10 Key Considerations When Choosing Your Impact Management System (IMS)

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Impact is complex and can take years or even decades to manifest. Managing the wide range of different factors involved in any impactful project, and then demonstrating the numerous types of impact over varying timeframes, frequently poses a significant challenge to institutions and individuals.

There are various methods that can be used to respond to the growing demands of impact; one involves the implementation of an **Impact Management System (IMS)**, which can help to centralize the disparate threads of impact activity and catalyze the development of a supportive culture across an entire institution.

However, in this rapidly evolving area, there are many factors to be taken into account when considering the adoption of such a solution.

Our top ten tips should help to give you a frame of reference for this particular route:

1. How easy is the system to use?

One of the biggest inhibitors to the successful adoption of an Impact Management System is the ease of its use.

Your busy academics and researchers are already occupied full-time with their research projects, teaching and other activities, so introducing a new system that requires them to spend more time logging activities, managing and assigning evidence, and configuring reports can be arduous and act as a deterrent.

An Impact Management System should make it easy to integrate a focus on impact into your team's day-to-day activities, actively reducing the time it takes to carry out impactful activities and acting as a central point for managing research projects and their impact. It should streamline tasks such as evidence collection (see point 7), planning and reporting.

Furthermore, you will likely already be using a number of systems to manage various aspects of research - from CRIS or RIMS through to institutional repositories and even proprietary systems. Having to implement another platform in addition to your existing infrastructure can be both convoluted and

unwieldy, especially if there is no way to automatically feed data between your research and impact platforms.

Often, if these systems are mutually incompatible, your teams will end up having to manually duplicate data, ushering in an unwelcome additional administrative burden while introducing the possibility of human error. During hectic periods such as national assessment deadlines, this can create stress, overwork and further increase the likelihood of inconsistencies between important data.

It is however likely that your established research platforms are not easily modified or replaced. When looking for your impact system, then, look for one that is built to open standards and is capable of integration with research systems, either through standard APIs or via custom connector development.

Is the Impact Management System able to interface with your wider technological ecosystem, without creating additional manual labor or duplication of data? Can it seamlessly include relevant research information, such as outputs, within impact projects and case studies?

Does the system provide an easily-accessible central repository for all impact activities, and can it be continually updated without the need to replicate data? Can it actively support academics in aligning their activities with impact, without creating additional time burdens?

2. Does it make repurposing information for different audiences easy?

Even outside of grant applications and national assessments, impact is playing an increasingly critical role in establishing institutional reputation and attracting potential funding or collaboration from far-reaching sources.

In parallel, we are seeing increasing numbers of institutions aligning their research strategies to the UN's Sustainable Development Goals (SDGs).

It is vital to show the various different types of impact you are achieving, but also to be able to relate these to a variety of frameworks and standards that are understood globally. And beyond this, the ability to broadcast the quality of your work far and wide is hugely beneficial, as there are opportunities across the globe to enter into vital partnerships that match common skills, resources or objectives to achieve positive results.

Impact Management Systems that support different standards, or have structures and processes in place to match your impact to initiatives such as national assessments, organizational reporting or even evolving Rankings requirements, can support you in terms of boosting reputation and attracting collaboration or funding.

You should look for a system that not only includes a range of frameworks as default or on request, but also one that has the capability to maximize the reach of your impact information for different audiences; whether that is for annual reports, case studies or rankings such as **THE Impact Rankings** for example.

Does the system provide support for a wide variety of impacts, but also accommodate different frameworks? Is it easy to publish non-sensitive information into the public domain and make this available to be identified and engaged with by relevant parties?

3. Can the platform support emerging frameworks?

Requirements for demonstrating research impact tend to ebb and flow, based on factors such as changing institutional priorities and the proximity of national assessments or other grant applications.

However overall the trajectory of impact is upwards - in the UK for example, the weighting of impact in the REF (Research Excellence Framework) increased from 20% in 2014 to 25% in 2021 - with the Unit of Assessment research environment statement requiring demonstration of how the institution has enabled impact during the submission window, further affecting the overall score. Meanwhile in Hong Kong the RAE (Research Assessment Exercise) 2020 introduced impact as a component for the first time, weighing in at 15% of the total score and creating an entirely new requirement for those submitting responses.

The ability to scale to meet varying levels of demand is critical. It is not uncommon for institutions to reallocate human resources or even hire additional staff before major submissions such as national assessments. This should also be a consideration when it comes to selecting an Impact Management System, which should be able to provide an appropriate level of resourcing, at a cost-effective price point, to support your impact needs as and when they evolve.

Furthermore, the emergence and convergence of various standards will continue; you need to ensure that you choose a flexible system that will both scale and adapt.

Does the system have the flexibility to scale when needed to meet additional (or reduced) workloads? Can it easily be rolled out to other areas of the institution, and can it accommodate international demand? Will it be easy to manage fluctuating staff numbers and peripatetic researchers?

4. Does the system support the development of an impact culture?

Transitioning to a way of operating that prioritizes impact across day-to-day activities and strategic objectives is often one of the greatest challenges faced by institutions and can be an irritatingly slow process.

We have already mentioned challenges around your colleagues' availability. You may be working with colleagues who would prefer to focus on blue skies over applied research. Perhaps institutional funding may not permit for the hiring or fulfillment of key impact roles in the build-up to a national assessment.

Furthermore, we have also mentioned the upwards trajectory of impact adoption, as well as the rapidly-increasing prevalence of sustainability mandates. In a post-COVID world, organizations will need to evolve, keeping up with the pace of these developments while also demonstrating leadership.

Some of this will always be out of your control, and not every functional impact culture will look the same.

However, you can help ease the transition by choosing a system that makes the introduction of impact easy and natural, rather than forcing your teams to fundamentally overhaul their ways of working. Furthermore, a platform that is designed to scale to future demand is essential, and while we do not know exactly what future regulatory environments or public demands will be, the flexibility to support an evolving impact culture will be a critical differentiator.

Senior management plays an important role in the development of strategy and communication of initiatives such as impact culture adoption, and can benefit from a system that makes impact submissions faster and more efficient.

Consider a platform that makes impact management low-touch - is it quick to gather evidence? Can I easily align projects to relevant impact indicators? Can I keep all my impact work in one location and not introduce multiple new interfaces to busy colleagues? Does the platform represent a continuation rather than a refresh of the team's ongoing research? Is there a robust set of training materials and opportunities available, helping you to continually educate you and your teams on impact-related issues?

5. Can the platform identify and track high-quality impact data?

Research projects that deliver social, environmental, economic, cultural or other impact tend to comprise a wide range of moving and fixed parts. These can include the underpinning research and outputs, an extensive variety of stakeholders and beneficiaries, evidence, monitoring of change over time, numerous activities and more.

Planning for the complexity of impact can also be a lengthy and grueling process. There are many structures and templates available to help, whether in mapping out the stakeholders of your project, deciding the activities and charting the pathways to impact, or providing mechanisms and structures for measuring the impact.

Furthermore, being able to definitively show impact through the continual generation of high-quality data, supported by evidence gathered on-the-go (see point 7) is essential when showing your credentials.

One solution is to look for an Impact Management System that centralizes all project management in a single environment. Through a responsive platform, your teams will be able to dynamically update plans and activities as they naturally evolve, while tracking impact and storing all relevant evidence on-the-go.

The platform should also be designed with impact in mind - is it supported by a robust underlying taxonomy of impact indicators?

Does the platform cover end-to-end impact management, from planning through capture to measurement and reporting? Can I centralize all my planning and project management in one location? Does this system reduce my dependence on several different templates and structures in different formats? Can I login once to view all relevant information on my impact project?

6. Does the system facilitate networking and collaboration?

Impact does not occur in isolation. Beyond the myriad stakeholders and activities involved, impactful projects often rely on contributions from numerous researchers and other participants to realize their full potential.

These could include co-authored outputs such as research papers, strategic input from experts in external fields, and as necessary in the production of high-quality impact case studies, a robust peer review process that involves parties from across different disciplines within the institution.

One of the downsides of traditional methods of information capture is that working on isolated documents, particularly those in hard or local copies, creates a single point of failure and cannot easily be shared. This can be particularly problematic when it comes to later stages in grant applications, where the clock is running down and researchers need contributions from busy senior colleagues or external contributors.

Consider an impact management platform that makes it easy to share critical components of an impact project, such as evidence or even draft case studies, without compromising on security and confidentiality requirements. This can look like a streamlined impact case study peer review system that can invite the relevant stakeholders to contribute comments within the centralized environment, making it much easier for researchers to get the feedback they need without having to worry about how best to disseminate their work.

Furthermore, a platform that supports networking by making it easy for users with related skills to connect helps support current and future impact initiatives, while aiding researchers on an individual level.

Does the system have appropriate security measures to partition off confidential information and only share relevant components of an impact project? Does it utilize leading technologies to enable collaboration through a cloud-based model, without having to compile numerous distinct pieces of feedback? Can all feedback be kept in a centralized location and easily actioned, updating project information in the same portal? Does it support an active impact community through networking features?

7. Does the system make collecting and utilizing evidence easy, rapid and secure?

Evidence collection is one of the key underpinning activities for reporting impact as claims need verification. It is also one of the most challenging when drafting impact narratives to get the exact evidence required to back up the claims being made.

It is responsible for some of the most stressful moments in the endgame of a national assessment submission, as you find yourself trawling back through years and years of information that may not exist, has been altered or even deleted.

And in general, impact without substantive supporting material - whether that's in the form of policy documents that detail change, glowing testimony of transformative results, irrefutable statistical data or otherwise - is at best hard to convincingly claim, and at worst instantly dismissable as baseless.

With that in mind, the facility for quickly storing and retrieving evidence should be an important criterion when considering your impact system.

Furthermore, the evidence, alongside all of your project and collaboration data, contribute towards the establishment of an Organizational Memory within your institution - one that can be easily accessed, and supports both historical information and the continual storage of new and emerging data.

The best platforms make collection of evidence easy, rapid and secure, freeze information at a point in time in case of modification or removal, and then make it easy to call upon the evidence at any point and assign this to impact case studies and project activities. Your focus should be on the experience of the users - will this be easy for them to do as they go? Will the platform support the construction of an Organizational Memory through incremental steps?

8. Is the platform future-proofed?

The growing prevalence of research impact shows no signs of slowing down. It is not sufficient just to apply a band aid such as a spreadsheet or standard collaboration workplace - impact initiatives must support future development, and accommodate potentially unknown territories.

An appropriate impact system must be one that not only supports the capture and demonstration of impact at the point of deployment, but also one that is

continually optimized and developed to be ahead of the impact curve. The platform should have a defined roadmap, but also be equipped to respond agilely to future trends. It might, for example, need to roll out new functionality to support an emerging framework or major new grant application process.

You should look for a system supported by a team with expertise in responding to the changing impact environment, and one that is continually developed to support rapidly evolving market trends r, but also to support emerging customer requests.

Does the system have sufficient current functionality, and is there a robust roadmap in place to continue supporting best practice for impact into the future? Is the platform responsive enough to introduce new features on-demand? Will it adapt to any potential regulatory or framework modifications without compromising the quality of the service or support for research impact? Does the vendor guide product development through market expertise?

9. Does the platform enable the amplification of impact, beyond existing frameworks?

Hugh McKenna (2020, p.9) notes that the Research Excellence Framework (REF) is responsible for the apportioning of roughly £2 billion of research funding every year in the UK - but also that the ability of successful institutions to fund human and physical resources then attracts additional research grants from sources such as research councils and major charities, effectively doubling this total.

For those countries that tie funding to a national assessment with an impact component, the cycle takes a period of years and there is no ability to influence this further in between submission periods. However, institutions involved in these frameworks do then benefit from the publication of their Impact Case Studies (ICS) on the assessing body's website.

Impact should not stop there, however. When choosing an Impact Management System, you should consider the options for planning and amplifying the impact of your activities. Global research collaboration has been disrupted due to the effects of COVID, but impact is continuous and long-term.

The right system should enable you to publicly showcase your impactful projects to attract relevant collaborators to help boost the impact - whether that's through improved public engagement, additional funding from relevant and

interested parties, or through contributions from individuals or organizations worldwide with similar skills that can help develop your initiative.

Furthermore, the process should be streamlined - you need to ensure that your work can be easily located by collaborators, but also by the public and other stakeholders, who can quickly identify the value and impact of your projects.

Does the system enable you to clearly demonstrate the impact of your work? Can it encourage additional parties to either learn about and understand your project, or to actively participate and support the development of your impact? Can you broadcast your work and gain reputation on a global scale? Are you able to leverage the platform to attract vital extra funding from different parties?

10. Can the system support internal collaboration between different institutional teams?

During its nascence, research impact was often the domain of an institution's centralized research office, which became responsible for co-ordinating projects and ensuring the alignment of research with impact goals.

More recently, however, additional teams across institutions have taken a more active role in developing and reporting on impact. Teams responsible for areas such as knowledge exchange and public engagement play vital roles in supporting many impactful projects, and are increasingly involved as a "one size fits all" approach to working with these different teams is unlikely to meet with success. Instead, you should focus on implementing an Impact Management System that empowers different users in various teams across the institution to collaborate on impact projects on their terms.

On the other hand, enabling public engagement teams to continually log their own activities, and to share relevant information and evidence with other teams across the institution - through a centralized portal - means you can maximize the value of the work they are already engaged in. A system that supports this level of sharing and varying user access supports not only the ability to centralize the work of distinct teams against a single impact project, but also the furthering of your Organizational Memory.

Does the platform facilitate streamlined collaboration across departments? Can it enable different teams with different objectives to continually share relevant information, while enabling users to easily assign relevant data and evidence to

targeted impact projects? Will it maximize the value of existing work that is carried out across your institution, without leading to confusion or duplication of data?

Next Steps

These ten tips provide a template to support you in selecting an appropriate impact system to support your institutional goals.

If you would like to explore any of the areas in more depth, please do feel free to contact us **via our website** or email **hello@vertigoventures.com**.

References

McKenna, H. P. (2020) Research impact. Springer.