), evidencing outcomes, establishing impact, calculating SROI, reporting, using and embedding the results. Each of the steps includes questions to help guide planning, top tips and worked examples. Resources include a checklist and blank impact map, alongside guidance on methods and determining appropriate subjective and objective indicators. Users are also invited to consider factors like *deadweight* (what would have happened without the activity/ intervention) and *displacement* (where positive outcomes in one area create unintended consequences in others). The emphasis throughout is on allocating a value to each of the outcomes, relevant to research projects and/or funders. The guide ends with a section on sharing the findings with stakeholders, with some useful examples of what could be included. The website also contains a guide aimed specifically at social entrepreneurs, including information about defining and measuring impact (social value) of interventions.

STRENGTHS

- Detailed guide on calculating SROI
- Looks at impact from a cost-benefit perspective
- Broad range of impacts considered
- Users encouraged to specify impacts (outcomes) from the start
- Interactive elements, with top tips, worked examples and places for users to build their own plan
- Template impact map that could be adapted for different research projects
- Includes information on indicators and proxies, useful for evaluation

LIMITATIONS

- Guide is shaped by the focus on SROI
- Focuses on social impact

APPLICATION

Best suited to: Research seeking social impacts and/or needing to calculate SROI/ cost-benefit

Less suitable for: Research not delivering social impacts through activities/ interventions
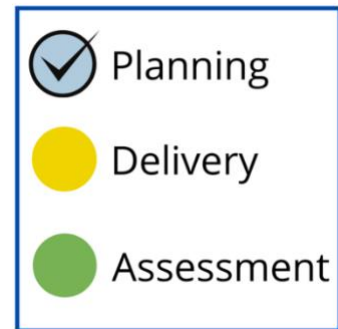
Keywords: *Social impact | Planning | Assessment | Evaluation | Data | Cost-benefit | Social value | SROI | Indicators | Templates*

Research impact at the UK Parliament

https://www.parliament.uk/get-involved/research-impact-at-
-uk-parliament/

UK Parliament

Broader

Planning

Delivery

Assessment

SUMMARY

This resource offers a guided explanation about how research is used by UK Parliament. It covers the reasons to work with parliament, what Parliament is interested in, and different ways to engage with the Parliamentary process. There is a section of short 'How to' guides covering research that is useful for Parliament; getting research into Parliament; understanding who uses research in parliament; issues around legislatures; submitting evidence to a select committee and writing policy briefs. The process of getting research into parliaments is set out in a useful infographic which includes 'top 10 tips' to making connections, covering being seen online or at events; following Parliament members on twitter; inviting Parliamentary staff to events; and using visuals in reports. The range of guides and further information also explains 'routes in' to different parts of the organisation and how to brief Parliament about research, alongside giving examples of parliamentary impact and how it might be evidenced.

STRENGTHS

- Information about how to access the different parts of Parliament, helping researchers navigate routes into policy impact.
- Includes information about the devolved administrations as well as the UK Parliament
- Guides are short, clear and concise, including visuals
- Includes a range of examples of how research is used by Parliament, and what the impact might look like
- Includes examples of how Parliamentary impact might be evidenced
- There is a link to finding different contacts within Parliament

LIMITATIONS

- Focuses on policy only

APPLICATION

Best suited to: Researchers who are pursuing policy impact.

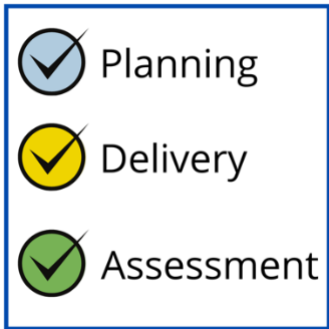**Less suitable for:** Researchers not focusing on policy-related outcomes.

Keywords: *Policy | Engagement*

Planning for impact toolkit

University of Bath

Broader

Planning ✓
Delivery ✓
Assessment ✓

SUMMARY

Designed by the University of Bath to help researchers plan for impact and prepare information for grant applications. While it is aimed at a specific outcome (the now defunct Pathways to Impact), it does provide a useful guide to the different stages of the impact process. The toolkit starts by exploring why planning for impact is important and then sets out 5 steps, covering beneficiaries, impact, stakeholder engagement, resources and evidence. Each section includes elements to help the researcher consider the topic in more detail, including diagrams, questions and tips, as well as links to other resources. The information in the evidence section relates to four 'impact types' – policy; practice; commercial; public discourse – each with examples of evidence that might be relevant. The appendices include useful details about activities that might be carried out to reach beneficiaries, such as printed materials, events, films and websites. Each contains advantages and considerations, examples, costs, advice and resources.

STRENGTHS

- Step-by-step guide to all stages of the impact process
- Includes clear definitions
- Each step is supported by links, questions, diagrams and tips
- Planning for impact template included
- Useful information on a wide range of activities to reach beneficiaries, detailed with advantages, considerations, examples, costs, advice, and resources.

LIMITATIONS

- No domain specified, so information is deliberately broad
- Aimed at the Pathways to Impact section of UK grant applications, so not all the information is relevant

APPLICATION

Best suited to: Researchers starting out with their impact planning; research with defined beneficiaries

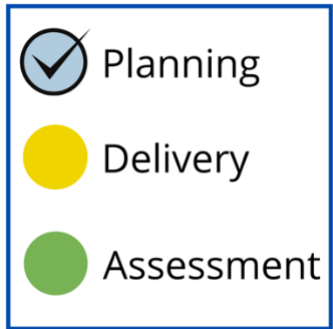**Less suitable for:** Research with less well-defined beneficiaries

Keywords: *Planning | Delivery | Assessment | Evaluation | Stakeholders | Templates*

Pathways to impact

https://www.research-strategy.admin.cam.ac.uk/pathwaytoimpact/index.html

University of Cambridge

Broader

Planning
Delivery
Assessment

SUMMARY

A tool developed to help researchers plan their approach to creating impact from their research, via a series of steps. Steps include: thinking about what drives the user; starting early; seeking support; building partnerships; building SMART objectives; creating a realistic budget; evaluating and evidencing impact; and reacting to opportunities. Templates, prompt questions and links to examples are included throughout the sections. For example, in 'starting early', there is an impact planning template that sets out the research aim, potential impact, stakeholders, benefits to stakeholders, impact activities, resource, milestones, experience and evidence. 'Evaluating and evidencing impact' links to online resources which include the 2016 Digital Science report on the societal and economic impacts of academic research (containing information on types of evidence selected frequently by researchers in UK universities, p4).

STRENGTHS

- Aimed at those starting out with research impact
- Includes impact planning template
- Links to further information throughout

LIMITATIONS

- No domain specified, so information is deliberately broad
- Information is introductory, rather than detailed

APPLICATION

Best suited to:
Researchers brand new to impact

Less suitable for:
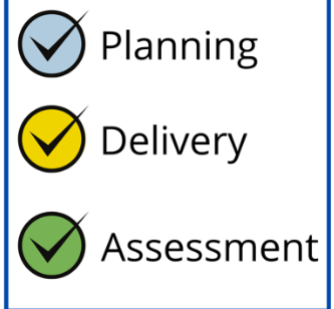Researchers who are knowledgeable about impact or who require more detailed support

Keywords: *Planning | Templates*

Impact Planning Toolkit

https://www.sheffield.ac.uk/rs/impact/planning_toolkit

University of Sheffield

Broader

Planning

Delivery

Assessment

SUMMARY

A toolkit developed by the University of Sheffield to help researchers identify the potential impact of their research. The toolkit is based around 5 questions: 1) what impact could come from my research?; 2) who else is interested in this?; 3) how can I engage stakeholders with my research?; 4) what can I measure?; and 5) what support do I need?. Question 1 lists different types of research impact, before posing questions designed to encourage users to consider the potential changes that could result from their research. Question 2 focuses on public engagement, with links to the National Coordinating Centre for Public Engagement and their map of potential research stakeholders. Question 3 contains examples of different types of activity that might be used for engagement, including commercialisation, events, film and audio, policy briefs, practitioner training, and social media. Further questions are included to help users consider their options. Question 4 looks at what can be measured and what is already measured by others. Question 5 focuses on internal support.

STRENGTHS

- Information provided on all impact phases
- Introduces researchers to a broad range of different impact types
- Range of engagement activities included
- Useful starting point for researchers new to the concept of impact

LIMITATIONS

- No domain specified, so information is deliberately broad
- No interactive elements or templates

APPLICATION

Best suited to:
Researchers brand new to the concept of impact

Less suitable for:
Researchers looking for practical tools and tips

Keywords: *Planning | Delivery |Assessment | Evaluation | Engagement*