

The Impact Design Checklist for Customer Operations

A practical working tool for applying impact criteria without losing sight of operating fit

Use this checklist with the people responsible for sourcing, operations, procurement, workforce, legal/compliance, and program governance as appropriate. The Word version is editable; the companion PDF contains fillable fields.

Operating fit is the gate

Impact is an additional decision dimension. A provider or solution still has to satisfy the program's capability, quality, scale, economics, geography/language, technology/systems, resilience, and implementation-readiness requirements.

The four lenses

Lens	Working definition
Ownership	Who owns the provider. Use classifications only where they are accurate and supportable.
Location	Where the work is performed. Consider the economic context of the geography without assuming that location alone proves impact.
Employment	Who gets access to the work. Define the population precisely and verify the employment model rather than relying on broad claims.
Mission	Why the provider exists and which communities it seeks to serve. Mission or affiliation alone is not evidence of operating fit or impact.

How to use this tool

1. Complete the operating-fit gate before giving impact considerations decision weight.
2. Work through DEFINE, SOURCE, EVALUATE, SELECT & STRUCTURE, and MEASURE in order.
3. Check an item only when the team has a supportable answer or agreed action. Use the notes fields to record decisions, evidence, owners, and unresolved questions.
4. Treat certifications, classifications, missions, geography, and employment claims as facts to validate - not assumptions.

DEFINE

Translate intent into definitions, evidence rules, decision weight, and operating constraints.

Done	ID	Checklist item
☐	D1	The customer/program impact objective is written in specific, decision-relevant language.
☐	D2	The applicable lens or lenses - Ownership, Location, Employment, Mission - are identified.
☐	D3	Each selected lens has an agreed definition and evidence expectation.
☐	D4	Non-negotiable operating requirements are documented before impact weighting is discussed.
☐	D5	The team has decided whether impact is a threshold, scored factor, tie-breaker, portfolio constraint, or reporting objective.
☐	D6	Public-sector, certification, supplier-diversity, or legal requirements are being validated separately where applicable.

DEFINE decision notes / evidence / owners / open issues

SOURCE

Broaden the search while keeping evidence requests proportionate and operating fit intact.

Done	ID	Checklist item
☐	S1	The search is broad enough to find capable providers with relevant impact characteristics.
☐	S2	Providers are asked for evidence appropriate to the claimed characteristic rather than broad self-description alone.
☐	S3	The team avoids treating geography, ownership, mission, or affiliation as automatic proof of impact.
☐	S4	Any sensitive provider or workforce information requested is limited to what the decision actually requires.
☐	S5	Operating capability requirements remain visible during sourcing and are not relaxed merely to create impact eligibility.

SOURCE decision notes / evidence / owners / open issues

EVALUATE

Keep impact visible beside the operating and commercial criteria so the team can see real tradeoffs.

Done	ID	Checklist item
☐	E1	Impact criteria are scored or assessed separately enough that tradeoffs remain visible.
☐	E2	Capability, quality, scale/capacity, economics, geography/language, technology, resilience, and implementation fit are evaluated explicitly.
☐	E3	Impact evidence has been validated to the level required by the decision.
☐	E4	The evaluation avoids unsupported causal claims about customer, workforce, community, or economic outcomes.
☐	E5	Public-sector or supplier-diversity implications are reviewed against the applicable program rules rather than assumed.

EVALUATE decision notes / evidence / owners / open issues

SELECT & STRUCTURE

Document what was actually selected, what is committed, and how it will be governed.

Done	ID	Checklist item
☐	SS1	The selected provider or provider mix fits the complete operating and commercial need.
☐	SS2	Impact commitments included in the decision are written clearly enough to govern after award.
☐	SS3	Contract/SOW language distinguishes verified provider characteristics from desired future outcomes.
☐	SS4	Governance owners, escalation paths, and review cadence are assigned for any impact commitments.
☐	SS5	The decision record states the role impact actually played in selection.
☐	SS6	Any unresolved evidence or eligibility questions are assigned an owner and due date.

SELECT & STRUCTURE decision notes / evidence / owners / open issues

MEASURE

Measure only what can be defined and supported; distinguish participation from outcomes.

Done	ID	Checklist item
☐	M1	Each impact indicator has a clear definition, data source, owner, and reporting cadence.
☐	M2	The program measures only indicators the underlying data can support reliably.
☐	M3	The team distinguishes activity or participation measures from outcomes and does not overstate causality.
☐	M4	Provider/workforce data handling reflects appropriate privacy, contractual, and permission boundaries.
☐	M5	Reporting language avoids implying certification, statutory credit, customer outcomes, or community outcomes that have not been established.
☐	M6	The team has defined what decision or action the measurement is supposed to inform.

MEASURE decision notes / evidence / owners / open issues

Final decision record

**Program / sourcing
event:**

Decision owner:

**Selected impact
lens(es):**

**Operating-fit
conclusion:**

**Impact role in
decision:**

**Evidence still
outstanding:**

Measures agreed:

Next review date:

Use this record carefully

This checklist does not establish legal eligibility, certification status, statutory credit, or outcomes. Validate applicable requirements and evidence separately.