

A background network diagram consisting of interconnected nodes and lines, rendered in shades of brown and gold, set against a light cream background. The nodes are represented by small circles, and the lines are thin, creating a complex web of connections.

# Healthy Institutional Impact Strategy Workbook

A practical workbook to help you design a healthy impact strategy

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# Introduction

Welcome!

This workbook is designed to help you develop a healthy institutional impact strategy, or assess opportunities to address gaps in existing strategies.

The sections in this guide walk you through a series of steps to develop not only a strategy but one which pays explicit attention to healthy practice. It has been developed in response to the practical realities of delivering impact, especially where resources are limited, pressure is high, and there are competing institutional priorities.

This workbook can be used by anyone seeking to establish or deliver a strategy for research impact. It is primarily aimed at institutional, research office, faculty, school (or similar) leaders, but as the opportunity to develop formal strategy varies greatly, it can be used by anyone where a strategic focus is useful. It may be particularly helpful for those new to impact leadership, working within time or financial restrictions, or those already seeing efforts becoming fragmented, misfocused or performative.

The sector varies extensively in how much impact is foregrounded in strategy and so this guide makes no assumptions about the strategy you currently have (or don't have), where you are located, what activities are already underway or your resources to achieve your goals. It also does not prescribe what institutions or individuals should include in their strategy as every circumstance will differ according to context, priorities, and goals. Instead, this workbook lays out a template to support your strategy development, whatever your starting point and context, and highlights where certain approaches may risk moving away from healthy impact practice.

Throughout the document we refer to 'your institution', a text shorthand to avoid detailing all possible variations by which this workbook is to be used. You are invited to replace this with terminology more suitable to your setting, such as department, faculty, team, partnership, project or even individual.

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## What do we mean by impact?

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Impact is a broad and sometimes contested concept, with multiple definitions across disciplines, sectors, and institutions. Its varying use can introduce confusion, especially where impact is taken to mean both societal effects and academic influence. Blurring these concepts risks halting efforts at the point of academic dissemination, weakening how much research is converted into societal change. It also risks applying misleading measures, ineffectively training the research community and breeding unnecessary tensions within the institution.

This workbook, and wider work on impact literacy anchors impact in change beyond academia. More specifically it defines impact as the *provable effects of research in the real world*<sup>1</sup>. Impacts are the **changes** we can see (demonstrate, measure, capture), **beyond academia** (in society, economy, environment) **which happen because of our research** (caused by, contributed to, attributable to). Impact may look and operate differently across disciplines, and can happen quickly or take a long time, but always relates to research being ‘activated’ outside academia.

For more on impact literacy, see the [Impact Literacy Workbook](#)<sup>2</sup>

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<sup>1</sup> Bayley, J. E., & Phipps, D. (2019). Building the concept of research impact literacy. *Evidence & Policy*, 15(4), 597-606. <https://doi.org/10.1332/174426417X15034894876108>

<sup>2</sup> Impact Literacy Workbook: <https://www.emeraldgroupublishing.com/impact-services#literacy-workbook>

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## What is an impact strategy?

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An impact strategy is a concise statement setting out how an institution intends to generate, support, and evidence the real-world effects of its research. It defines what impact means within the institution's context, identifies strategic priorities and areas of focus, and establishes the foundations needed to translate research into meaningful change beyond academia.

There is no 'one size fits all' way to develop or deliver an impact strategy, especially as delivery spans multiple teams, roles and connections. Strategy may be set at the institutional level, or within specific departments or teams, and may need to reflect a variety of policies and sector standards.

This workbook structures the strategy across the following seven sections:

- **Scope:** Parameters of the strategy, clarifying what and who it covers
- **Mission or vision:** Your ambition, and the change you're aiming to see
- **Values:** Any principles which guide your work
- **Approach:** A high level statement about *how* impact will be delivered
- **Roles and responsibilities:** High level accountability
- **Strategic goals:** Specific priorities which help you deliver your plans
- **Measures of success:** how you'll demonstrate – and what counts as – achievement

This will give you a base framework, from which you are welcome to expand to suit your context.

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# Why should you have an impact strategy?

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With so many - and so many potentially competing - pressures within the research landscape, it can be easy for impact to be:

- Tagged onto research strategies, treated as a natural consequence of the research process
- Tagged on to the research process, considered only after the research is complete
- Asserted as ambition, without due attention to the labour, effort and skills required
- Focused on reputation building achievements, rather than meaningful societal change
- Reduced to countable endpoints, such as case study scores
- Overlooked, disinvested in or marginalised against more urgent or traditionally prestigious activities
- Measured without due recognition of individual contributions

A clear impact strategy is essential for turning ambition into meaningful real-world outcomes. It shifts impact from being viewed as a hopeful by-product of research to an intentional, long term commitment which is valued by the institution. A strategy also establishes any necessary parameters within a landscape of competing possibilities and pressures, helping to align effort and focus collective attention on meaningful goals.

## **Reasons to have an impact strategy**

- ✓ Set focus, scope and boundaries within a landscape of endless possibilities
- ✓ Set the coordinated basis for action, decision making and prioritisation
- ✓ Align and optimise efforts, especially within resource limited environments.
- ✓ Move from hope to intention
- ✓ Validate and signal the importance of impact as part of institutional vision
- ✓ Make impact a shared priority
- ✓ Legitimate resources
- ✓ Set the basis for tracking progress and evaluating success
- ✓ Reduce uncertainty about priorities, expectations, and what is valued
- ✓ Strengthen accountability and consistency

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## How does strategy support healthy practice?

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A **healthy impact institution** clarifies, creates, values, and supports the conditions needed to deliver research impact beyond academia. It recognises that impact requires sustained effort, coordination, investment in skills and capacity, and strong external relationships, and establishes a supportive culture with impact-literate staff. An **unhealthy impact institution** expects impact without creating the necessary capacity, skills, coordination, or strategic clarity. It treats impact as an afterthought, underplays the importance of building strong and trusted external relationships, and fosters a negative culture in which staff lack confidence. In practice, healthy and unhealthy operate along a continuum, and an institution's current footprint may reflect an early or emerging approach to impact, differing institutional priorities, or practical limitations in time, infrastructure, and resource, rather than an inherently poor approach.

**An impact strategy sets the foundations for institutional efforts.** At its best, a strategy provides a clear basis for *healthy* impact practice, signaling pursuit of meaningful benefits through shared and acknowledged action. At its worst, a poorly conceived strategy legitimates *unhealthy* practices, prioritising reputational gain over meaningful societal benefit and encouraging performative rather than purposeful activity. In doing so it can overlook the actual skills and capacity needed and weaken the conditions needed to deliver on goals.

### **Health warning**

Healthy impact practice depends not simply on having a strategy but on the extent to which that strategy is meaningfully implemented and supported across the institution. An implementation plan is needed to translate these intentions into coordinated action breaking them down into discrete objectives, activities, resources, risks, detailed roles and monitoring.

To support this this workbook should be used in conjunction with the [Institutional Healthcheck Workbook](#)<sup>3</sup>

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<sup>3</sup> Institutional Healthcheck Workbook - <https://www.emeraldgrouppublishing.com/impact-services#literacy-workbookprinciple>

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## Using this workbook

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No single guide or workbook can accommodate every variation in practice, nor assume your starting point, access to strategic materials, or familiarity with impact activity. This workbook is therefore designed to be flexible and adaptable to different contexts and needs. It can be used in two main ways:

- To create a new impact strategy
- To assess existing strategy/ies, and determine where additional strategy may be needed

### Workbook structure

**1**

Firstly, you are invited to establish your starting point by exploring any impact related strategies already in place, what they specify about impact, and what opportunity you have to make a change.

**2**

Secondly, you are guided you through each area of strategy, covering what the area is, why it matters, including examples, considerations, and a corresponding health warning. In each section you are provided with a prompt question to consider and capture your thoughts, before narrowing these into a draft statement for inclusion in a final strategy.

**3**

To bring this all together, there is a blank Impact Strategy template at the end of the document into which you can assemble these statements.

## **Health warning**

### **Engagement is key for developing healthy strategy**

Central to the success of any strategy is engagement with those who will contribute, those it affects, and those who have insights into what impact is meaningful. **Engagement is also critical for ensuring that diverse perspectives are actively included**, to identify and mitigate any unintended or disproportionate consequences for Equality, Diversity and Inclusion.

Example ways to engage include:

- Staff wide consultations, such as open forums, departmental meetings, 1-2-1 discussions and online methods (such as semi-structured surveys)
- Engagement with non-academic partners, through events or outreach methods most suited to them
- Consultation with key representatives, such as workers unions, and groups for disability, genders, caring responsibilities etc
- Working with human resources to locate this work in relevant policies and staff contract considerations
- Key committees, such as for research, innovation and career progression
- Setting up cross-institution impact working groups
- Engaging with external impact networks to gather ideas, share best practice, and seek insights into what works.

This workbook intentionally avoids prescribing the nature or extent of consultation, recognising that this will depend on context and available resources. Setting rigid expectations for engagement can place demands on time, labour, and capacity that many people are unable to meet. Instead, the key recommendation is to **engage as fully and widely as possible within your context.**

## Step 1: Establish your starting point

Before designing a new impact strategy, it is important to establish if there is already anything in place. Sometimes there is a dedicated impact strategy, but commonly impact is featured or alluded to in various other documents such as:

- Institutional research strategy
- Faculty research strategy
- Commercialisation strategy
- Innovation strategy
- Civic responsibility commitment

Together these will indicate what the institution is committed to delivering, how it expects to deliver it, and what it deems to be 'success'.

**Question: What impact or impact related strategies are already in place?**

## Assess your Strategies

The table below lists some of the key elements which need be strategically clear for a healthy approach to impact. Using the existing strategies you have assembled, note what is already in place or expected for each element. *This may include direct reference in the strategy, or the picture they collectively build.* Finally decide if you feel this aspect is **clear** or **unclear**, or if it is currently **absent** from your strategies.

Element needing clarity	Content from Strategies	Clear	Unclear	Absent
What 'impact' means in your context		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The distinction between academic and non-academic impact		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The extent to which impact arises from research, rather than wider institutional activities		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Underpinning values which guide impact		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How impact is generated (approach)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Who has overall responsibility for impact		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic goals		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What counts as success		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How success is measured		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Strategy Assessment Outcome

Using the information you've assembled, now summarise your starting point:

We are strategically clear on	We are strategically unclear or inconsistent on	We have no strategic stance on

Finally, summarise what your opportunity is to develop a new strategy, or address strategic gaps in another way to support healthy impact.

**The strategic development opportunity is:**

Now build your strategy one step at a time

## Step 2: Build your impact strategy

### Scope

**Scope** sets the parameters of the strategy.

Impact is a broad and sometimes contested concept, with multiple definitions across disciplines, sectors, and institutions. Given the near-limitless possibilities for achieving impact, scope creates necessary boundaries. It identifies what sits **within** the remit of your strategy and what sits **beyond** it. **Scope** provides clear parameters, ensuring that everyone involved understands how impact is being interpreted and pursued in your specific context, enabling more strategic use of time, resources, and partnerships.

The Scope section:

- **Clarifies the coverage** of the strategy, i.e. who it relates to
- **Clarifies what impact means** in this context *and what is out of scope*
- **Clarifies the *basis of the impact***, such as research, teaching or wider institutional activities, *and what is out of scope*
- **Sets any other necessary boundaries**, including any hard lines (*includes, excludes*) or soft lines (*prioritises, focuses on*)
- **Provides the foundations for shared understanding, aligned action and consistent decision making**

Common blurred lines include conflating academic with non-academic benefit, and conflating research with non-research led change. An impact literate approach reflects the ‘real world’ benefits of research. NB: whilst this workbook advocates for building strategy in this respect, it recognises that contexts vary and institutions may wish to set different parameters.

#### Examples

- a) This strategy covers non-academic impact arising from our research [*most research impact & impact literate focused*]
- b) This strategy covers non-academic impact, arising from our research, knowledge exchange, teaching, training and other institutional activities [*societal benefit of the institution focused*]
- c) This strategy covers both influence on the academic sector and non-academic impact, from our research [*broader contributions of research focused*]
- d) This strategy covers both influence on the academic sector and non-academic impact, from our research, knowledge exchange, teaching, training and other institutional activities [*general influence focused*].

⚠ **Health warning:** Clarity about the distinction between academic and non-academic impact is essential to build understanding, support consistent decision making and reduce the risks of conflating academic efforts with societal change. Whilst there may be a natural wish to embrace all forms of benefit, combining the two is likely to breed conflicting expectations or misdirected activity. Influence within academia is typically covered in traditional research activities (eg. grants, publications, creative outputs) and career progression processes; a distinct focus on societal impact is needed to complement this.

**Question: What are the parameters needed for *your* strategy?**

Using the list below – and adding any further lines as necessary – consider what is within scope ('yes') vs. out of scope ('no') for your strategy<sup>4</sup>.

Element	Yes	No	Your notes
Disciplinary research	<input type="checkbox"/>	<input type="checkbox"/>	
Interdisciplinary research	<input type="checkbox"/>	<input type="checkbox"/>	
Student research	<input type="checkbox"/>	<input type="checkbox"/>	
Efforts of research staff	<input type="checkbox"/>	<input type="checkbox"/>	
Efforts of non research staff (eg. professional services)	<input type="checkbox"/>	<input type="checkbox"/>	
Efforts of, and collaboration with, non-academic partners	<input type="checkbox"/>	<input type="checkbox"/>	
Changes arising from research	<input type="checkbox"/>	<input type="checkbox"/>	
Changes arising from wider institutional activities (ie. not just research)	<input type="checkbox"/>	<input type="checkbox"/>	
Changes arising from research <i>findings</i>	<input type="checkbox"/>	<input type="checkbox"/>	
Changes arising from <i>any aspect</i> of the research process (eg. methods)	<input type="checkbox"/>	<input type="checkbox"/>	

<sup>4</sup> You can respond to all or some of these options as suits

Change beyond academia ('societal impact')	<input type="checkbox"/>	<input type="checkbox"/>	
Influence within academia ('academic impact')	<input type="checkbox"/>	<input type="checkbox"/>	
Local effects	<input type="checkbox"/>	<input type="checkbox"/>	
Regional effects	<input type="checkbox"/>	<input type="checkbox"/>	
National effects	<input type="checkbox"/>	<input type="checkbox"/>	
International effects	<input type="checkbox"/>	<input type="checkbox"/>	
Strategy is relevant for the whole institution	<input type="checkbox"/>	<input type="checkbox"/>	
Strategy is relevant for a specific team/unit <i>only</i>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	

<b>Strategy statement</b>	<p><b>This strategy covers:</b></p>
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## Mission or vision

### Mission or vision sets the direction and ambition of the strategy

This is variously presented as:

- **Mission**, defining what you are seeking to do and the meaningful contribution you aim to make, *and/or*
- **Vision**, a clear picture of the future that the institution is striving to help create

However it is framed, this section represents the core statement of intent, acting as a beacon for decision-making, prioritisation and activities around a shared purpose. In complex institutions, where multiple teams, disciplines, and projects may operate simultaneously, mission helps people identify the contribution they can make.

Examples	
Mission	Vision
To undertake high quality, interdisciplinary research in partnership with our community to support regional growth	A vibrant regional community, with thriving businesses, opportunities for young people and excellent public services, underpinned by evidence base policy
To deliver high quality, problem-focused, applied research, combining expertise across multiple specialisms, to address systemic barriers in mental health	People able to live healthy, independent lives free from stigma, with fast and equitable access to mental health services, effective treatment and dignified care.
To provide innovative, evidence based solutions to address conservation risks in the natural world	A sustainable future with restored natural systems, climate resilience, thriving wildlife and environmentally responsible communities
To discover, interpret and share insights into our history, working in partnership with the sector to unveil hidden histories, preserve our heritage, and boost cultural awareness	A more accurate, equitable and inclusive account of our social history, celebrating a diversity of figures, with an engaged public driving a rich, vibrant and economically stable cultural sector

⚠ **Health warning:** The distinct contribution of the institution – such as providing high quality research – may well feature in the mission. However, for an impact strategy the mission/vision needs to extend beyond provision and into more clearly articulated real-world change.

Questions	
What are you seeking to do? [mission]	What words describe the 'end results' you're aiming for? [vision]

<b>Strategy statement</b>	<p><b>Our mission is to:</b></p>    <p><b>Our vision is of:</b></p>
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# Values

**Values** set the principles by which the strategy has been, and will be, put in place.

While mission and vision describe an institution's ambitions and intended contribution, values shape how those ambitions are pursued in practice. They influence what's prioritised, how decisions are made, how people work together, which partnerships are formed, and what behaviours and practices are considered acceptable, ethical, and desirable.

Values such as collaboration, inclusivity, integrity, transparency, and co-creation recognise that the way impact is created matters as much as the outcomes achieved. While an institution may achieve its objectives, impact developed through practices that exclude voices, concentrate power, or undermine trust may ultimately lack legitimacy and long-term sustainability.

Although many institutions publicly support widely accepted principles such as Equality, Diversity and Inclusion (EDI), sustainability, or social responsibility, the real distinction lies in how values are prioritised when difficult choices or trade-offs emerge. Values become most visible in decisions about funding, partnerships, and strategic direction - for example, whether to work with oil and gas companies, defence institutions, or military partners. In practice, institutional values are demonstrated both through statements of principle and the decisions made when ethical, financial, political, or reputational pressures conflict.

## Examples

- **Relational values:** in partnership, engaged, collaboration, co-creation, participation, trust, reciprocity, respect, shared, accessible, community centred, expert partner, dialogue
- **Ethical values:** integrity, fairness, accountability, transparency, equality, equity, inclusive, diversity, openness, authenticity, justice, culturally sensitive, environmentally sustainable, decolonised, choice *not* to work with certain industries, non-extractive
- **Impact values:** sustainability, public benefit, social responsibility, meaningful
- **Learning values:** reflexivity, curiosity, adaptability, shared learning, innovative
- **Research values:** excellence, diverse, problem-focused, disciplinary, interdisciplinary

⚠ **Health warning:** An impact strategy is unlikely to remain healthy if values are treated as aspirations or tick-box commitments rather than principles embedded in practice. It may be socially or institutionally desirable to signal commitments to collaboration, inclusivity, transparency, or co-creation, but where these values are not operationalised through governance, partnerships and day-to-day behaviours, they risk becoming tokenistic. A disconnect between stated values and actual practice can undermine trust, weaken credibility, and create inconsistencies between strategic ambition and lived experience. Healthy impact strategies therefore require values to be actively enacted, resourced, and reflected in how power, responsibility, recognition, and participation are shared across the work.

**Question: What are values that not only guide you, but are the foundations of your approach?**

Strategy statement

**Our impact values are:**

# Approach

**Approach** explains - at a high level - *how* impact will be delivered.

Approach provides an overview of the principal ways impact will be generated, such as through partnership working, stakeholder engagement, knowledge exchange, co-production, or commercialisation. In doing so, it identifies the broad pathways through which research will influence policy, practice, communities, or wider systems.

The specific ways in which impact is generated will vary across individual projects, and its inclusion in a strategy is not intended to create a fixed boundary or prescriptive plan. Instead, it is intended to signal the breadth of ways research may lead to impact, indicating any priority pathways if they exist, and indicating any pathways which are not suitable in a particular setting.

The detailed delivery of the approach - including specific activities, timelines, responsibilities, risks and resources - is set out separately within an implementation plan.

## Considerations

- **Research basis:** Impact is prioritised from specified areas of research vs. all research; Fundamental vs. applied; disciplinary vs. interdisciplinary; individuals vs. research centres
- **Partnerships and Pathways:** Commercial (e.g. patent, licenses, industrial partnerships, consultancy and spin outs); non-commercial (e.g. community engagement); policy engagement; advisory roles; via teaching; appointments across sectors (eg. Clinical-academic posts);
- **Institutional community:** Drawing on expertise across the institution including researchers, professional services and leadership; including students

⚠ **Health warning:** You may actively welcome all impact pathways, and your strategy may well indicate a breadth of approaches. However, resource limitations may create pressures to prioritise or divert resources to certain paths, creating tension and fostering distrust when signals and support do not align. Whilst circumstances may unexpectedly curtail intentions, a strategic stance can help establish the necessary foundations to preserve a range of approaches or clarify any restrictions.

<b>Question: How can you best characterise your approach to impact?</b>				
Indicate any main (primary) routes, acceptable paths, or anything that not part of your approach to impact				
<b>Approach</b>	<b>Primary route</b>	<b>Acceptable</b>	<b>Excluded</b>	<b>Your notes</b>
<b>Non-commercial engagement</b>				
Policy engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Public engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Engagement with specific communities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Commercialisation</b>				
Patents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Trademark	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Licensing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Industrial partnerships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Consultancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Spin outs / start ups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Other</b>				
Specialist advisory roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Teaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Cross-sector appointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Within the institution</b>				
From specific areas of research expertise (eg. research centres)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
From any research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Through interdisciplinary research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Involving students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Involving professional services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	



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## Roles and Responsibilities

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In an impact strategy, **roles and responsibilities** sets *high level* accountability.

Including roles and responsibilities within the strategy creates clear accountability for its direction, coordination, and delivery, ensuring ownership is visible rather than assumed. Identifying high-level leadership within the strategy also clarifies oversight and strengthens institutional governance. This accountability does not necessarily need to sit with a single individual or role, particularly given that impact activity often spans multiple teams and functions. Oversight may instead be provided through a combination of roles, committees, or other suitable governance structures. Embedding accountability within the strategy helps sustain momentum over time, as clear ownership supports continuity even when priorities compete or leadership changes.

### Examples

- This strategy is overseen by the Pro-Vice Chancellor for Research and Innovation.
- This strategy is overseen by the Associate Dean for Research (for governance) and Director of Research Services (for delivery)
- Commercialisation and industry partnership are led by the Technology Transfer Office.
- Policy engagement is led by the Policy Engagement Office

⚠ **Health warning:** Strategic roles and responsibilities need to align with who has authority and understanding of the area in practice. If not, nominated leads become accountable without the means to drive action, or authorise actions without clarity on implications.

**Question: Who is responsible for impact in your context?**

**Question: Who of these has overall responsibility for impact?**

**Strategy statement**

**This strategy is overseen by:**

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# Strategic Goals

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## Strategic goals set out your priorities.

Strategic goals translate ambition into clear priorities, helping to focus energy, resources, and attention on the areas of greatest importance. For goals to be effective, they should encourage meaningful progress and change in support of the overall vision, while remaining achievable within the institution's capacity, resources, and timeframes. Goals that are too abstract or unattainable can weaken momentum, whereas goals grounded in practical realities help build confidence, credibility, and sustained commitment.

Clear strategic goals also strengthen accountability and learning. By defining what progress looks like, they provide a fairer basis for monitoring performance, evaluating success, and assessing whether activity is contributing to meaningful impact. They also create a shared framework to connect activities, supporting a coherent rather than fragmented approach. This helps leaders and stakeholders understand not only whether work is taking place, but whether it is moving the institution in the intended longer term direction.

### Examples

- Embed impact within institutional systems, structures and processes, ensuring impact is systematically integrated from the outset of all research.
- Establish and sustain partnerships with key regional and national policy makers, aligning research to societal challenges and accelerating research uptake
- Build institutional impact capacity across all career stages, through enabling structures, impact literate governance, reward and recognition, and training and development
- Become a recognised Centre of Excellence in applied, impact focused research

⚠ **Health warning:** There may be a temptation to frame goals around reputation or visibility rather than genuine change. Institutions can easily drift towards impressive sounding aspirations that do little to advance meaningful impact. Effective strategic goals avoid this trap by remaining grounded in the outcomes the institution genuinely wants to create

**Questions: What are your strategic goals? What are the major step changes you want to achieve?**

**Our strategic goals are:**

**Strategy statement**

# Measures of Success

## Measures of success sets out how you'll recognise – and what counts as - achievement

Measures of success provide a high-level indication of what success looks like and how the institution will know whether its strategy has delivered on its aims. These measures capture the broader outcomes and changes the strategy is intended to achieve, typically within a defined timeframe. To be meaningful, they should connect clearly to the institution's Strategic Goals, ensuring that evaluation focuses on what matters most rather than simply what is easiest to measure.

Evidence of success may be both quantitative and qualitative. Quantitative indicators might include reach, uptake, or measurable changes in policy or practice, while qualitative indicators may capture influence, relationships, stakeholder perceptions, or case-based evidence of change. Together, these measures provide a balanced foundation for evaluating progress over time and for gathering evidence in a purposeful and consistent way.

### Examples. By [date]:

- Impact will be systematically embedded across institutional systems, evidenced by inclusion in workload modelling for all researchers, within job descriptions for all research and research management staff, and a formal component of promotion and progression criteria
- Strategic partnerships with regional and national policy stakeholders are significantly expanded and sustained, evidenced by a  $\geq 3x$  increase in multi-year and repeat collaborations.
- $\geq 70\%$  of externally funded projects will have stakeholder engagement or be co-produced with non-academic partners.
- We will have evidenced growth and diversification of research outputs, with a year on year increase in the publication of non-traditional outputs, non-academic co-authored works, and engagement with non-academic audiences.
- 100% of research and research management staff are trained in impact, with annual cohorts for impact leadership
- A distributed model of impact leadership is established, with trained impact leads embedded across all departments.
- The institution is externally recognised for as a Centre for Excellence, evidenced by growth in commissions for impact-related work, invitations to advise, and leadership roles in national/international initiatives.

⚠ **Health warning:** The need to measure may encourage institutions to seek out what can be counted, rather than what counts. Caution is needed in using inappropriate endpoints, irresponsibly using metrics or conflating reputational markers with indicators of societal change.

Question: What are your markers of success?	
Qualitative markers	Quantitative markers

**Question: What are the timeframes for these measures of success?**

Blank area for response to the question.

**Our measures of success are:**

**Strategy statement**

Blank area for response to the question, with a green vertical bar on the left side.

## Summary

This step by step process has aimed to highlight key aspects of an impact strategy, and help you *design in* healthy practice.

It has guided you through components of an impact strategy, first establishing your starting point and then helping you define your scope, mission, vision, values, approach, responsibility, goals, and measures of success. More importantly it has aimed to help you recognise risks to healthy practice that can be unintentionally amplified through strategy, and where attention is needed to avoid reinforcing unhealthy approaches. You are invited to bring these elements together into a clear, concise strategy, as relevant to your context, using the template provided for support.

**Remember:** a strategy is only as valuable as the extent to which it is put into practice. Having set the foundations, the next step is to turn this into action.

Good luck, and enjoy making a difference.

# Blank Impact Strategy Template

<b>Unit / Department</b>
<b>Scope of strategy</b>
<b>Mission or vision</b>
<b>Values</b>
<b>Approach</b>
<b>Roles and responsibilities</b>
<b>Strategic Goals</b>
<b>Measures of success</b>
<b>Related policies</b>