ISDM

INDIAN SCHOOL OF
DEVELOPMENT MANAGEMENT

DM-SIMM

A Funder's Guide to Reflect, Learn, and Act on Social Impact

Page intentionally left blank

Copyright

Credits

Author
Kankana Trivedi
Krutika Katre
Sharon Weir
Sulagna Choudhuri

Core Working Group – Co-creation and Content Development
Archana Pillai
Divya Chopra
Jigisha Maheta
Liby T. Johnson
Maharshi Vaishnav
Narendranath Damodaran
Sameer Shisodia
Suneeta Krishnan
Vijay Pingale

Technical Partner – Framework Development
Sharon Weir & Sulagna Choudhuri, 4th Wheel Social Impact

Reviewers
Trisha Varma, Core Working Group Members

Visual Design and Illustrations
Sri Harsha Dantuluri

Editing, Proofreading and Dissemination Support
Tias Dutta

Contents

01. **Overview** 01

02. **The Funder's Role** 05

03. **Tailored Approach for the Ecosystem** 06

04. **How To Read And Use the DM-SIMM Approach** 07
- **Layer 1: Foundational Principles** 09
- **Layer 2: The Five-stage SIMM Lifecycle** 14
- **Layer 3: Funder Actions Across the SIMM Lifecycle** 17
- **Layer 4: Adoption Rubric across the Five SIMM Stages** 19

05. **End Notes** 21

06. **Annexures**
- **A - How was this approach developed?** 23
- **B - How is the approach relevant for varied funder typologies?** 25
- **C - Case Studies** 26
- **D - Detailed Checklists** 32
- **E - Adoption Rubric** 39
- **How Funders Should Use the Adoption Rubric** 44

Overview

Social Impact Measurement and Management (SIMM) has become central to development practice. Yet, in many social sector organisations, measurement continues to function primarily as a reporting requirement rather than a management tool that strengthens the creation of social impact. Indicators are often selected to demonstrate results to funders, evaluations occur after programs conclude, and data collected from communities rarely informs real-time decisions about how programs should evolve.

The social sector is increasingly moving toward approaches that emphasise systems thinking, collaboration, and adaptability. Concepts such as systems change, trust-based philanthropy, participatory development, and adaptive programming are becoming more prominent in both discourse and practice.

These shifts are changing expectations from measurement systems. There is growing recognition that traditional approaches-focused on predefined indicators, endline evaluation, and reporting-are often insufficient for understanding how change unfolds in complex and dynamic environments. As a result, there is increasing demand for approaches that:

- Capture change as it emerges
- Incorporate multiple perspectives, including those of communities
- Support learning during implementation
- Inform ongoing strategic and operational decisions

Development Management (DM) views development not as a linear process of delivering predefined interventions, but as a complex, adaptive process that requires continuous learning, negotiation, and adjustment in response to changing realities.

From this perspective, impact measurement is not simply a method for proving results after programs end; it is a governance and management practice that supports better decisions during implementation.

This approach responds to that reality by proposing an approach to Social Impact Measurement and Management that is anchored in Development Management (DM), providing a structured way to strengthen SIMM in contexts where change is non-linear and evolving.

Anchoring SIMM in DM (DM-SIMM) therefore requires shifting measurement closer to the processes through which impact is actually created: implementation, organisational learning, and community engagement. It requires moving from measurement as retrospective validation to measurement as a live system of insight and decision-making.

Traditional SIMM	SIMM Anchored in DM
Measurement for reporting	Measurement for decision-making
Fixed pathways	Adaptive pathways
Upward accountability	Shared accountability
Adaptation seen as risk	Adaptation seen as responsible management
Communities consulted (but late)	Communities shape meaning
MEL separate from implementation	Measurement embedded in implementation

How can different actors use this approach?

Funders: Funders, together with Social Purpose Organisation (SPO) Leadership and Program Teams, are the primary users of this approach. They can use it to review how their funding structures, reporting requirements, decision-making processes, and support systems either enable or constrain meaningful impact practice. The approach helps funders examine not just what they ask of grantees, but how their own expectations shape the conditions under which SIMM takes place.

Intermediaries, Technical Partners, and Ecosystem Actors: Intermediaries and technical partners can use the approach as a facilitation and alignment tool. It can support conversations between funders and implementing organisations, help translate the approach into operational processes, and build a shared understanding of what stronger SIMM practice looks like across multiple stakeholders.

Social Purpose Organisation (SPO) Leadership and Program Teams: SPO leaders and program teams are primary users of this approach, together with funders. They can use the approach to reflect on how impact is currently defined, tracked, interpreted, and used within their organisation. It can help surface where current measurement practice is strong, where it is weak, and where constraints may be coming from internal systems or external funder expectations.

Communities and Government/System Actors: These actors are not expected to use the approach in a formal or direct way. Their role is to inform it. Their experiences, constraints, priorities, and interpretations should shape how impact is framed, measured, understood, and acted upon. In that sense, they are central to the approach's relevance, even if they are not its primary users.

MEL and Frontline Teams: MEL and frontline teams can use the approach to strengthen how evidence is generated, interpreted, and used during implementation. It provides a way to connect field realities, implementation learning, and program decisions, while also helping teams identify where data systems or reporting expectations may be disconnected from actual use.

02

The Funder's Role

Over the past decade, it has become increasingly clear that the limitations of SIMM are rooted in incentives, governance structures, and power asymmetries across the development ecosystem. This is not primarily a technical problem. Measurement systems are often designed to satisfy accountability requirements rather than enable learning; implementing organisations operate within constrained funding structures that discourage adaptation; and communities remain peripheral to defining and interpreting what meaningful change looks like.

At the centre of this system are funders, who play a decisive role in shaping how impact is defined, measured, and acted upon. Through their influence on reporting expectations, funding structures, and accountability mechanisms, funders determine whether measurement functions as a compliance exercise or as a tool for learning, adaptation, and decision-making.

Funders shape what counts as evidence, how risk is interpreted, whether adaptation is rewarded or penalised, and whether communities and implementing organisations can meaningfully influence decisions. Therefore, strengthening SIMM is a funder challenge first, and a social sector organisation's capability challenge second. **As a result, strengthening SIMM is not only an organisational or methodological challenge, but it is fundamentally a funder-led systems challenge.**

Because power is unevenly distributed across the ecosystem, co-ownership cannot be assumed; it must be designed. Funders and system actors therefore carry greater responsibility to:

- Create safe spaces for challenge and feedback
- Enable meaningful participation from SPOs and communities
- Ensure decisions are not controlled solely by those who fund

Most SIMM systems underperform not because organisations lack indicators, tools, or commitment, but because funders often define the incentive environment within which measurement happens.

Funders are a key leverage point in fixing SIMM. Unless they redesign incentives, resourcing, reporting, and learning conditions, better impact practice will remain performative.

To know more about how this approach was developed, refer to Annexure A.

03

Tailored Approach for the Ecosystem

This approach is intended for actors across the development ecosystem and requires role-specific guidance.

Funders and Philanthropists: redesigning incentives, resourcing, reporting, and learning conditions

Social Purpose Organisations (SPOs): translating funding into programs and strategies

MEL and frontline teams: generating, interpreting, and using evidence during implementation

Communities: defining what meaningful change looks like and validating impact

Intermediaries and technical partners: supporting design, capacity building, and systems

Government and system actors: shaping policy alignment and institutional uptake

The approach does not assume that all actors hold the same level of influence. Rather, it recognises that different stakeholders engage with Social Impact Measurement and Management from different positions within the ecosystem. For this reason, while the approach may be useful across actors, its primary purpose is to support changes in funding practice that can enable stronger impact practice downstream.

Why should Funders do This?

- They currently shape the reporting and accountability logic organisations respond to
- They can either reinforce or reduce power asymmetries
- They are uniquely positioned to fund the invisible infrastructure of learning and adaptation
- Better SIMM improves portfolio effectiveness, sustainability, and systems influence
- The sector is moving toward systems change, trust-based philanthropy, and adaptive programming

Funders who do not evolve their SIMM practices risk funding activity, not impact.

To understand how this approach applies across different funder typologies, refer to Annexure B.

03

How to Read and Use the DM-SIMM Approach

This approach is designed to work across four connected layers. The principles define the shifts required in how funders understand and approach SIMM. The lifecycle explains how strong SIMM unfolds across a program. The stakeholder matrix translates these shifts into concrete actions funders need to enable with different actors at each stage. The adoption rubric then helps funders assess how much of this is actually in place across their portfolio. Detailed implementation guidance, stage-wise checklists, and rubric instructions are provided in the annexures so that the main approach remains strategic while linked tools support application in practice.

4 Layers of DM-SIMM

Layer 1: Foundational Principles

Three non-negotiable principles that anchor effective SIMM practice. Sets the values—the 'soul' of the approach, defining the principles that guide how SIMM should function.

Layer 2: The SIMM Lifecycle

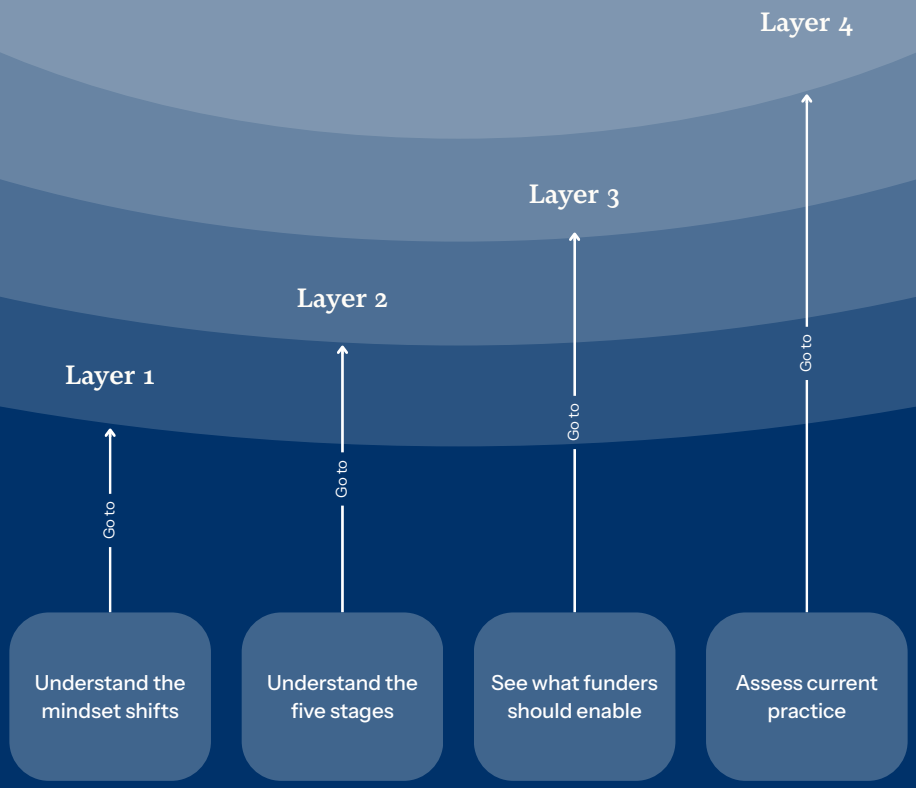
Five stages through which impact measurement and management unfold—from framing impact to using evidence for decisions. Provides the process—the 'skeleton', outlining the stages through which measurement and learning unfold across the program lifecycle.

Layer 3: Stakeholder Responsibilities

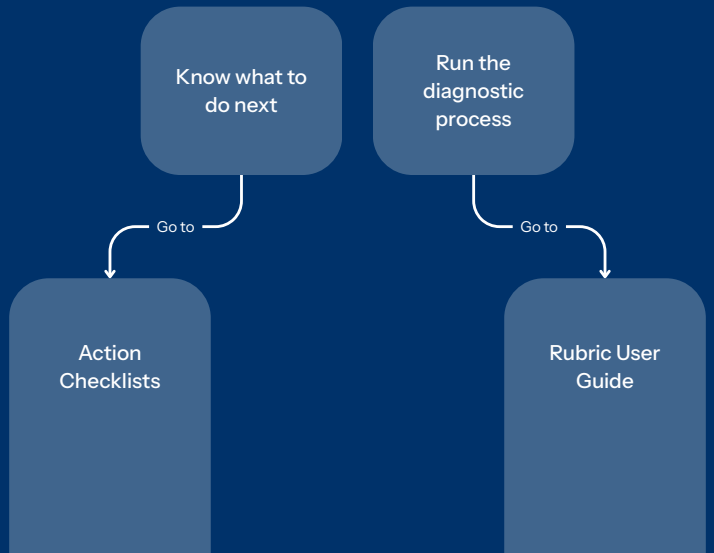
A matrix that translates principles into action by showing how funders work with organisations, communities, and systems to make measurement function in reality. Assigns accountability—the 'muscles', clarifying what funders must enable across different stakeholders at each stage for the system to function.

Layer 4: Adoption Matrix

A rubric that funders can use to assess how well their current practices align with the approach and identify areas for improvement. Enables honest reflection—the 'mirror', allowing organisations to assess how mature their current SIMM practices are and where they need strengthening.

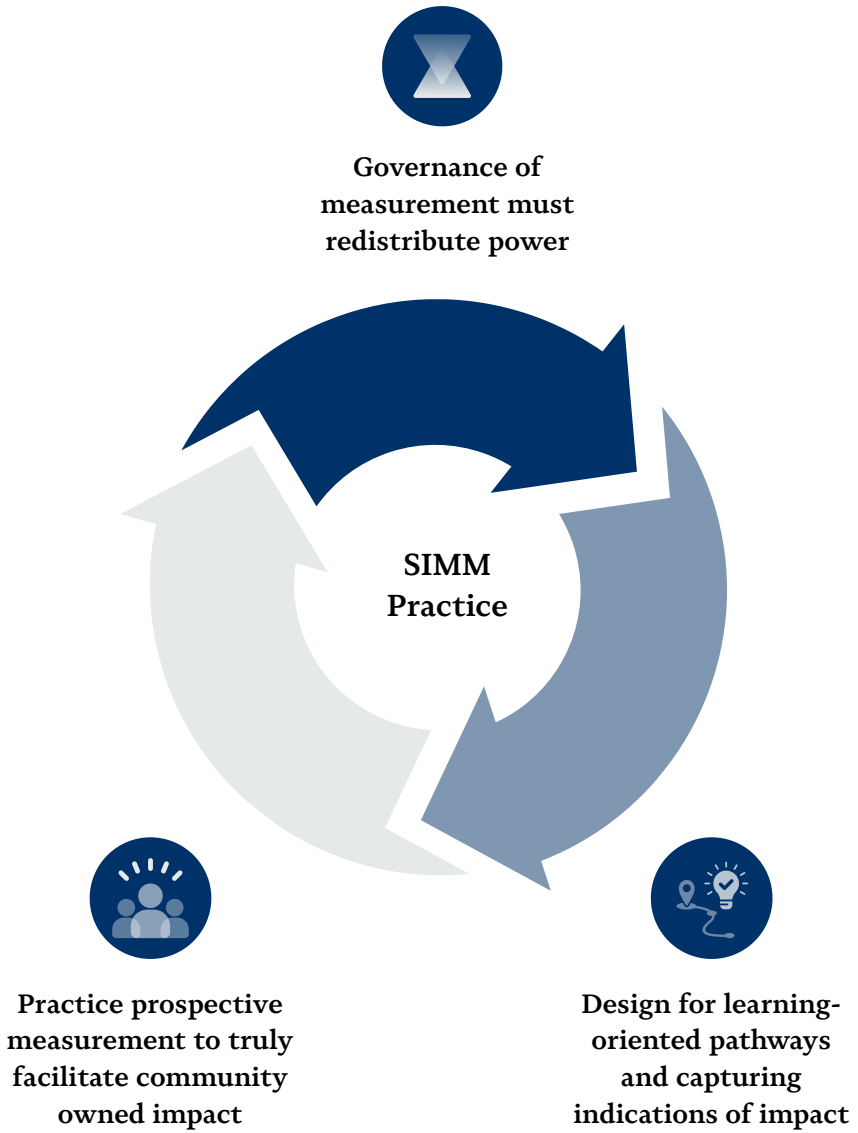


Where to Start?



Layer 1: Foundational Principles

Three non-negotiable principles that anchor effective SIMM practice. Sets the values—the "soul" of the approach, defining the principles that guide how SIMM should function.



1 Principle 1: Governance of measurement must redistribute power

Who sets purpose, priorities, and legitimacy?

Impact measurement is shaped by who decides what success looks like, what gets measured, and what happens when things don't go as planned.

Today, in most programs, these decisions sit largely with funders. Even when participation is encouraged, outcomes, indicators, and reporting formats are often defined upfront and remain fixed through implementation. Measurement systems then follow this structure: tracking delivery against predefined plans rather than helping understand whether those plans are actually working.

This principle is about shifting that. By changing how funders work with organisations and communities to define, interpret, and act on impact.

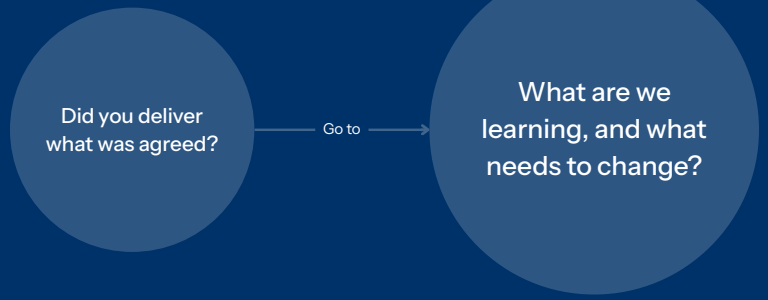
This shift requires moving from measurement as a reporting requirement to measurement as a shared management process.

What this means for Funders in practice?

The following actions are not additional layers of work. They are ways of restructuring existing processes so that measurement supports learning and decision-making.

- Use standardised templates-but design them for thinking, not just reporting
- Build regular review spaces into program cycles
- Invest in partner capacity for measurement
- Integrate community perspectives into measurement

The shift is from:



Why this matters?

Without this shift	With this shift
1) Measurement remains a compliance exercise	1) Programs become more grounded in reality
2) Programs continue even when they are not working	2) Resources are used more effectively
3) Organisations optimise for reporting, not impact	3) Impact is shaped through learning, not assumption

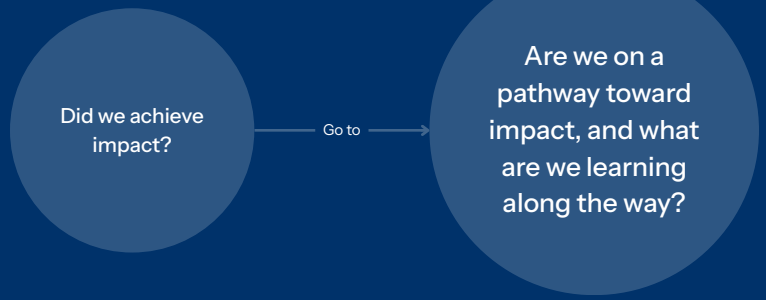
2 Principle 2: Design for learning-oriented pathways and capturing indications of Impact

Are we on a pathway toward meaningful change?

In most programs, impact is defined in terms of long-term outcomes: improved incomes, better health, sustained livelihoods. However, these changes take time and are influenced by multiple external factors. In practice, what programs encounter during implementation are early signals of change: shifts in behaviour, participation, access, or practices.

This principle focuses on designing measurement systems that capture these signals, referred to as emergent impact. Emergent impact refers to observable, early indications that a program is moving along a plausible pathway toward longer-term outcomes.

The shift is from:



These signals are closer to program influence and provide a basis for learning and course correction.

This principle is about shifting how impact is understood and measured.

What this means for funders in practice?

The following actions are not about reducing rigour. They are about focusing measurement on what can be meaningfully tracked and used during implementation.

- Treat proposals as starting points, not final definitions
- Define a core set of indicators, but allow flexibility
- Shift review conversations from targets to learning
- Signal that adaptation is acceptable-and expected

Why this matters?

Without this shift	With this shift
1) Programs are judged on outcomes that take years to materialise	1) Programs can track whether they are moving in the right direction
2) Measurement focuses on what is easy to report, not what is meaningful	2) Learning happens during implementation, not just at the end
3) Early warning signs are missed	3) Resources are used more effectively
4) Course correction becomes difficult or delayed	4) Impact pathways are strengthened over time

3 Principle 3: Practice prospective measurement to truly facilitate community-owned impact

How do we ensure measurement supports decisions during implementation?

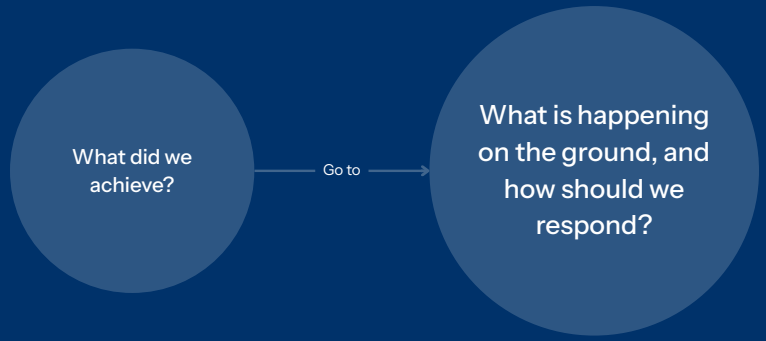
Impact measurement is often conducted retrospectively, through evaluations that assess results after a program has been completed. However, by the time findings emerge, opportunities to improve implementation have already passed.

This principle focuses on shifting measurement from a retrospective exercise to a prospective, ongoing practice: one that is embedded within implementation and used to guide decisions as programs unfold.

In this approach, measurement is not separate from program delivery.
It becomes part of how programs are managed, reviewed, and adapted in real time.

This includes using regular check-ins on progress, feedback from frontline teams and insights from communities to continuously assess what is working, what is not, and what needs to change.

The shift is from:



This principle is about ensuring that evidence is not just collected—but actively used.

What this means for funders in practice?

The following actions focus on ensuring that measurement is embedded within program execution, not treated as a parallel or endline function.

- Integrate measurement into program routines, not just reporting cycles
- Encourage use of frontline insights in decision-making
- Support simple, real-time data systems for ongoing tracking
- Ensure program adaptations are documented and reflected upon

Why this matters?

Without this shift

1) Data is collected but not used for decisions
2) Programs continue without responding to emerging challenges
3) Learning happens too late to influence outcomes
4) Communities remain passive recipients rather than active informants

With this shift

1) Programs adapt in response to real-time evidence
2) Frontline experience informs program decisions
3) Community realities are reflected in how programs evolve
4) Measurement becomes a tool for improving implementation, not just reporting results

Layer 2: The Five-stage SIMM Lifecycle

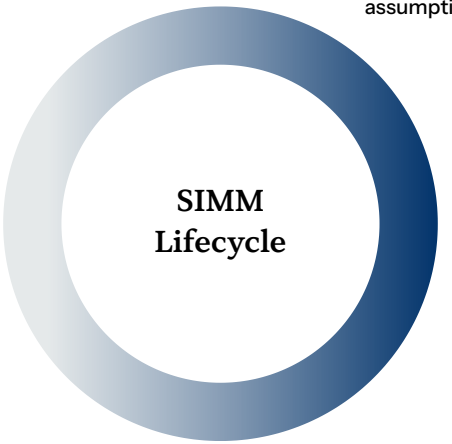
The SIMM lifecycle outlines how impact measurement should be approached across the program/portfolio journey. Rather than treating measurement as a one-time activity or an endline exercise, this approach positions it as a continuous, cyclical process, where learning, reflection, and adaptation happen throughout implementation. Each stage represents a shift in how programs are designed, implemented, and reviewed.

Stage 1: Framing Impact

What are we trying to change, for whom, and why?

Stage 2: Designing the Measurement Architecture

What outcomes, pathways, assumptions, and evidence will guide us?



Stage 3. Embedding Measurement in Practice

How will measurement live inside implementation and generate ongoing insight?

Stage 4: Interpreting Evidence

What does the evidence actually tell us about change, context, and contribution?

Stage 5: Using Evidence for Decisions

How will findings shape strategy, implementation, accountability, and resourcing?

Stage 1: Framing Impact

What are we trying to change, for whom, and why?

This stage focuses on clarifying and defining what meaningful change looks like before program design begins. It ensures that programs are grounded in a shared understanding of the problem, rather than assumptions carried into design.

In practice, this often involves stakeholder mapping, community listening, and facilitated problem-framing processes that bring together funders, implementing organisations, and communities to define what matters most in that context.

Stage 2. Designing the Measurement Architecture

What outcomes, pathways, assumptions, and evidence will guide us?

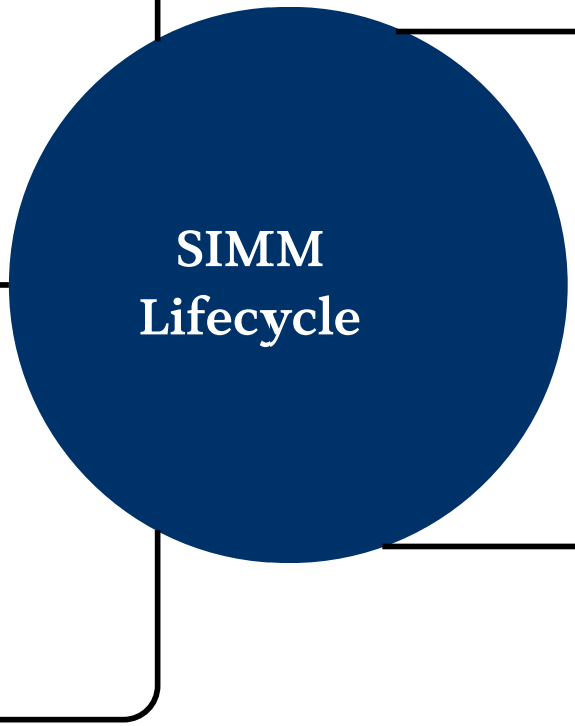
This stage focuses on translating the shared understanding of impact into a clear and practical measurement design. It connects program activities to intended outcomes and defines how progress will be understood over time.

In practice, this includes developing a theory of change, identifying a focused set of indicators, clarifying key assumptions, and designing data collection approaches that are both meaningful and feasible.

Stage 3. Embedding Measurement in Practice

How will measurement live inside implementation and generate ongoing insight?

This stage focuses on integrating measurement into everyday program implementation so that teams can learn from evidence as programs unfold. Measurement becomes part of routine management rather than a parallel reporting requirement.
In practice, this includes setting up simple data systems, enabling regular review discussions, capturing frontline insights, and creating feedback loops that allow implementation to respond in real time.



Stage 4. Interpreting Evidence

What does the evidence actually tell us about change, context, and contribution?

This stage focuses on making sense of the evidence being generated. It goes beyond tracking indicators to understanding what those indicators mean in context, and whether they reflect meaningful change.
In practice, this involves analysing patterns across data, triangulating qualitative and quantitative insights, and engaging program teams and communities in interpreting what is happening and why.

Stage 5. Using Evidence for Decisions

How will findings shape strategy, implementation, accountability, and resourcing?

This stage focuses on ensuring that learning leads to action. Measurement becomes valuable when it informs program design, strategic direction, and resource allocation.

In practice, this includes adapting program models, revising assumptions, shifting funding priorities, and embedding learning into ongoing decision-making processes.

To see the case studies for each of the stages, refer to Annexure C.

Layer 3: Funder Actions across the SIMM Lifecycle

While multiple actors contribute to impact, this approach is funder-led by design. This layer shows what funders need to enable SPO leadership, frontline and MEL teams, communities, and system actors at each stage of the SIMM lifecycle.

The Stakeholder Matrix below provides a quick view of the key actions funders should enable with each stakeholder at every stage of the SIMM lifecycle.

	With SPO Leadership	With Frontline/MEL Teams	With Communities	With Government/ System Actors
Stage 1: Framing Impact	Fund and facilitate structured problem-framing, outcome definition, and pre-design assessments	Create spaces for field insights through workshops and integrate implementation realities into program design	Build in participatory exercises (FGDs, mapping) to validate community priorities and define locally relevant outcomes	Engage system stakeholders to map schemes, data systems, and early integration points
Stage 2: Designing Measurement Architecture	Co-develop Theory of Change including outcome-aligned indicators & keep key 8–10 core indicators that can be tracked over time	Pilot data tools before rollout to test for feasibility and refine tools based on field feedback	Ensure indicators are aligned with community needs	Align indicators with administrative data ensuring reporting compatibility
Stage 3: Embedding Measurement in Practice	Fund MEL roles and conduct regular review meetings on data collection and management systems to track and document program adaptations	Invest in simple tools, dashboards, and real-time data use for decision-making	Establish continuous feedback loops and track unintended effects during implementation	Share implementation insights aligning delivery with system realities
Stage 4: Interpreting Evidence	Facilitate joint reflection sessions and encourage honest discussions focussing on “why” not just “what”	Use mixed data (qual + quant) to integrate field insights into evidence	Validate findings with communities to refine interpretations based on lived experience	Support data sharing, align implementation with system processes, and enable convergence
Stage 5: Using Evidence for Decisions	Link learning to funding decisions, supporting adaptive program redesign	Enable continuous learning and documentation of field realities into implementation cycles	Share findings back with communities and get their feedback for program redesign	Use evidence to inform policy dialogue and support integration into public systems

To see the detailed Action Checklists across the SIMM Lifecycle, refer to Annexure D.

Layer 4: Adoption Rubric across the Five SIMM Stages

While the previous layers outline what good SIMM practice looks like, organisations often struggle to understand where they currently stand and what to prioritise.

The Adoption Rubric is a structured tool that helps organisations assess how well measurement is functioning across the five stages of the SIMM lifecycle. Rather than acting as a compliance checklist, the rubric is designed as a reflection and decision-support tool. It helps surface gaps between how measurement is intended to function and how it is actually being used in practice.

By using the rubric, funders can identify:

- where SIMM practices are already strong,
- where systems are partially developed, and
- where foundational elements are still missing.

What the Rubric Assesses

The rubric assesses practice across the five stages of the SIMM lifecycle:

- Framing Impact
- Designing Measurement Architecture
- Embedding Measurement in Practice
- Interpreting Evidence
- Using Evidence for Decisions

Each stage includes a small number of clearly defined dimensions that reflect observable actions, such as whether funders convene partners before program design, whether MEL is adequately funded, or whether evidence is actually used in decision-making. This ensures that the rubric remains grounded in practice, rather than abstract principles.

Important:

These levels should not be interpreted as a measure of performance, but as a way of understanding how consistently and effectively a practice is implemented.

- This is not a performance score
- It is a practice maturity score

The goal is not to reach "4" everywhere, but to understand: Where are we strong, and where do we need to improve?

In most cases, funders will find variation across programs. The rubric helps identify whether practices are:

- portfolio-wide
- limited to specific partners
- or dependent on individual teams

From Assessment to Action

The rubric is intended to be used alongside the stage-wise action guidance presented earlier in this approach.

- The rubric identifies where gaps exist
- The checklists and guidance outline what actions can address those gaps

Together, they provide a pathway from: diagnosis → prioritisation → action

Using the Rubric in Practice

The rubric is designed to be applied through a structured, funder-led process involving:

- Individual reflection across internal teams
- Collective discussion to interpret results
- Identification of priority shifts
- Translation of gaps into concrete actions

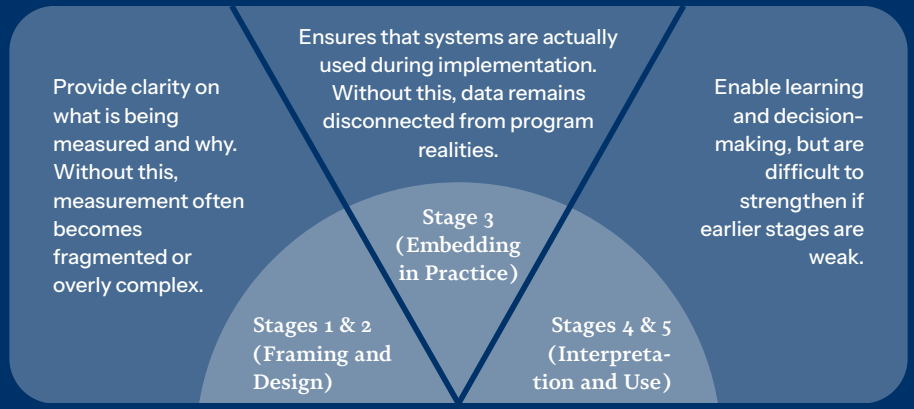
How the Scoring Works

Each dimension is assessed on a four-level scale that reflects the maturity of practice:

Absent	Emerging	Functional	Embedded
The practice is not in place or exists only symbolically	The practice exists in limited or inconsistent ways (e.g., only in some programs or teams)	The practice is implemented in many programs and influences decisions	The practice is standard, consistent, and sustained across the organisation

Where to Start

Not all stages require equal attention at the same time.
In practice, improvement tends to follow a broad progression:



To access the full Adoption Rubric and Detailed User Guide, refer to Annexure E.

End Notes

The Development Management–anchored SIMM approach is designed to shift how impact measurement is understood and practised: from a technical or reporting requirement to a shared governance and management process that supports learning, accountability, and better decision-making.
At the same time, we recognise that applying this in practice is not straightforward.

The Indian development and funding ecosystem is diverse and complex. Funders operate with different mandates, timelines, risk appetites, and constraints. Organisations vary in size, capacity, and access to resources. In many cases, existing reporting structures, compliance requirements, and operational pressures shape what is possible.

This approach is therefore not a prescription or a fixed model. It is intended as a guiding structure that can be adapted based on context.

Organisations and funders may enter this approach at different points. Some may already have strong elements of measurement design but may need to strengthen how evidence is used in decision-making. Others may need to revisit how impact itself is framed. Not all stages require equal attention at the same time, and progress will often be iterative rather than linear.

While the approach may appear simple in its structure, we recognise that the shifts it proposes, particularly around incentives, power, and decision-making are not easy. They require changes not only in tools and processes, but in how organisations and funders work with each other.

The intention is not to present an idealised model, but to start a more practical conversation:

- What is already possible within current constraints?
- Where can small shifts be made?
- How can measurement better support learning and decision-making in real contexts?

A few practical considerations are critical for implementation:

Incentives for learning and transparency: Across the sector, organisations often hesitate to surface challenges or disconfirming evidence due to concerns around reputation or funding. For this approach to work, funders and leaders must actively create a space where learning, adaptation, and course correction are recognised as responsible practice—not failure.

Avoiding additional burden: This approach is not intended to add new layers of reporting or complexity. Measurement should support implementation, not sit outside it. This requires simplifying tools, aligning data collection with program workflows, and ensuring that both SPOs and funders focus only on what is useful for decision-making. When measurement adds value, it is adopted; when it adds burden, it is resisted.

Working within existing systems: Most organisations already use Theories of Change, results frameworks, and donor reporting formats. This approach does not replace these—it strengthens how they are used. The focus is on making existing systems more reflective, adaptive, and connected to real decision-making.

The approach is meant to be used, adapted, tested, and refined over time.

For organisations and funders interested in applying this approach or exploring how to begin this journey in their own context, further support, guidance, and facilitation can be provided by 4th Wheel Social Impact and ISDM.

Annexures

Annexure A - How was this approach developed?

This approach was developed over two phases of work between 4th Wheel Social Impact and ISDM, combining prior sector research, literature review, funder and practitioner insights, and iterative validation.

It builds on earlier work undertaken in 2024–25, particularly the Impact or Illusion study, which examined how Social Purpose Organisations in India understand and practise social impact measurement. That study highlighted a recurring pattern: many organisations were collecting data and reporting results, but were often unable to use measurement meaningfully for learning, adaptation, or decision-making. It also showed that many of the barriers were not only technical, but linked to incentives, capacity, donor expectations, and broader ecosystem dynamics.

Building on these findings, the next phase of work in 2025–26 focused on developing a more grounded and practical approach for strengthening Social Impact Measurement and Management (SIMM). This phase included a review of 82 documents spanning impact assessment approaches, evaluation methodologies, development management thinking, and measurement practice. Alongside this, a methodology-to-principles mapping exercise was undertaken to identify the deeper ideas, assumptions, and recurring themes that sit beneath existing approaches and methods.

This process led to the identification of approximately 120 principles, i.e: the underlying ideas, assumptions, values, and recurring propositions about how impact should be understood, measured, interpreted, and used in practice. These were then synthesised by removing duplication, consolidating overlaps, and prioritising those most relevant to the real-world functioning of SIMM across strategy, design, implementation, interpretation, and use.

The approach was further informed by primary sector evidence. In addition to the Impact or Illusion study, insights were drawn from practitioners, monitoring and evaluation experts, and funders, including representatives from CSR foundations, family foundations, and international philanthropic organisations. This ensured that the approach was shaped not only by theory, but also by the realities of how impact is discussed and managed across different parts of the ecosystem.

An initial set of Development Management–anchored principles was then developed and taken into a process of validation through a Core Working Group (CWG) comprising funders, nonprofit leaders, consultants, intermediaries, and sector experts. Through structured reviews, workshops, and collective discussions, the principles and approach structure were refined further. This process helped sharpen the approach's practical orientation, strengthen its relevance across different organisational contexts, and clarify the central role of funders in shaping the conditions under which SIMM operates.

The resulting approach is therefore grounded in both research and practice. It builds on prior field evidence, draws from diverse bodies of literature, and has been refined through critical engagement with actors across funding, implementation, and advisory roles. It is intended not as a fixed model, but as a practical architecture for improving how SIMM is understood and used in the Indian development context.

Annexure B - How is the approach relevant for varied funder typologies?

Funders do not operate as a single category. They differ in their mandates, time horizons, reporting pressures, and orientation to risk, learning, and evidence. Any approach intended to strengthen Social Impact Measurement and Management must therefore be relevant across different funding contexts. Broadly, this approach may be particularly useful across three overlapping funder typologies.

1. Downstream Implementation Funders: These funders support program delivery directly and often prioritise outputs, implementation efficiency, and visible results. This category includes many CSR actors and program-focused grantmakers.

For such funders, the approach offers a way to strengthen how measurement informs implementation decisions, rather than functioning only as a reporting mechanism. It helps shift SIMM from tracking delivery alone to understanding whether programs are actually moving toward meaningful change.

2. Ecosystem Enablers or Field-Building Funders: These funders invest in strengthening organisations, networks, knowledge systems, capacities, and sector infrastructure. Their work often extends beyond individual programs toward improving the broader conditions within which impact can be achieved.

For these funders, the approach provides a way to think more intentionally about how measurement can support learning, alignment, and institutional strengthening across multiple organisations. It is particularly relevant where the goal is not only to assess program performance, but to improve the quality of impact practice across the ecosystem.

3. Systems-Oriented Funders: These funders seek to influence policies, institutions, behaviours, incentives, and wider system conditions over time. Their work often involves greater complexity, longer time horizons, and a stronger interest in contribution rather than direct attribution.

For these funders, the approach helps position measurement as a live process of interpretation, adaptation, and strategic learning in contexts where change is non-linear and distributed across actors. It supports a shift from proving isolated results to understanding how programs contribute to broader change.

These categories are not rigid. A single funder may span more than one orientation, and many may be at different stages of transition across their portfolio. The purpose of naming these typologies is not to rank them, but to recognise that the path toward stronger SIMM will look different depending on where a funder starts. Across all typologies, however, the core shift remains the same: from reporting-led measurement to decision-led, learning-oriented SIMM.

Annexure C - Case Studies

Stage 1. Framing Impact

What are we trying to change, for whom, and why?

This stage focuses on defining what meaningful change looks like before program design begins.

Case Example: Framing the Right Problem in Migrant Worker Settlements

A funder set out to support the living conditions of migrant construction workers residing in temporary settlements near urban construction sites. The initial assumption was straightforward: the key issue was inadequate WASH infrastructure. The program was therefore expected to focus on improving access to toilets, drinking water, and basic sanitation facilities.

However, before finalising the program design, the funder created space for a more grounded framing process. This included structured discussions with the implementing organisation, consultations with field teams who had experience working in construction settlements, and participatory exercises with workers and their families. **Rather than relying only on standard surveys, the team used simple participatory methods such as community discussions, prioritisation games, and hypothetical budget exercises to understand what residents themselves saw as the most urgent needs**.

These conversations shifted the understanding of the problem quite significantly. While water and sanitation were important, residents consistently raised mosquito infestation, stagnant water, and the lack of regular fumigation as more immediate concerns affecting daily life, especially for children. Field teams also pointed to the temporary and mobile nature of these settlements, which meant that a narrow infrastructure response would not by itself address the living conditions workers were most concerned about. At the same time, discussions with local actors highlighted that some entitlements and services relevant to migrant workers were already available through existing government schemes, but were poorly accessed.

As a result, the program moved away from a pre-fixed understanding of impact as “improved access to toilets and water” and instead reframed impact more broadly around safer and healthier living conditions in migrant settlements. This created space to consider a different mix of responses: not only basic infrastructure where relevant, but also pest control, access to public services, and stronger linkages with existing government provisions for migrant workers.

What made this shift possible was not a better survey instrument alone. It was the fact that the funder did not treat the initial proposal as the final definition of the problem. By supporting a needs assessment, enabling participatory processes through partners, and creating room for field and community insights before program design was fixed, the funder was able to frame the intervention around what mattered most in that context.

This illustrates why Framing Impact is such a critical first stage. If this stage is weak,

programs often begin with the wrong problem definition and spend the rest of the cycle measuring progress against assumptions that were never adequately tested. **When done well, this stage helps ensure that what is being measured is grounded in reality, shared across stakeholders, and relevant to the communities the program intends to serve**.

Stage 2. Designing the Measurement Architecture

What outcomes, pathways, assumptions, and evidence will guide us?

This stage focuses on translating the shared understanding of impact into a measurement design that explains how change is expected to happen and how it will be tracked.

Case Example: Moving from Activity Tracking to Outcome-Based Measurement in Urban Waste Management

A funder was supporting a large-scale urban waste management program operating across multiple cities. The program worked at three interconnected levels: engaging households to improve waste segregation and reduce dumping hotspots, strengthening the working conditions and capacities of waste pickers and collectors, and supporting local government systems to improve waste management processes.

While the program was ambitious in scope, its measurement approach remained limited. The implementing organisation primarily reported on activities-such as the number of households reached, distribution of materials like segregation bags, and occasional narrative updates from field interactions.

Engagements with waste pickers and government stakeholders were documented inconsistently, and there was little clarity on what kinds of changes the program was actually trying to achieve across these different actors.

Recognising this gap, the funder shifted focus from reporting outputs to building a more structured measurement architecture. Instead of asking for more data, the funder worked with the organisation to clarify what meaningful change would look like across each level of the program.

This began with jointly developing a Theory of Change that mapped how different activities-household engagement, waste picker support, and government collaboration-were expected to lead to improved waste management outcomes. Importantly, this process was not treated as a one-time documentation exercise, but as a way to align the organisation's understanding of its own work.

From this, the funder and the organisation identified a small set of core indicators (typically four to five per stakeholder group) that reflected meaningful progress. For example, instead of only tracking the number of households reached, the program began to track early behavioural shifts in waste segregation practices. Similarly, indicators for waste pickers focused not just on participation, but on improvements in working conditions and income stability. For government engagement, the focus shifted toward tracking the nature and frequency of collaboration, rather than simply recording meetings.

The funder also supported the organisation in grounding these indicators in realistic timelines-distinguishing between what could reasonably change over six months versus what would take longer to observe. This helped prevent overpromising on outcomes that required sustained engagement over time.

Equally important was the investment in systems and capacity. **The funder provided simple tools and templates aligned to the defined indicators, trained program and MEL teams on how to use them, and supported a gradual transition from paper-based reporting to basic digital systems. This included introducing Excel-based trackers and later more structured digital tools to improve data consistency and accessibility. Alongside this, the funder created space for teams to reflect on data quality and feasibility, ensuring that the system could be sustained in practice.**

Over time, this shift enabled the organisation to move from fragmented reporting toward a more coherent understanding of how change was unfolding across different parts of the program. Data was no longer limited to activity logs, but began to reflect whether the program was progressing along its intended pathways.

This case illustrates the importance of **Designing the Measurement Architecture** as a distinct stage. Without a clear approach linking activities to outcomes, measurement often becomes a collection of disconnected data points. When done well, this stage provides a shared structure that helps organisations focus on what matters, collect data that is feasible and meaningful, and build systems that support learning over time.

Stage 3. Embedding Measurement in Practice

How will measurement live inside implementation and generate ongoing insight?

This stage focuses on integrating measurement into everyday program implementation so that teams can learn from evidence as programs unfold. Measurement becomes part of routine program management rather than a separate reporting activity.

Case Example: Making Implementation Responsive in a Solar Irrigation program

A funder was supporting a solar irrigation program aimed at improving water access for smallholder farmers through the installation of solar-powered systems. In its early stages, implementation was largely driven by delivery targets: systems installed, locations covered, and farmers onboarded. While this provided a clear view of rollout progress, it offered limited insight into how these systems were functioning once installed.

Recognising this gap, the funder focused on strengthening how data was generated and used during implementation itself, rather than waiting for periodic evaluations. This began with expanding the scope of what was tracked. Alongside installation data, the program started capturing the operational status of systems over time; whether they continued to function, how frequently they faced issues, and how long it took to resolve them.

To support this, the funder worked closely with the implementing partner to put in place simple but structured systems. Field teams began using standardised templates to report not just on delivery, but on the status of systems after installation.

Basic digital trackers and dashboards were introduced so that data from different locations could be aggregated and reviewed. At the same time, clear responsibilities were assigned within teams to ensure that data was consistently collected and updated.

What made the difference, however, was not the tools alone, but how they were used. The funder established regular review spaces like monthly meetings where data was not just presented, but discussed. These conversations moved beyond tracking progress against targets to asking what the data was revealing about implementation. Field teams were encouraged to share what they were observing on the ground, and patterns began to emerge across locations.

It became visible, for instance, that systems in certain areas were breaking down within months. Repairs were often delayed because there were no trained technicians available locally. In many cases, communities were unclear about who was responsible for maintenance, leading to further delays and disuse. These were not isolated issues, but recurring patterns that became visible only because data was being reviewed systematically.

Because these insights surfaced while the program was still ongoing, they could immediately inform decisions. The program began investing in training local technicians, clarifying ownership and maintenance responsibilities, and strengthening support systems to ensure quicker repairs. Attention gradually shifted from installation alone to ensuring that systems remained functional over time. In this way, implementation evolved from being a one-directional process of delivery to a more responsive cycle of action and reflection. Data was no longer something collected for reporting at the end of a period; it became a tool for understanding what was happening in real time and adjusting accordingly. While the program had not yet redefined its overall goals at this stage, it had become far more grounded in reality, with the ability to respond to emerging challenges as they unfolded.

Stage 4: Interpreting Evidence

What does the evidence actually tell us about change, context, and contribution?

Case Example: Rethinking Outcomes in a Girls' Scholarship program

This stage focuses on analysing and interpreting evidence to understand what is happening in the program and why.
A scholarship program in rural tribal areas of Maharashtra was designed with a clear dual objective: to ensure that girls did not drop out of school during secondary education, and in doing so, to delay early marriage. Scholarships were provided to girls in Grades 8, 9, and 10, with continued support for those who progressed to Grades 11 and 12.

Over time, the program began to show strong results on its immediate goals. More girls were staying in school, completing secondary education, and transitioning into higher secondary levels. Dropout rates had reduced significantly, and on paper, the program appeared to be achieving both educational retention and, implicitly, a delay in early marriage.

However, because the program remained closely engaged with communities and continued to track what happened beyond schooling, it began to observe a more complex reality. While girls were completing their education, many were still getting married soon after finishing school.

The assumption that keeping girls in school would automatically lead to delayed marriage and expanded life choices did not fully hold. At this stage, the data itself was not insufficient, it clearly showed improvements in educational outcomes. The shift came in how this evidence was interpreted. The program began to question whether school completion alone was an adequate proxy for empowerment or delayed marriage in that context.

Through deeper engagement with girls, families, and field teams, it became evident that while education had increased, the surrounding ecosystem had not changed in ways that supported alternative pathways. There were limited livelihood opportunities, few viable options for continued engagement after school, and strong social norms that continued to shape expectations around marriage.

This led to a critical realisation: the program had been measuring a necessary step in the pathway, but not the outcome it ultimately cared about. Education was enabling progress, but it was not sufficient to shift longer-term trajectories without corresponding changes in opportunities and agency. This interpretation of evidence prompted a rethinking of the program's scope. Over time, the program expanded beyond scholarships to include vocational skill training and livelihood-oriented pathways for girls who completed their education. The focus shifted from not just keeping girls in school, but also enabling what came after-creating conditions where education could translate into meaningful choices.

Stage 5: Using Evidence for Decisions

How will findings shape strategy, implementation, accountability, and resourcing?

This stage focuses on ensuring that evidence leads to meaningful decisions and improvements. Measurement becomes valuable when insights influence program design, strategic planning, and organisational learning.

Case Example: Redesigning a Maternal and Neonatal Health Program

A maternal and neonatal health program in urban informal settlements was initially designed around improving awareness and access. The approach focused on providing antenatal care information, nutrition guidance, and encouraging institutional deliveries, with the assumption that informed women would make better health decisions.

As the program progressed, data showed that while awareness levels were increasing and services were being accessed, improvements in behaviour and outcomes were uneven. Because the program had already invested in generating and reviewing data, and had begun to interpret these patterns in relation to lived realities, it was able to move beyond surface-level indicators.

What emerged was a deeper understanding of how decisions were actually made within households. Women often did not have full autonomy over their health choices. Mothers-in-law played a significant role in shaping decisions related to diet and care-seeking. Male family members influenced mobility, expenditure, and access to services. Gender norms

defined what was acceptable and possible, regardless of what women knew.

Rather than continuing to invest primarily in awareness-building and individual-level counselling, the program used this learning to fundamentally rethink its approach.

This led to a redesign of both program strategy and funding allocation. The intervention expanded beyond women to actively engage other members of the household. Sessions were designed for mothers-in-law and male family members, recognising their role in decision-making. Counselling shifted from individual interactions to household-level engagement. The program also began to address underlying gender norms explicitly, rather than assuming behaviour change would follow information.

Importantly, funding priorities shifted alongside program design. Resources were no longer concentrated only on awareness campaigns and home visits. Investment increased in community engagement processes, facilitation of group discussions, and interventions that addressed relational and social dynamics within households.

Measurement also evolved to reflect these changes, capturing shifts in household support systems, decision-making patterns, and enabling environments for women, rather than focusing only on individual knowledge or service uptake. This was not an incremental adjustment. It was a shift in how the program understood both the problem and its role within it. By using learning to reshape not just activities but also resource allocation and strategic focus, the program became more aligned with how change actually occurred in that context.

Over time, this made the program more effective not because it did more, but because it did what was necessary.

Annexure C - Detailed Checklists

Stage 1. Framing Impact

What are we trying to change, for whom, and why?

A. Working with SPO Leadership	
Action	Conduct structured discussions (workshops/consultations) with SPOs beyond proposal review
	Use a standard template to define problem statement, outcomes, and key assumptions
	Fund a needs assessment/baseline/exploratory study before program design

B. Integrating Frontline/MEL Inputs	
Action	Conduct field visits/consultations with frontline staff before finalising program design
	Document implementation realities (constraints, risks, feasibility) from field teams
	Incorporate frontline insights into defining outcomes and measurement approach

C. Grounding in Community Realities	
Action	Fund and enable participatory exercises through partners (e.g., community discussions, mapping, prioritisation tools)
	Validate program priorities with community members before finalisation
	Identify locally relevant definitions of success or change

D. Alignment with Government/Systems	
Action	Conduct alignment discussions with relevant government/system actors
	Map relevant schemes, policies, or system linkages for the program
	Identify opportunities for integration with existing public systems

Stage 2: Designing Measurement Architecture

What outcomes, pathways, assumptions, and evidence will guide us?

A. Working with SPO Leadership	
Action	Co-develop a Theory of Change linking activities to outcomes
	Identify and document key assumptions behind program design
	Define a small set of core indicators (approx. 8–10) aligned to outcomes
	Include dedicated budgets for MEL roles, data collection, and data systems in program design

B. Working with Frontline/MEL Teams	
Action	Provide orientation/training to program and MEL teams on the Theory of Change, indicators, and reporting expectations
	Assess whether proposed indicators are feasible to collect across partner contexts
	Refine indicators and reporting formats based on partner and MEL team feedback

C. Validating with Communities	
Action	Ensure program outcomes reflect community-defined change, not only donor-defined outputs
	Enable partners to test whether proposed outcomes and indicators reflect locally meaningful change
	Allow space for context-specific indicators where community priorities differ across locations

D. Alignment with Government/Systems	
Action	Align program indicators with available administrative data where relevant
	Ensure compatibility with reporting requirements of system actors
	Establish checkpoints for revising measurement design if needed

Stage 3: Embedding Measurement in Practice

How will measurement generate insight during implementation?

A. Working with SPO Leadership	
Action	Establish regular program review meetings (monthly/quarterly)
	Use data and evidence as part of routine program discussions
	Document program changes and reasons for those changes
	Review whether data collection frequency and formats are realistic for partners and adjust where needed

B. Working with Frontline/MEL Teams	
Action	Set up simple digital systems, dashboards, or trackers for ongoing data collection and visibility
	Assign clear roles for collecting, updating, and reviewing implementation data
	Enable frontline and MEL teams to interpret data and flag issues through simple formats (notes, trackers, escalation channels)

C. Engaging Communities	
Action	Establish periodic community feedback mechanisms during implementation
	Validate program priorities with community members before finalisation
	Identify locally relevant definitions of success or change

D. Alignment with Government/Systems	
Action	Share implementation progress and insights with relevant system actors
	Enable access to relevant administrative or system data where possible
	Align program implementation with system processes and constraints

Stage 4: Interpreting Evidence

What does the evidence tell us about change and context?

A. Working with SPO Leadership	
Action	Conduct structured reflection sessions to review findings
	Analyse results in relation to program pathways and assumptions
	Discuss both successes and challenges openly

B. Working with Frontline/MEL Teams	
Action	Integrate field insights into interpretation of results
	Examine patterns, anomalies, and unexpected findings
	Use both qualitative and quantitative data for analysis

C. Validating with Communities	
Action	Share findings with community members for validation
	Collect feedback on whether findings reflect lived experiences
	Refine interpretations based on community inputs

D. Alignment with Government/Systems	
Action	Consider policy and system-level factors when interpreting results
	Engage system actors in reviewing and interpreting findings
	Incorporate system constraints into understanding program outcomes

Stage 5: Using Evidence for Decisions

How is evidence used to adapt programs and strategies?

A. Working with SPO Leadership	
Action	Use evidence to revise program design or strategy
	Link funding decisions to program performance and learning
	Encourage and support program adaptation based on findings

B. Working with Frontline/MEL Teams	
Action	Track changes made during implementation and reasons for those changes
	Integrate learning into ongoing program delivery
	Share lessons with program and leadership teams
	Document lessons and adaptations in formats that can be accessed and reused across programs

C. Engaging Communities	
Action	Share program findings with communities
	Incorporate community feedback into program redesign
	Ensure future priorities reflect community needs

D. Alignment with Government/Systems	
Action	Use program evidence to inform discussions with system actors
	Identify opportunities to influence policy or system design
	Share learnings for integration into broader system-level decisions

The following tables provide a more detailed description of what SIMM practice looks like at each level of maturity across the five stages. Organisations can review each dimension and identify which description best reflects their current practice.

Flip to the next page

Annexure E - Adoption Rubric

Stage 1. Framing Impact

Question: Are funders putting in place concrete processes to define impact with the right stakeholders, before program design is fixed?

Dimension	1. Absent	2. Emerging	3. Functional	4. Embedded
Engagement with SPO leadership and field teams	programs are designed primarily through proposal submissions with little or no structured discussions with SPOs or field teams before finalisation	Some discussions with SPOs happen after proposal submission (e.g., clarifications), but no structured co-framing or partner convenings exist	Structured discussions/workshops are conducted with SPOs to refine problem statements and outcomes; in some cases, multiple partners are brought together for alignment	Joint problem-framing workshops, partner convenings, and review circles are standard; multiple SPOs and field teams collectively shape priorities, assumptions, and program design before finalisation
Community grounding of impact	No direct community engagement before program design; reliance on secondary data or partner assumptions	Basic consultations (e.g., surveys or informal discussions) are conducted in some programs, but are limited in depth and not consistently funded or prioritised	Participatory exercises (e.g., FGDs, community meetings, simple mapping) are conducted in most programs; budgets are allocated for community engagement through partners	Community engagement is systematically designed and funded; partners are capacitated to use participatory and innovative methods (e.g., community mapping, journey mapping, participatory ranking); community inputs directly shape outcomes and program design
Alignment with systems and context	No structured engagement with government or system actors; no mapping of schemes, data, or system linkages	Some informal discussions with government stakeholders or basic awareness of schemes exists, but no structured mapping or integration approach	Relevant schemes, policies, and system actors are mapped in most programs; discussions with departments are conducted; program design considers alignment with systems and available data	Structured engagement with government/system actors is standard; administrative data, schemes, and delivery systems are actively used; clear pathways for integration, convergence, or scale within public systems are built into program framing

Stage 2. Designing the Measurement Architecture

Question: Have funders put in place a clear, usable, and scalable measurement architecture that partners can realistically implement and sustain?

Dimension	1. Absent	2. Emerging	3. Functional	4. Embedded
Outcome framework/ Theory of Change at portfolio or thematic level	No clear Theory of Change or outcome framework; each partner defines outcomes independently through proposals	A broad framework exists, but is either too generic or not consistently used across partners	A clear Theory of Change or outcome framework is defined at program, thematic, or portfolio level and used to guide most partners	A well-defined outcome framework is standard; partners align to it while retaining flexibility for context-specific pathways and outcomes
Lean and shared indicators across partners	Indicators are numerous, inconsistent, and mostly defined separately by each partner	Some common indicators exist, but are too many, unclear, or not consistently used	A focused set of core indicators (approx. 8–10) is used across most partners, enabling comparison and learning	A clear set of lean, decision-useful indicators is standard across partners; indicators enable cross-learning and are periodically refined based on use
Dedicated funding and capacity for MEL and data systems	No dedicated funding for MEL; partners are expected to manage data collection, reporting, and analysis within program budgets without additional support	Limited or one-time support (e.g., templates, small allocations, or external evaluations) is provided, but no sustained investment in MEL roles, systems, or capacity	Funding includes dedicated budgets for MEL roles, data collection, and basic systems in most programs; partners receive some training and support	Dedicated MEL funding is built into program design; partners are resourced with MEL teams, data systems, and ongoing capacity-building support to collect, analyse, and use data effectively

Stage 3. Embedding Measurement in Practice

Question: Are funders ensuring that data systems are actively used during implementation in a practical, manageable, and consistent way?

Dimension	1. Absent	2. Emerging	3. Functional	4. Embedded
Use of data systems and dashboards in implementation	Data is collected but remains in reports or files with little real-time visibility or use	Some dashboards or consolidated views exist, but are not regularly used by teams	Dashboards or tracking systems are used in most programs to monitor progress during implementation	Dashboards are actively used across programs; teams regularly access and use data for tracking progress and identifying issues
Data collection is manageable and aligned to program realities	Data collection is excessive, frequent, or unrealistic for partners, leading to poor quality or superficial reporting	Some attempt to streamline data collection, but frequency or volume is still misaligned with program realities	Data collection timelines and processes are practical in most programs (e.g., aligned to program milestones rather than arbitrary timelines)	Data collection is intentionally designed to be lean, realistic, and aligned to program cycles; partners can maintain data quality without overload
Teams (program + MEL) are able to run the system in practice	Partners lack the time, capacity, or clarity to manage data collection and reporting effectively	Some individuals manage data, but processes are inconsistent and dependent on specific people	Program and MEL teams are able to collect, update, and manage data in most programs using defined processes	Teams across levels (program, MEL, management) are confident in running data systems; data flows are consistent, timely, and reliable across programs

Stage 4. Interpreting Evidence

Question: Are funders and partners making sense of data in a structured and honest way to understand what is happening and why?

Dimension	1. Absent	2. Emerging	3. Functional	4. Embedded
Interpretation goes beyond numbers (patterns, trends, changes over time)	Data is reviewed mainly as numbers (targets, outputs) with little discussion on meaning	Some effort is made to interpret data, but remains descriptive or one-time	In most programs, teams analyse patterns, trends, and changes over time	Interpretation consistently focuses on patterns over time and what they indicate about program performance
Different types of evidence are used together (not just one source)	Only one type of data (usually quantitative) is used to interpret results	Some qualitative inputs are used, but not consistently or meaningfully	Both qualitative and quantitative data are used together in most program reviews	Multiple sources of evidence (data, field insights, community feedback) are consistently combined to build a fuller understanding
Multiple stakeholders are involved in making sense of data	Interpretation is done by a single group (e.g., funder or senior management)	Some partner inputs are included, but discussions are not structured or regular	SPOs and program teams are involved in interpretation in most programs	Interpretation is collaborative and structured; SPOs, frontline teams, and relevant stakeholders regularly contribute perspectives
Challenges, unintended outcomes, and gaps are actively discussed	Discussions focus mainly on achievements; challenges or gaps are avoided	Some challenges are discussed, but selectively or without depth	In most programs, challenges and gaps are discussed along with possible reasons	Honest discussion of challenges, unintended outcomes, and gaps is standard and used to deepen understanding of what is happening

Stage 5. Using Evidence for Decisions

Question: Is evidence used to make decisions, shared with stakeholders, and carried forward to improve future programs?

Dimension	1. Absent	2. Emerging	3. Functional	4. Embedded
Evidence leads to program and funding decisions	Findings are documented in reports but do not influence program design, funding, or continuation decisions	Some changes are made, but are informal or inconsistently linked to evidence	In most programs, evidence informs program adjustments, continuation, or redesign decisions	Acting on evidence is standard practice; program design, funding, scaling, and exit decisions are consistently based on learning and documented changes
Findings are shared and discussed with stakeholders (SPOs, communities, system actors)	Findings are not shared, or only communi-cated one-way (e.g., reports)	Findings are shared occasionally, but without structured discussion or feedback	Findings are discussed with key stakeholders in many programs to gather perspectives	Structured feedback spaces (e.g., review forums, learning sessions) are regularly used to discuss findings with SPOs, communities, and system actors
Learning is captured and used across programs (knowledge systems)	Learning remains within reports or individual programs and is not reused	Some learning is documented, but not easily accessible or consistently used	Learning is documented and used across programs in many cases	Strong knowledge systems exist; learning is systematically captured, shared, and actively used to inform future program design, funding strategies, and cross-program decisions

How Funders Should Use the Adoption Rubric

The rubric is designed to be used as an organisational diagnostic and decision-making exercise, rather than a general reflection tool. It is most effective when applied periodically (typically once every 12–18 months) to review how measurement is functioning across programs and to identify where shifts are needed.

Step 1: Take the Diagnostic Individually

It is recommended that:

- 4–6 individuals within the funding organisation complete the survey
- Participants include:

1. Senior leadership
2. Program / portfolio managers
3. MEL or impact teams (if available)
4. Frontline or field teams (where relevant)
5. Community representative(s)

Each individual should respond based on their understanding of how the organisation actually operates, not how it is intended to operate.
This step is critical because it captures:

- differences in internal perception
- gaps between leadership intent and implementation reality
- variations in how SIMM systems are experienced across teams

Step 2: Review Scores Collectively

Once responses are compiled, the group should come together to review the results. At this stage, the focus should not be on the scores themselves, but on what they reveal.

Three guiding questions can help structure this discussion:
1. Where are we consistently weak or uneven?
Which stages or dimensions show low or inconsistent scores across respondents?

2. Where do perceptions differ significantly?
Are there areas where leadership scores high, but program teams score lower (or vice versa)?

3. Where are practices dependent on specific teams or programs?
Are strong practices limited to a few teams, geographies, or donor-supported initiatives, rather than being organisation-wide?

These questions help shift the conversation from:
"What is our score?" to
"What is actually happening across our portfolio?"

Step 3: Identify 2–3 Priority Shifts

The purpose of the rubric is not to fix everything at once.
Based on the discussion, funders should identify two to three priority shifts that will have the greatest impact on strengthening SIMM practice.

For example:

- strengthening how programs are framed with partners (Stage 1)
- introducing a common outcome framework and indicators (Stage 2)
- ensuring data systems are actually used during implementation (Stage 3)
- linking evidence more directly to funding decisions (Stage 5)

Focusing on a small number of shifts ensures that change is feasible and sustained, rather than fragmented.

Step 4: Translate Gaps into Action

Once priorities are identified, the next step is to translate them into concrete actions. The rubric itself highlights what is missing. The stage-wise checklists (presented earlier in the approach in Layer 3) provide guidance on what can be done.

For example:

- If there is limited engagement with SPOs before program design → introduce joint problem-framing workshops or partner convenings
- If MEL is underfunded → include dedicated budgets for MEL roles and data systems
- If data is not used in implementation → establish dashboards and regular review spaces
- If findings are not discussed → create structured learning sessions with partners

This linkage ensures that the rubric leads directly to practical changes in how funders design, manage, and review programs.

Step 5: Prioritise and Sequence Improvements

Not all stages of the SIMM lifecycle need equal attention at the same time. In practice, improvement tends to follow a broad progression:

- Stages 1 and 2 (Framing and Design) establish clarity on what is being measured and why. Without this, later stages often become fragmented or overly complex.
- Stage 3 (Embedding in Practice) ensures that systems are actually used during implementation. Without this, data remains disconnected from program realities.
- Stages 4 and 5 (Interpretation and Use) enable learning and decision-making.

However, these are difficult to strengthen if earlier stages are weak or inconsistent.

Step 6: Revisit and Track Progress Over Time

The rubric should be revisited periodically (typically every 12–18 months) to assess whether practices have strengthened.

Over time, funders should expect to see gradual movement:

- from Emerging → Functional → Embedded

Progress may not be uniform across all stages, and that is expected. The objective is not to achieve perfect scores, but to ensure that measurement increasingly supports:

- better program design
- more informed decisions
- stronger alignment across stakeholders

A Note on Variation Across Partners

Funders often work with multiple partners operating at different levels of capacity.

The rubric should therefore be interpreted at a portfolio level, by asking:

- Are these practices in place across most programs?
- Or are they limited to a few strong partners or pilot initiatives?

A practice should be considered strong only when it is consistently applied across a significant portion of the portfolio, not just in isolated cases.

This helps ensure that improvements are systemic, rather than dependent on individual organisations or teams.

What This Enables

When used well, the rubric helps funders move from fragmented measurement practices to a more coherent, learning-oriented approach across their portfolio.

It creates a structured way to:

- reflect on current systems
- align internal teams
- prioritise realistic improvements
- and track progress over time

Ultimately, the value of the rubric lies not in the scores themselves, but in the decisions and changes that follow from it.

ISDM

INDIAN SCHOOL OF
DEVELOPMENT MANAGEMENT