

Charity impact measurement template

This template is designed to help charities and community groups identify what they want to achieve, measure progress and collect evidence of their impact. This template is provided for general guidance and information purposes only and does not constitute financial, legal, regulatory or professional advice.

Organisations should adapt the template to reflect their own circumstances and seek independent professional advice where appropriate. Markel Direct accepts no responsibility for any loss arising from reliance on the information contained in this template.

Complete the sections that are relevant to your charity, community group, project or service. Start by defining the change you want to achieve, then identify how you will measure progress, collect evidence and review the results. You can duplicate the worksheets if you need to assess more than one activity.



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Impact measurement planning

Project name: _____

Start date: _____

Project lead: _____

Review date: _____

What are you trying to achieve?

Project objective

What problem are you addressing?

What change do you want to see?

Who are your beneficiaries or the people you support?

Beneficiary group

Who is receiving support?

Estimated number of beneficiaries: _____

Outcomes and key performance indicators (KPIs)

Intended outcome	KPI	Data source	Collection frequency	Target
Example: Volunteers to feel more confident in their roles	Example: Percentage of volunteers reporting increased confidence	Example: Volunteer survey	Example: Quarterly	Example: 80%

Data collection log

Measure	How will data be collected?	Who is responsible?	Next collection date
Example: Attendance	Example: Sign-in sheet	Example: Volunteer coordinator	Example: 31 March 2027

Qualitative evidence tracker

Case studies, interviews and feedback			
Source	Key findings	Date	Permission to use
Examples: • Beneficiary interview • Volunteer feedback • Testimonial			
Where personal information is collected, organisations should ensure they comply with applicable data protection legislation and obtain any necessary permissions or consents.			

Results and review

Results summary			
KPI	Target	Actual result	Target met?

What worked well?

What challenges did you encounter?

What did you learn?

What will you improve?



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