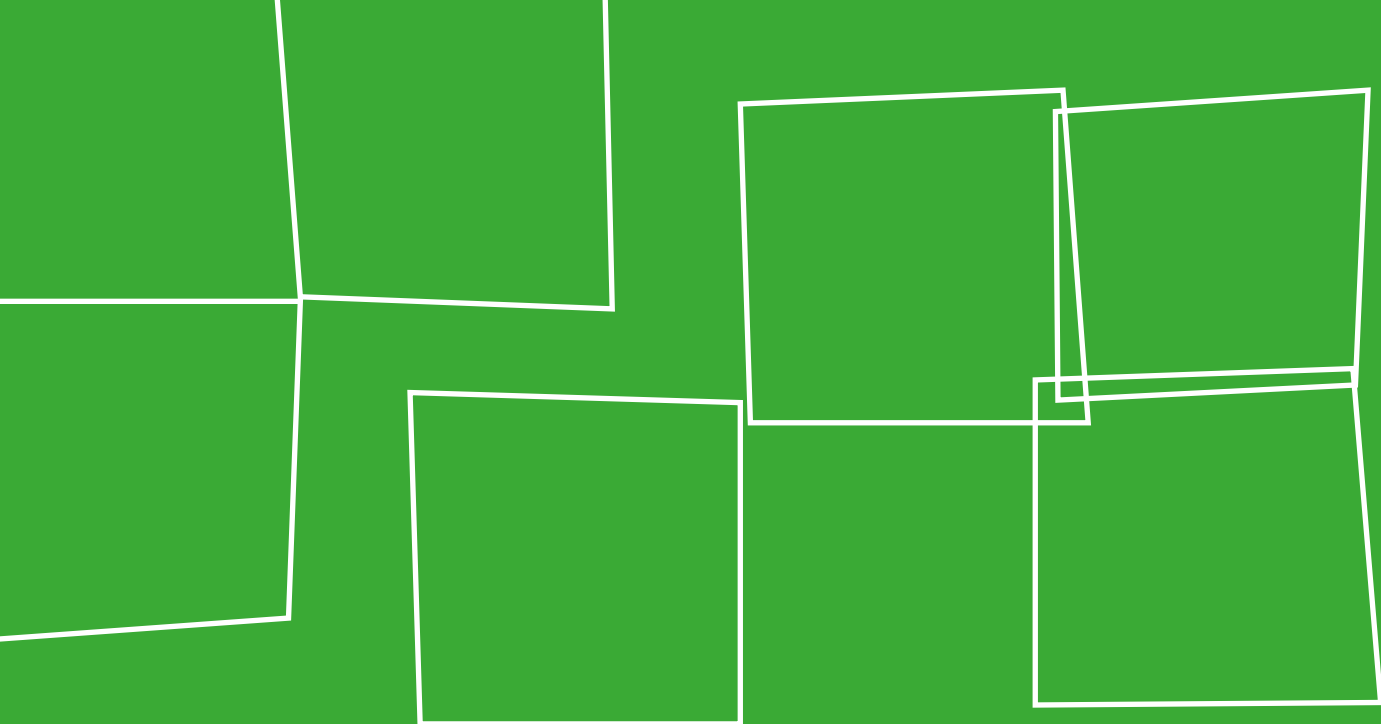


# knowing and showing your outcomes and impacts

a resource guide for community and voluntary organisations



The solid foundations series



## Preface

As community, voluntary and charity organisations we work to bring about positive change in the lives of the people and communities we serve. Everything we do should be aimed at improving people's lives and bringing about positive change for communities.

But how do we know we are really doing the best we can? How do we know that the activities, services and supports that we provide deliver the best possible outcomes for the people and communities we serve? Even if we are clear that what we are doing is what our communities require, how do we know if we are working as effectively as we can? Why does any of this matter?

We are living in a world where public resources are becoming scarcer and scarcer and where it is more important than ever that we can justify (to ourselves and others) that we are putting scarce resources to the best possible use.

There are three very good reasons why we should focus on the impact of their work. Firstly, being clear about our intended impact allows us to stay focused on the priorities of the communities we serve. Secondly, it enables us to come to conclusions about the effectiveness of our operations in delivering these priorities for communities. Finally, It allows us to tell the story of our work – the difference that our work has made in the lives of those we serve – to citizens and to key stakeholders such as members, supporters, service users, communities of interest, public and private sector partners, and funders.

This, the fifth guide in our Solid Foundations series, has been developed to help community, voluntary and charity organisations to develop an outcomes-focused and impact-led approach by:

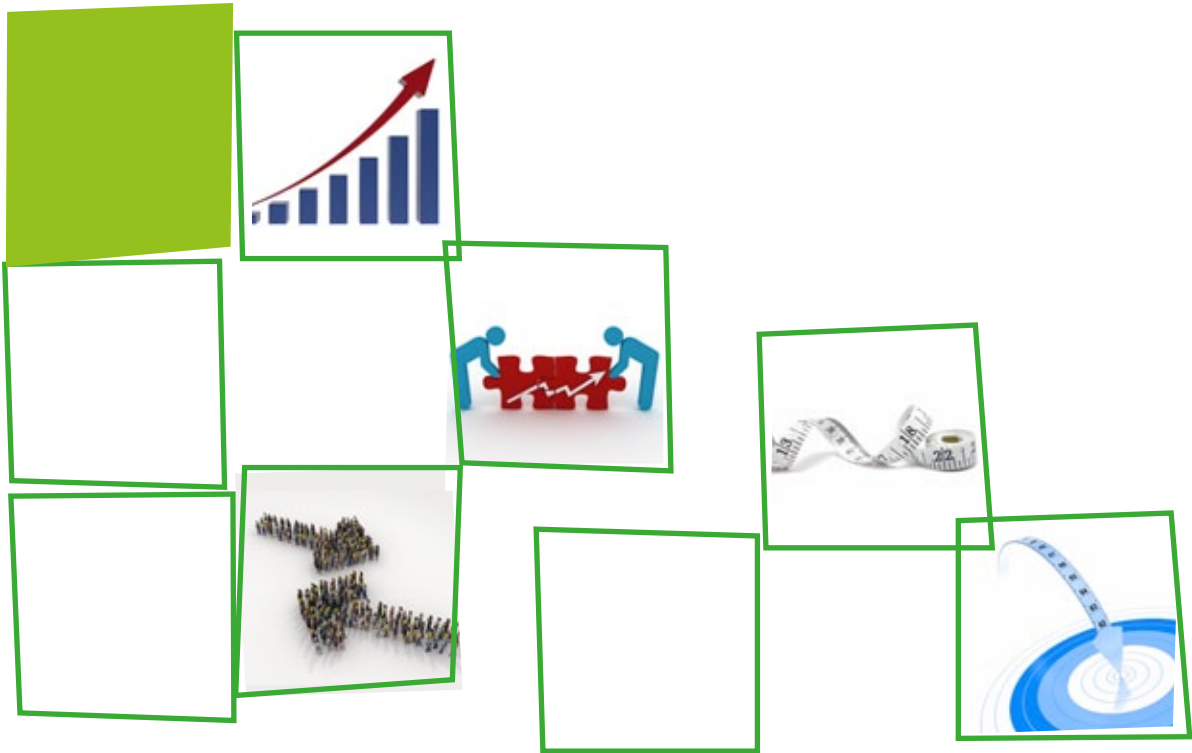
- Explaining the key concepts and benefits of the outcomes-focused and impact-led approach
- Introducing sample indicators and impact assessment tools
- Highlighting a number of relevant case studies
- Signposting to further information and resources

We hope you find this guide useful. If you have any additional information for future editions or any comments or questions whatsoever, please do not hesitate to contact us.



**Deirdre Garvey**

Chief Executive Officer, The Wheel



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The Wheel is a national support and representative body for community, voluntary and charity organisations across Ireland. It provides a wide range of information and support services, training and advice to individuals and organisations involved in community and voluntary activity. The Wheel also represents the shared interests of its members and the wider community and voluntary sector to government and other decision-makers.

### Disclaimer

Our goal is to provide comprehensive, timely and accurate information. This publication contains references and pointers to information kept or provided by other organisations. We therefore cannot guarantee their accuracy. It is our policy to correct any errors brought to our attention. Comments and suggestions are always welcome. Note that this document is not a replacement for seeking legal advice should that be necessary.

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## How to use this guide

Any community, voluntary or charity organisation can use this guide, regardless of age, size, geographic remit or area of focus. Its principles are also readily transferable to social enterprises. It may also be of interest to those who work with any such organisations, including statutory and philanthropic funders, investors, private companies practising corporate social responsibility and consultants/advisors. Although the guide focuses on the Irish experience, its content may also be applicable in an international context.

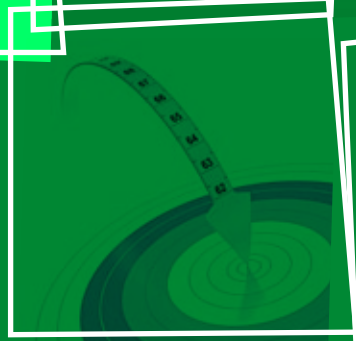
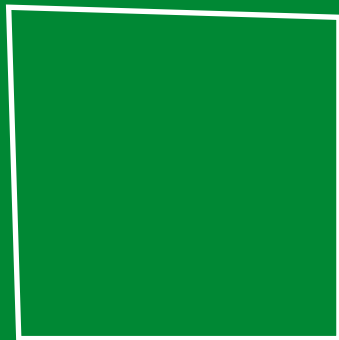
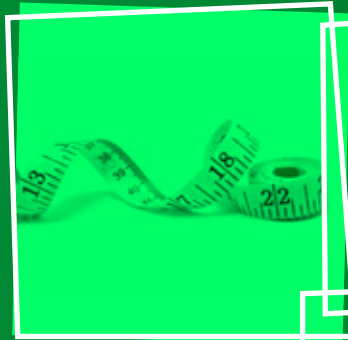
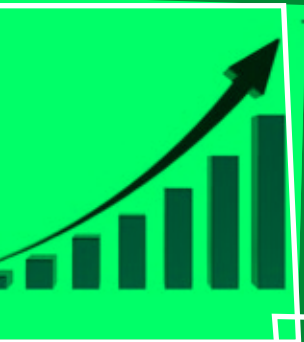
If you are new to outcomes-focused thinking, we suggest you read each of the chapters in turn. If you have some knowledge of outcomes-focused working and wish to learn more about a particular aspect, such as collecting outcomes data or choosing measurement tools, you can simply read the relevant sections.

Whatever your level of experience, you will probably be interested to read the five case studies of Irish organisations that have adopted an outcomes approach to their work. Finally, detailed contents pages, 'top tips', a checklist, signposts to further resources and an explanatory glossary of terms are provided for your convenience.



# CHAPTER 1: The basics

1



## 1.1 Introduction

Each and every day, organisations in the community and voluntary sector – and those who support them – make a difference. They make a difference to individuals, families, communities, entire countries, even the planet as a whole. But ‘just knowing’ that you are probably making some kind of difference is not enough; you also need to know what difference you are making, how substantial it is and how it happens. You must be satisfied that the change that you are bringing about is what is truly needed by the people or cause that you are serving. You also have a duty to ensure that you are operating as effectively and efficiently as possible when working towards achieving your goals. Finally, you must show the results of your work to those who have an interest.

### \*\*\* TOP TIP \*\*\*

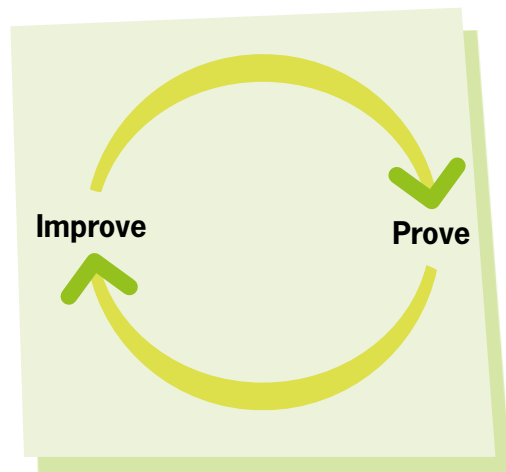
You may be very busy. But to what end? Practise saying, in a sentence or two, why your organisation does the work it does and what change it is bringing about.

## 1.2 Improve and prove

One way of approaching the topic of outcomes and impacts is to consider the easily understood concepts of improving and proving.

You should always seek to improve; to be engaged in a continuous process of learning and development that focuses on delivering positive change. Improving is also about actively pursuing ways to get better at what you do, whether this is how you conduct meetings, how you deliver services, how you communicate with people, or some other aspect of your work.

You should also prove (or at least have credible evidence which helps to demonstrate) that you are truly working towards your stated goals, that you are doing so according to acceptable standards and that positive change is indeed taking place. You should be able to explain these effects to a wide range of people who have a stake in what happens, both inside your organisation and externally.



## 1.3 The reasons for doing it

### 1.3.1 To make good decisions

You have a vision of what a better world would look like. The role your organisation plays in achieving this vision is your mission. You may or may not yet have clearly articulated these, but it is vital that you understand the link between your activities and the change you seek to bring about. Clarifying what you do and knowing what effect this is having on the wider world can help you to make better decisions, in terms of choosing appropriate tasks and allocating limited resources.

### 1.3.2 To keep you on track

To ensure that the time, energy and money that you invest in your activities is well spent, it is imperative that you always keep connected to the people that your organisation affects. When you involve those who your organisation serves, or works in partnership with, in planning and evaluating, they can help you to gather data for informed decision-making and thereby contribute towards achieving your goals. In particular, service users can assist you to ensure that you are developing solutions that satisfy their needs. Similarly, partner organisations can help you to make sure that you direct your activities well, within the context of other issues and available services.

### 1.3.3 To be accountable

Organisations have a responsibility to the communities they serve and influence, as well as to those individuals and organisations who resource their activities. Communication and transparency are important elements in building a relationship of mutual trust and understanding. It is essential that you communicate your progress clearly and honestly to the people who have placed trust in your organisation. Reporting on areas where you are succeeding, as well as on areas for improvement and how these will be addressed, keeps your stakeholders informed and allows them to feel part of the process of change.

### 1.3.4 To enhance your reputation

By identifying the impacts your organisation has, you will be able to more clearly and persuasively tell your story to a range of different audiences. Your primary focus should be on the change you bring about, but it is important that you do not underestimate your organisation's full value (see section 2.5.3). If you can get these messages across effectively, it will help you to stand out from the crowd.

### 1.3.5 To secure funding

To start, maintain and grow an organisation, you need to show funders that you have solid strategies that encapsulate where you want to go and how you will get there. Clarifying goals, setting targets and measuring success will help you to develop effective plans and funding proposals. It is important that such plans address both the sustainability of the organisation and how it achieves social benefit. Persuade funders that they are not giving to charity; they are instead investing in social impact.

## 1.4 Before you start

There are a number of key areas that you may wish to think about when you are considering an outcomes approach for your organisation.

### 1.4.1 Take ownership

What your organisation proves to others, and how it improves, are key decisions that ought to take into account the full range of stakeholders. Too often, however, a single group of stakeholders determines what is important and therefore, what is valued, done and measured. This is particularly true for organisations that have entered into service level agreements with statutory agencies. It is vital that you determine your organisation's own priorities.

### 1.4.2 Decide what you need most

Does your organisation have adequate structures, systems, processes and products in place, or do these require radical overhaul? If the latter is the case, you may wish to focus in the first instance on enhancing quality within your organisation. This involves, amongst other things: defining what 'quality' means for your organisation, deciding which aspects are in particular need of improvement (possibly all), and choosing whether you will seek external validation of quality. See section 4.2 for more details.

If you are reasonably satisfied with how your organisation is run, but feel that what is missing is an emphasis on the difference that you make, then you should focus first on understanding and finding evidence of outcomes and impacts. You probably already keep track of outputs, such as client numbers or media coverage, but these are only part of the picture. It is vital that you know more about what things would be like if your organisation did not exist, if your activities are having the effect you intended, and if you are truly addressing the social, economic or environmental needs that have been identified.

### **1.4.3 Maximise on opportunities**

Beginning this process as a stand-alone activity can seem like a daunting undertaking. However, there are several points in your organisation's lifecycle that can offer windows of opportunity to marry the need for change with a new way of thinking. These include startup, expansion, new leadership, strategic review and planning, changes in income, etc. Alternatively, one or more individuals may simply have a strong desire to adopt a new approach to the way your organisation does its work. If so, they will need to ensure there is sufficient commitment and energy within the organisation to move the process forward and see it through.

### **1.4.4 Optimise on resources**

As with anything your organisation does, becoming outcomes-focused and impact-led uses resources, such as time, materials, support, etc. It also requires somebody to take responsibility for driving the initiative in the short-term and ensuring that a focus on outcomes and impacts is embedded in the long-term. Resources are nearly always scarce, but this does not mean that you cannot begin the process. Indeed, starting small and building upon that foundation is a good way to develop skills, build confidence and strengthen teamwork.

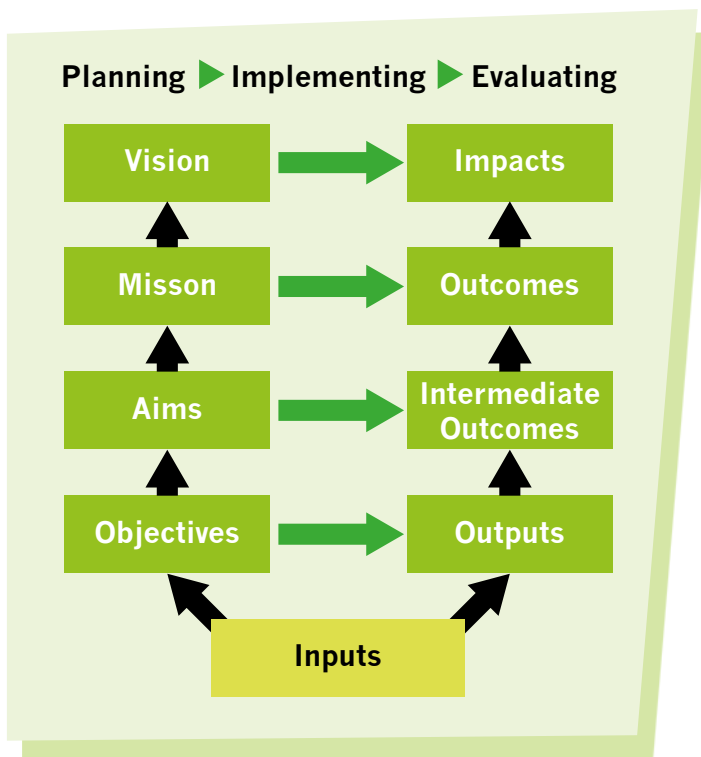
### **1.4.5 Choose your methods carefully**

There are many resources that can help your organisation to plan, monitor and evaluate its processes, outcomes, impacts and social value. Each of these meets one or more needs. It is important to align your organisation's needs with resources that can help you achieve those needs. Further information on choosing tools can be found in chapter 4.

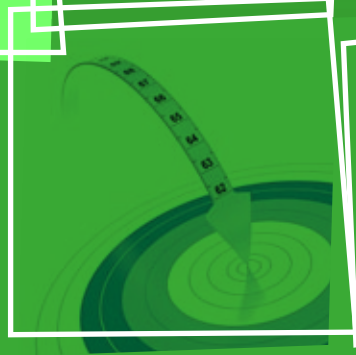
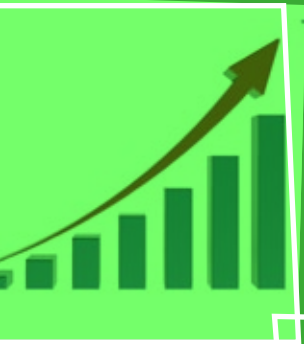
## 1.5 Understanding the concepts and the language

This field is, unfortunately, littered with jargon. Worse still, there is no absolute agreement on definitions! The terms as used in this guide are defined in the glossary. It is most important to distinguish between a) what you plan for and do and b) the results and changes arising from these actions.

The following diagram sheds some light on the links between planning and evaluating what you do:



# CHAPTER 2: The process



## 2.1 Introduction

This chapter looks at the various stages of adopting an outcomes-focused and impact-led approach. This involves thinking, planning, implementing, evaluating, communicating and learning on an ongoing basis. This is not new work; it is what your organisation does all the time, whether formally or informally. You already respond to different sources of information and feedback and make choices on the basis of these. Becoming more explicit and strategic about this, especially in terms of the outcomes that your organisation helps to bring about, will simply help you to get better. Changing the culture of an organisation to embrace constant improvement and measuring results takes time and requires leadership and commitment at all organisational levels. Maximising your outcomes and impacts is not an activity that you do once and then forget about; it is a continuous process, in which one cycle of work feeds into the next.

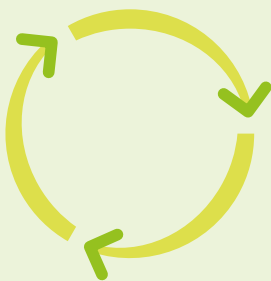
## 2.2 Think

The very fact that you are reading this guide means that you are already thinking about how to improve and prove what your organisation does. It is highly worthwhile devoting a few hours to going back to basics and thinking about the very reason you exist, what your role is, what you value and who your stakeholders are. It is essential that committee/board members are involved in this process, as well as senior staff (if you have any employees), but it can also be really helpful to get the points of view of other staff members, volunteers and, significantly, users of your service. Some organisations find it useful to have this process independently facilitated.

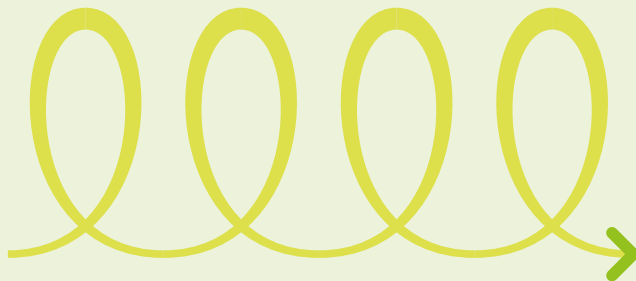
### \*\*\* TOP TIP \*\*\*

Think about outcomes and impact every day and in all that you do.

### Cyclical



### Iterative





### 2.2.1 Your vision

- Why was your organisation set up initially?
- What social or environmental need was identified, and is that need still the same?
- Is there a shared vision of what the world would look like if this need was addressed?

If yours is a relatively new venture, these questions should be particularly easy to answer. It is worth revisiting your vision statement if you have one, or spending some time drawing one up. Remember that you are imagining and envisioning a future for the client or cause, not for your organisation.

### 2.2.2 Your mission

The next step is to ensure there is an agreed mission for the organisation itself. In other words, what can your organisation do to achieve your vision? This is about understanding what outcomes and impacts you wish to create, where you are headed, and how – broadly – you might get from A to B. Revisit your mission statement or draw one up, which clearly answers these questions:

- What do you want to change?
- For whom?
- In what geographical area?
- What is your (one line) strategy for creating this change?

### 2.2.3 Your values

Your organisation's principal role should be to work towards positive outcomes. The manner in which you do so should not be ignored, however. It is important that you act in a way that is consistent with the values that you hold. All organisations have a set of values, but many have not written down what these values are. It can be a really useful exercise to define meaningful values that are shared across the organisation. Examples of values include: consulting your clients when making decisions that affect them; involving volunteers in a meaningful way at all levels of your organisation; or behaving in an environmentally responsible manner. It is recommended that you explicitly state that your organisation embraces change and that it will adapt as necessary to changed circumstances and new evidence.

#### \*\*\* TOP TIP \*\*\*

Vision, mission and value statements should be short and well-crafted.

### 2.2.4 Your stakeholders

The people that affect or are affected by your organisation are its stakeholders, and they have a legitimate interest in what you do. Knowing who they are will help you to:

- Understand the effects of your activities on them.
- Identify and then respond to any issues or concerns they raise.
- Decide to what extent you will actively involve them in your activities.

There are many ways of identifying and classifying your stakeholders. A brainstorm can be a particularly effective technique in the first instance. Afterwards, you might use various lists, charts or maps to group similar stakeholders. For example, your stakeholders might include beneficiaries (members, service users, their families and friends), investors (funders, donors), workers (volunteers, paid staff, contractors), influencers (politicians, media), collaborators (organisations doing related work in the community, sister organisations) and others. Some stakeholders are of more importance than others; these are usually called 'key stakeholders' or 'primary stakeholders', with 'secondary stakeholders' being of less direct significance to your organisation.

## 2.3 Plan

### 2.3.1 Outcomes-based strategic planning

Once you have clarity about your vision, mission, values and stakeholders, you need to make a plan. When planning, many people start with the funding they have at their disposal, or with the services they are already delivering, but this is arguably the wrong way round. Instead, it can be very productive to work backwards, starting with the vision and mission and seeing what you need to do to along the way to ensure that the positive change you want to bring about actually takes place. Yes, this means addressing aims, objectives, resources, risks and targets, but it also means being explicit about how these are linked to your activities and the results of your work (see the diagram in section 1.5). The key difference between this form of strategic planning and the type of strategic planning that many organisations have done until now, is that it is outcomes-based, and focuses directly on the organisation's client group or cause, as opposed to being too preoccupied with the organisation itself. Another direct benefit is that it provides a clear framework for monitoring and evaluation.

### 2.3.2 Developing a roadmap

There are different ways of planning for outcomes, but whichever you choose, you need to have some understanding of how change happens. You need to be able to show how what you do (your outputs) is linked to what changes as a result (your outcomes), and what assumptions you are making when you are suggesting these links. You can then illustrate a journey of change onto a 'roadmap'.

The process for doing this does not need to be complicated, especially if your organisation is small and local, in which case a piece of plain paper and some clear thinking may suffice. Even if your organisation is larger and more complex, and therefore needs more detailed plans, you may have the skills and knowledge to do this in-house. If not, you may choose to bring in external expertise, which can be particularly effective in terms of challenging your assumptions. You could engage in a formal 'theory of change' process and/or you can develop a 'logic model', which represents (usually graphically) how an organisation's inputs, activities, outputs, outcomes and impacts are interlinked. Other terms used to describe models such as these are 'impact maps' or 'strategy maps'.

To illustrate this very simplistically, consider an organisation that offers sexual health training for teenagers:

Its **inputs** include its funding, premises, equipment and volunteers.



Its **activities** include planning, publicising, coordinating and delivering training courses.



Its **outputs** include the number of people who attended the courses and the number of certificates achieved.



Its **outcomes** include individuals who are more aware of the joys and risks of sexual activity.



Its **impacts** include a contribution to a rate reduction in teenage pregnancy and sexually transmitted infections.

### \*\*\* TOP TIP \*\*\*

Consider using the theory of change approach. Theory of change is a powerful process that is both rigorous and participatory, in which organisations identify the conditions they believe have to unfold in order for their long-term goals to be met. Desired outcomes are arranged graphically in a causal framework. Hypotheses about what actions will bring about the outcomes can be tested against this framework. The theory of change is used as a foundation for strategic planning, as a tool for credible and relevant evaluation, as a means of instilling ownership of an initiative amongst stakeholders and to build organisational capacity.

### 2.3.3 Yet more planning

Planning does not stop here. It is important to plan for each of the stages that come next, namely: delivering outcomes; measuring success; communicating the scale of the impact you are having; as well as reviewing progress so that you learn what does and does not work, and thereby keep improving. This means putting in place work plans that address matters such as how you will resource your work, deliver high quality goods/services, and generally be a well-run organisation.

## 2.4 Deliver

### 2.4.1 Just do it!

If you have given sufficient thought to outcomes and impacts and have put in place appropriate plans, implementation should be easier than previously, because you should be in a position to be more targeted in your approach, only doing activities that generate positive change. However good your plans, circumstances will inevitably change from time to time, so adapt plans as necessary, but never lose sight of the bigger picture.

It is unlikely that everyone in your organisation will automatically understand the new approach. If this way of working is very different from what you have been used to, you will have to convince skeptics of its value. Staff and volunteers at all levels must be persuaded that being outcomes-focused and impact-led is important and that it is about tackling the very real societal needs that your organisation was set up to address. This may take some time, but it is vital that everybody is on board in the long-run.

### \*\*\* TOP TIP \*\*\*

If it is difficult to persuade some people in your organisation that social impact analysis and reporting are important, remind them that you already do financial analysis and reporting and these are most definitely not the reason your organisation was set up!

### 2.4.2 Quality matters

Remember that prioritising the end-result of your actions does not mean that you can forget about quality along the way; indeed impact and quality go hand in hand. It is crucial that you have structures, systems, policies and processes in place that ensure your organisation has good governance, management and operations. In this regard, you may wish to consult resources such as:

- The Wheel's Solid Foundations series of good practice guides for community and voluntary organisations (of which this is one)
- The Governance Code for community and voluntary organisations
- The Guiding Principles for Fundraising

## 2.5 Assess

### 2.5.1 Moving towards measurement

Measurement is important, but you cannot and should not measure everything. The majority of time and other resources should be spent on delivering positive change, not on assessing whether you have done so. You do, however, need to be able to have answers to each of these questions:

- Did we have the right level of resources (**inputs**) to do what we set out to do?
- Did we do what we said we would do (**activities**)?

- Did these activities create the immediate results (**outputs**) we intended?
- Are these activities leading towards medium and longer-term changes (**outcomes**)?
- Are there indications that these outcomes are leading to broader and more sustained change (**impacts**)?

You are probably already able to answer the first, second and possibly the third questions, but may be struggling with answers to the outcomes and impacts questions. You should not stop gathering information on inputs, activities and outputs, but you should also try to find ways of measuring change.

#### \*\*\* TOP TIP \*\*\*

You may also want to ask yourself: 'are we using the right processes to do our work?' and 'are we adhering to our values?'

### 2.5.2 How do we know?

'How do we know?' is a simple way of asking what evidence there is to show that the changes you expected to occur are happening in reality. Invariably, you will need to follow this question up with another: 'What happened for you?'. In other words, when trying to find evidence of change, you will need to ask your stakeholders if and how they experienced change. By asking these two questions, you can find out whether the assumptions you have been making about cause and effect are valid.

You will need to develop a manageable system that will help you to know if you are on the right track. Remember that you are seeking believable evidence, not necessarily scientific ‘proof’. Anecdotes are not sufficient. You need to describe what methods you will use for acquiring the relevant information. Some of this information you will gather and interpret on an ongoing basis; this is called ‘monitoring’. Other information you will delve for more deeply at periodic intervals (for example, once a year); this is called ‘evaluating’.

Once you have collected all your information, it will need to be analysed. This process can be simple or more involved, can be performed by one person or a team, and can be done internally or with external support. It should enable you to draw conclusions and provide a springboard for further discussions about how your organisation can improve what it is doing.

### \*\*\* TOP TIP \*\*\*

Remember: not all change is positive and intended; it can also be negative and/or unintended!

### 2.5.3 Do not underestimate the full value of your work

Although your focus should always be on the end goal, it is important that you do not undersell the full value of your contribution along the way. Socio-economic and environmental problems are big and not easily solved. Every step along the way towards finding solutions should be recognised, both at the organisational level, but also at the level of each of your service users. It is therefore important to explicitly consider intermediate outcomes that are the stepping-stones to ultimate outcomes. The term ‘distance travelled’ is often used in this regard.

Furthermore, organisations in the community and voluntary sector operate in ways that create many additional benefits for beneficiaries and others, which are sometimes hidden. There are a number of examples that illustrate this.

The involvement of unpaid volunteers provides a significant value to those individuals, service users, the organisations that they work with and society as a whole. The nature of the community development process is to involve and empower people within local communities; this is deemed to be as important as any other results arising from community development initiatives. Sports and arts organisations offer experiences that are often difficult to quantify, yet these experiences are at the very heart of their ‘worth’. Although

it may not be immediately obvious how to do it, there are ways in which less tangible benefits like these can be captured and it is important that you try to do this. There are different techniques that you can use (see chapters 3 and 4) and different resources that you can avail of (see signposts).

## 2.6 Communicate

### 2.6.1 Communicate, communicate

You have a responsibility to keep your stakeholders 'in the loop'. It is vital, therefore, that you communicate your results to both internal and external stakeholders. Doing so internally will boost morale, aid learning, and enable further improvements to take place. Doing so externally is usually part of your funding requirements, but it will also increase your credibility, allow you to attract further support, and facilitate the sharing of lessons learnt with others. Although your organisation does not need to agree with or comply with all concerns raised by stakeholders, it is good practice to provide them with adequate, consistent and coherent responses. It is also really important that you are honest both about your successes and areas where you have not (yet?) had the desired results. Further information about reporting impact to the governing body of your organisation can be found in section 3.7.

### 2.6.2 Impact-centricity!

There are many different ways of communicating what your organisation is about, from conversations with people and formal meetings, to written materials and videos, with much in between. Try to be as 'impact-centric' as you can when talking about your organisation. So, instead of always talking about the services that you offer, say what changes you have brought about for your beneficiaries or how your cause is progressing. Both quantitative and qualitative data matter, so try to use a combination of numbers, stories and images when you are 'selling' your impact. Remember to include impact information:

- in your strapline
- on your website
- on social media
- in your annual report
- in funding bids
- in press releases
- in all other publicity materials

#### \*\*\* TOP TIP \*\*\*

One size does not fit all when it comes to communicating outcomes and impacts; you will have to tailor your message and method according to your intended audience.

## 2.7 Enhance

### 2.7.1 Constant improvement

By implementing changes based on your learnings, you will get even better at what you do. Use monitoring information to make ongoing refinements and use evaluation information to develop new plans and to reallocate resources.

From time to time, you will need to ask yourselves: 'Are we doing the right thing at all?'. It is important that you do not ignore evidence that you now have at your disposal. Many people in organisations are very resistant to change, both in terms of altering what is done and how it is done. However, by stopping doing something that has been shown not to work, it means that resources can be released and devoted to new interventions that, hopefully, will work.

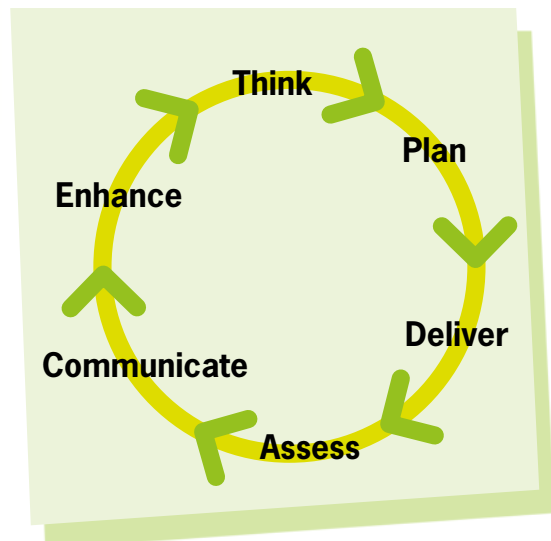
#### \*\*\* TOP TIP \*\*\*

Let go of activities that cannot be shown to drive change.

### 2.7.2 Appropriate collaboration

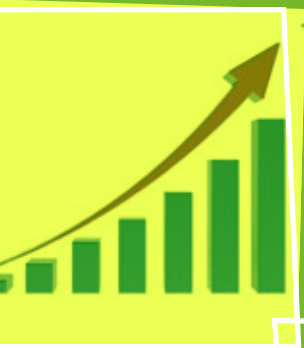
Finally, it is worth remembering that most problems that organisations in the community and voluntary sector are addressing are too big to be solved by them on their own. There are many organisations working towards similar goals, and in order to have true impact, there is an onus of responsibility on them to collaborate (where this can be shown to be of benefit to their client groups). Provided that the various partners share certain core values, this will almost certainly optimise on limited resources and lead to better outcomes. When considering collaborative efforts, do not limit yourself to other not-for-profit organisations. There may also be scope for you to work with for-profits, central and local government, academics, etc.

In summary, the process comprises the following stages:





# CHAPTER 3: Tracking progress



## 3.1 Introduction

When you are undertaking an activity delivering a service or providing goods, with the intention of having a particular effect (whether on individuals, a community, a local economy, the environment or something else), you need to show that you are indeed having the desired effect. This chapter shows you how to assess whether you are truly making a difference.

You therefore need to know what success looks like. You need to develop agreed indicators that will help you to know whether your anticipated change is taking place. You can then decide what specific information you need, and how you will go about gathering it.

It is essential that you ask all your stakeholders questions about the changes that have occurred and how they happened. You also need to remember that your organisation's effects may be broader than those you initially set out to create. Such side effects can be positive or negative. It is important that you are open to finding out about such effects from the start and that you make provisions for incorporating them into your strategies.

### \*\*\* TOP TIP \*\*\*

If frontline staff members or volunteers say 'we just know that we are making a difference', explain that this in itself is not enough. Help them to articulate the changes that they are witnessing.

## 3.2 Indicators

### 3.2.1 What is an indicator?

An indicator is some sort of signal, symptom or hint suggesting something else. Therefore, indicators are your way of knowing and showing that you have done what you set out to do and that change has happened. For any outcomes that your organisation has, there is a range of possible indicators that can be observed, detected or measured with varying degrees of certainty. Indicators can be quantitative (numerical) or qualitative (descriptive), or often a mix of the two.

### 3.2.2 What are objective and subjective outcome indicators?

Indicators can help you to assess both objective and more subjective outcomes. An example of an objective (sometimes called 'hard') outcome indicator is how many unemployed people found employment after taking part in a jobs training programme. An example of a subjective (sometimes called 'soft') outcome indicator is the extent to which trainees' self-confidence rose as a result of being on the jobs training programme.

Although it is usually easier to measure objective data, it is certainly possible, and necessary, to capture subjective data, such as changes in feelings, attitudes and behaviour over time. It is therefore recommended that you use both objective and subjective indicators.

Objective and subjective indicators often complement each other, but this is not always the case. It is important to appreciate that single indicators do not tell the full story. For example, an objective indicator might show that crime levels in a neighbourhood have dropped, but a subjective indicator might also show that people's fear of crime in the locality has not gone down.

### 3.2.3 What makes a good indicator?

Choose your indicators wisely, by ensuring that they are sufficiently challenging but also being realistic about what it is possible to measure within resource constraints. Four helpful criteria for choosing suitable indicators can be summarised by the acronym AIMS:

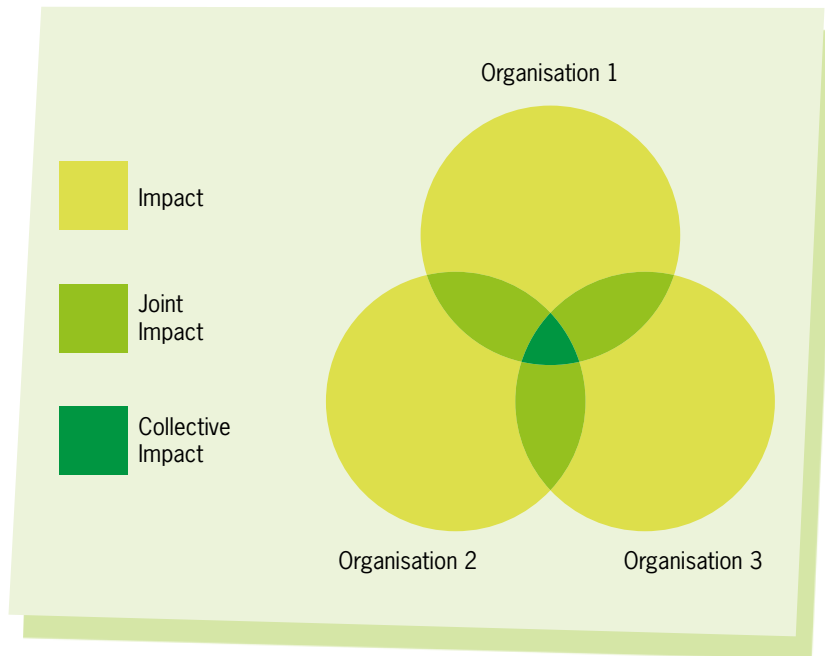
- **Action-focused** – will knowing about this help you to do things better and is it within your powers to influence it?
- **Important** – is it a priority for your key stakeholders and therefore relevant to your organisation?
- **Measurable** – does it provide you with information that truly tells you something about the effects you have had?
- **Simple** – is it straightforward enough to be understood by those who are using it and is it easy enough to get the information without expert assistance (if none is available)?

### \*\*\* TOP TIP \*\*\*

Always try to use more than one, and ideally more than two, indicators of change. In this way, you can be more confident that your results are valid. However, keep the total number of indicators manageable.

### 3.2.4 Learn from others

Although each socially-driven organisation is unique, many share similar goals and may therefore use similar indicators to show that they are effecting change. Sample indicators for certain outcomes are described in the following sections. There are a number of indicator banks in existence that provide listings of common outcomes that can help you when you are developing your own outcome indicators. Charities Evaluation Services in the UK has published a free report on such indicator banks. It may be fruitful too, to have conversations with organisations that do similar work. Additionally, by sharing the same or similar indicators, organisations working in the same subsector and/or same geographic area have the opportunity to learn if and how they are having a collective impact.



### 3.3 Sample indicators for outcomes for individuals

The following sample outcome indicators focus on benefits for individuals as a result of engaging with your services. However, these benefits will invariably have an influence on other stakeholders as well (for example, their families or other service providers). And because organisations always serve more than one client, the results that are measured for each individual can also be aggregated to highlight overall changes brought about by your organisation.

#### 3.3.1 Well-being

It can be argued that, alongside social justice and ecological sustainability, promoting people's well-being should be considered one of society's ultimate aims. Well-being refers to people's satisfaction with various aspects of their lives, their perception of their own personal development and their sense of

belonging to their community. Finding out about well-being means asking people to assess the quality of their lives, as well as asking them to reflect on their emotional experience of their lives. There is considerable evidence that expressing positive emotions leads to greater positive functioning. Expressing negative emotions can be healthy too. Psychologists believe that a good balance is typically in the range of three-parts positive emotions to one-part negative emotions. Questions about well-being can only be asked of the people concerned. These questions can be either open-ended and/or people can be asked to mark their responses on a scale. Examples of well-being indicators include:

- satisfaction with family relationships
- ability to be oneself with friends
- extent to which neighbours are known
- level of respect felt in school/work

### 3.3.2 Skills development

Many organisations seek to help people increase their skills in specific areas. These skills might be ‘hard’ skills such as learning how to drive or read, or ‘soft’ skills such as communicating with others and prioritising tasks. The effects of skills development might be increased likelihood of continuing formal education or improved self-esteem, for example. Skills increases can be observed and tested by others and/or can be measured by asking the individuals concerned. Examples of indicators of enhanced skills development include:

- ability to work in a team with other people
- taking care of personal hygiene and grooming
- problem-solving skills
- managing money

### 3.3.3 Improved health

Improved physical and/or mental health is the *raison d’être* for many organisations. There are different ways to measure changes in health. Some indicators are visible, some can be checked against existing records and some are only possible to be measured by people’s own responses. There are various standard scales that can be used to track progress in the area of health. Usually, a combination of indicators is best to get a holistic picture of a person’s health status. Examples of health indicators include:

- number of visits to doctor or hospital
- weight gained or lost
- experience of specific symptoms
- absence from work due to sickness

### 3.3.4 Reducing high-risk behaviour

Some organisations exist to assist people in changing patterns of behaviour that result in harm to themselves or others. Changing negative habits can be an extremely difficult and long process, so it is helpful to measure steps along the way (whilst recognising that there will setbacks from time to time). It may also be useful to combine indicators about high-risk behaviour with indicators about health, skills and well-being. Information should therefore be sought from the individuals concerned, but could also be sourced from other relevant stakeholders, such as their family, their friends, the staff and volunteers who work with them, and so on. Examples of indicators about high-risk behaviour include:

- amount of alcohol consumed
- extent to which prescribed drugs are supplemented with other drugs
- number of unsafe sexual encounters
- number of nights spent in prison or Garda custody

### 3.4 Sample indicators for broader outcomes

This section provides sample indicators for some of the types of benefits that organisations might bring about for communities (of place and of interest), wider society and the environment.

#### 3.4.1 Social capital

Social capital is a term that encompasses a range of elements, including civic engagement, neighbourliness, social networks, social supports and perceptions of local area. This makes it difficult to measure comprehensively. Organisations may in any case only be interested in a particular aspect of social capital. The following are examples of social capital indicators:

- the extent to which people feel they can influence decisions that affect their neighbourhood
- if they have a close relative living nearby
- if they have at least three people they could turn to if there is a serious personal crisis
- if they feel safe walking around after dark

#### 3.4.2 Meeting community needs

Many organisations specialise in providing services where there is an identified gap, either because there is nothing available at all, or because it is not affordable to all people. Measuring initial demand for such services and then assessing increases in access to the services over time, can be a useful way of demonstrating the effects of initiatives set up to meet a community's needs. This can be done by looking at changes in waiting lists, people's experience of accessing services, their satisfaction with such services, and so on. Indicators in this instance might include things such as:

- access to pre-school educational provision
- use of health services
- uptake of welfare benefits
- tenant participation rates in housing association complexes

#### 3.4.3 Environmental quality

There exists a growing number of organisations whose focus is the preservation of the natural environment or the improvement of the built environment. Furthermore, it can be argued that all socially responsible organisations also have a duty to act in an environmentally responsible manner. Every individual, household and organisation affects the environment through energy consumption, water use, transport choices, waste, pollution, etc.

There are many ways in which harm can be minimised and positive effects can be maximised and these can be measured relatively easily. Examples of environmental indicators include:

- use of electricity from renewable resources
- number of work-related journeys undertaken on foot or by bicycle
- percentage of waste recycled
- numbers of planted trees that have successfully established

#### 3.4.4 Policy changes

Increasingly, organisations are no longer simply providing services to those in need, but are aiming to tackle the root causes of the underlying social problems. This requires shifting public perception about what are often complex issues and persuading law- and policy-makers of the need for change. Although change can be sudden, more often it takes a long time. In order not to feel disheartened and to establish what does and does not work, it is therefore useful to track progress of this type of advocacy work over time, remembering that progress in this field is rarely linear. Examples of policy change indicators include:

- how often the issue is discussed in the media (traditional and new media) and how it is framed
- ratings of policy-makers' interest in, and influence on, the issue

- public understanding of the issue as assessed by polls
- progress of a bill through the Oireachtas

### 3.5 Collecting the data

Once you have defined what you are going to research, what information you need and what your indicators are, it is time to start thinking about the best ways of collecting the data. There are many different ways of collecting such information, the main ones of which are explored below. Which metrics and methods you choose will depend on what information you are trying to gather and the time and other resources you have at your disposal. Each method has benefits and limitations.

If your stakeholder group is large, it may not be possible to get the views of everyone. In this case, you will have to select a 'sample' that is representative of the total group. Seek advice about how to do this without bias if you are not sure.

You are probably interested in demonstrating change over time. If so, it may be possible to establish a 'baseline' which shows what things like before the intervention took place and compare subsequent progress with that baseline. If you want to show the 'distance travelled' by service users, it is important that you ask them questions when they first access your organisation and periodically re-ask those questions afterwards.

It may also be possible to show the difference between those people or areas that received your intervention, and a 'control' group that did not. Although this is good practice, it can be resource-intensive and challenging in terms of logistics and ethics.

### 3.5.1 Existing records

There are often existing records that you can use when assessing progress. These can be internal to the organisation, or external. Internal records are a cheap and relatively easy way of gathering data and have the benefit of capturing information at the time when it happened. However, unless they were designed specifically for monitoring and evaluation purposes, they may not answer your questions exactly. There is also a danger that they are incomplete or inaccurate. There may also be publicly available data that you can make use of, gathered and analysed by others. These include academic literature, census data, attitudinal surveys undertaken by polling agencies, and so on. These are not specific to your organisation, but can be helpful for painting the backdrop to your intervention.

#### \*\*\* TOP TIP \*\*\*

Do not forget to protect individuals' confidentiality. Resolve any data protection concerns at the earliest stage possible.

### 3.5.2 Questionnaire surveys

Questionnaire surveys are a firm favourite for assessing an individual's knowledge, opinions, behaviour, etc. They can be anonymous or with named respondents. A paid or voluntary worker can administer the questionnaire, either face-to-face or over the telephone, or they can be self-administered. In the past, postal questionnaires were the norm, but on-line questionnaires are an increasingly popular option, as they are significantly cheaper.

It is not easy to design a good questionnaire and it is recommended that you seek advice in drawing one up, unless you already have good skills in this area. In any case, you should test the draft questionnaire with a handful of people before distributing it widely. Such testing is called 'piloting'. Questionnaire surveys tend to have low response rates; you may wish to consider offering appropriate incentives to increase participation in the survey.

### 3.5.3 One-to-one sessions

There are instances when it is more appropriate to explore issues in greater depth through one-to-one sessions. These are usually face-to-face, but can also be done over the telephone or through video-link. Regardless of the medium, it is important that the physical environment is comfortable and that there is no interruption. Scheduling and minimising bias can prove problematic. One-to-one sessions can be highly structured, but more often than not, they are semi-structured to examine complex and conceptual issues in greater detail.



The interviewer must listen actively to what the respondent is saying and must ensure there is a good record of the session, either by taking extensive notes and/or by recording the interview (but only if interviewees give their permission).

### 3.5.4 Group sessions

Sometimes, it is most efficient and effective to gather the views of groups of people, as opposed to the views of individuals. Some organisations use group interviews, in which everyone in the group is essentially asked the same questions, but there are more interesting ways in which group sessions can work. Focus groups use the interaction of a relatively small group (usually comprising six to ten participants) to provide rich data that would not have been possible to gather in one-to-one interviews. Another option is to use participatory learning and action, in which groups of beneficiaries interact, mainly using visual ways of expressing opinions and thoughts. A further option that is becoming increasingly popular is the World Café approach (a hosted session that is suitable for large group dialogue). It is essential that group sessions are run by facilitators who are skilled in the chosen approach and that one or more forms of recording are used (written notes and/or audio-recording and/or video-recording).

### \*\*\* TOP TIP \*\*\*

Keep these ideas in mind when asking questions: clarity, consistency, neutrality, precision, relevance and thoroughness. And do not forget to say thank you at the end.

### 3.5.5 Other methods

While the above methods can act as powerful data collection tools, they do not represent the full range of possibilities. You can also consider techniques such as structured observation, traditional and social media analytics, and video-diaries. Many organisations use case studies, which can offer compelling evidence and provide useful 'colour' to supplement statistics. It is important, however, that case studies are not used as the sole method and are not hand-picked and edited simply to cast your organisation in a good light!

### 3.6 Analysing the data

Whatever collection methods you have used, the data will have to be analysed. There are many sophisticated ways of analysing data, but unless you have the skills and resources to use these, it is probably best to keep it simple. Once you have gathered and organised all your 'raw' data, you can begin to look at the results in more detail and spot trends. You should be able to see:

- what you did and did not do
- how well it went
- what else happened
- whether your initial assumptions were correct
- which aspects of your work should be built upon
- which aspects of your work require change

If you want to take the analysis one stage further you can consider all or some of the following, by using controls, by asking stakeholders about other influences and trends, and by otherwise making informed estimates:

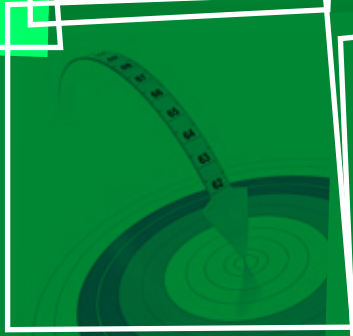
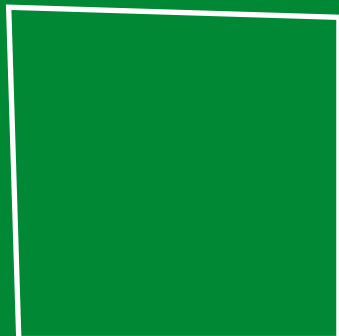
- How much of the change was down to your organisation? (this is called 'attribution').
- How much of the change would have happened anyway without your intervention? (this is called 'deadweight').

- To what extent did the change have a negative effect for other stakeholders? (this is called 'displacement').
- How long will the effects of the change last? (this is called 'drop-off').

### 3.7 Tracking progress and governance

Whether it is called the 'board' or 'committee' or something else, the governing body of your organisation is ultimately responsible for upholding your vision and assuring itself that the organisation is always working towards your mission. It follows therefore, that the tracking of progress on outcomes must somehow be built into the practice of your governing body. Your governing body should play an integral role in planning for outcomes. When doing so, its members should agree what information they need in order to know whether progress is occurring. Clearly, it is not appropriate to discuss detailed data sets at meetings where time is limited. Some organisations find it useful to use some form of 'dashboard' to provide an accessible and quick summary of agreed performance indicators at each meeting. Some even use a traffic light system to indicate good (green), adequate (amber) and poor (red) progress. It is usually helpful to devote one full meeting per year to taking a more in-depth look at what has been achieved.

# CHAPTER 4: The right tools for the job



## 4.1 Introduction

There are many different frameworks, systems, methods and tools for measuring outcomes, impacts and social value. This chapter does not offer an exhaustive catalogue; it merely provides a flavour of measurement, by introducing some approaches that you might consider (contact details for relevant organisations are given in the signposting section). Organisations often modify tools to fit existing practices and structures, and most use a combination of tools to meet their particular needs. Some tools are free-of-charge, whereas others have a cost associated with them. Regardless of whether there is a direct financial cost, you must recognise that all measurement requires a certain amount of resources.

### \*\*\* TOP TIP \*\*\*

Contact other organisations that have already used particular approaches or tools and ask them how they got on.

## 4.2 Quality tools

The importance of adopting good practice and of making ongoing improvements has been stressed throughout this guide – quality matters! This guide is more about outcomes-focused working than it is about quality assurance. Nonetheless, adopting a quality approach to your work can be beneficial and there are numerous systems and resources available to help you do this. These include:

- European Foundation for Quality Management's (EFQM) Excellence Framework
- National Standards Authority of Ireland's Excellence Through People programme
- International Organisation for Standardisation's (ISO) 9000 series
- Charities Evaluation Services' Practical Quality Assurance System for Small Organisations (PQASSO) system

Although these systems may mention outcomes, outcomes measurement is not their primary focus.

## 4.3 Strategic management tools

There are also systems that aim to combine everything that an organisation hopes to achieve and does into one strategic management tool. This makes a lot of sense, because working towards positive outcomes, and measuring them, is not a standalone activity. However, it can be argued that within these systems, there is still potential for most emphasis to be given to the workings of the organisation and for outcomes to be somewhat sidelined as a result.

Most of these strategic management tools originated in the world of business and have been adapted for use by charities and social enterprises. For example, the Balanced Scorecard approach is the foundation of Social Firms UK's Third Sector Performance Dashboard. Some, such as the Results Based Management approach developed in Canada and used by many international development organisations, are excellent but rather complex.

In Ireland, a system has been developed by Nexus Research called SPEAK, which stands for Strategic Planning Evaluation And Knowledge. It is a management support and evaluation system which offers organisations a set of tools that enable a deeper understanding of the relationship between planning and priorities, efforts and resources expended, and outputs, outcomes and impact and in the process proactively and continuously engaging with stakeholders. SPEAK results can be aggregated and compared across different organisations.

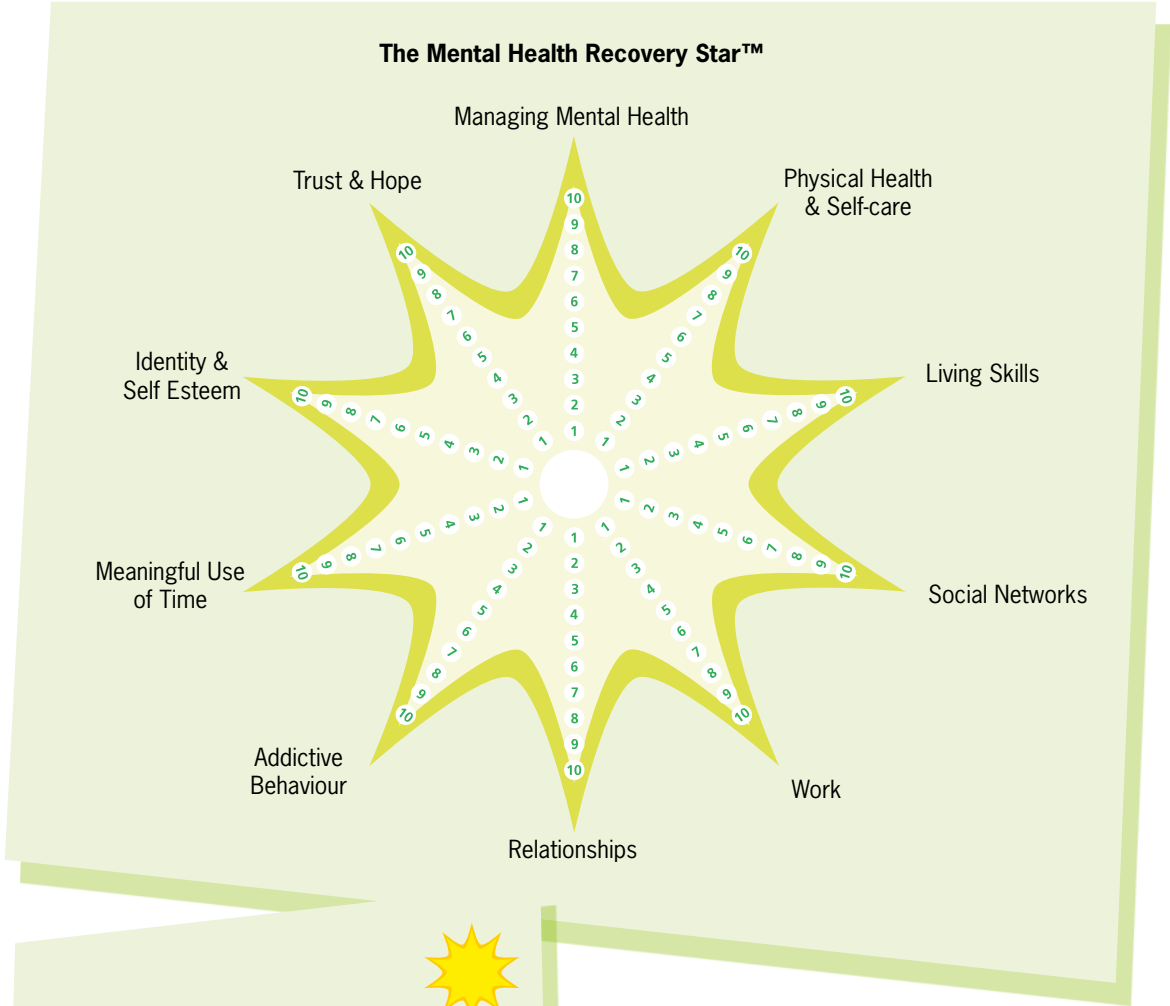
#### \*\*\* TOP TIP \*\*\*

Whichever tool you opt for, it is recommended that you underpin it with a well-thought out theory of change, or some other logical model that shows the relationship between your activities and the changes you bring about (see section 2.3.2).

## 4.4 Impact assessment tools

### 4.4.1 For measuring outcomes for individuals

There are a number of tools that are very useful for tracking change over time when working with individual clients. These use scales and/or grids to map changes in various aspects of clients' lives. The Outcomes Star, which was developed by Triangle Consulting in the UK, is one example. It is a suite of printed and online tools for supporting and measuring change when working with vulnerable people. Originally conceived for homeless services, there are now many different versions of the Outcomes Star for different client groups and services, from older persons and teens to mental health recovery and music therapy. The Outcomes Star integrates key work with clients, monitoring and reporting. Some versions are based on a 'ladder of change', which is an explicit model of the steps that service users take on their journey towards independence; others use other suitable progress scales. Other examples for measuring outcomes for individuals include the Rickter Scale, the SOUL Record and the Strengths and Difficulties Questionnaire, all developed in the UK.



#### The Ladder of Change

Think of an area of your life where you have made changes

What was it like before you had decided to change?

Do you remember thinking about change and then deciding you would really do it?

What was the first thing that you did?

See if your experience fits with the Ladder of Change



#### 4.4.2 For measuring other outcomes and impacts

There are many other tools for measuring outcomes and impacts, each with their own particular applications, advantages and limitations. Examples include:

- Local Multiplier 3 developed by the New Economics Foundation in the UK as a relatively easy way of calculating money flows within the local economy

- Outcome Mapping developed by the International Development Research Centre in Canada and used primarily in overseas development work
- Prove it! also developed by the New Economics Foundation in the UK for measuring the effect of small to medium community regeneration projects on the quality of life of local people
- Value of Infrastructure Programme of the National Council for Voluntary Organisations in England, which includes a range of tools and other resources for infrastructure organisations
- Volunteering Impact Assessment Toolkit developed by the Institute for Volunteering Research in the UK to assess the impact of volunteering

#### 4.4.3 For measuring social value

Directly linked to outcomes and impact, yet slightly different, is the concept of social value. The question here is not just 'what changed?', but 'how valuable was that change?' in the eyes of different stakeholders. The two main social value approaches are Social Auditing (also known as Social Accounting and Audit), which was particularly favoured a number of years ago, and Social Return On Investment (SROI), which is now gaining popularity. Both frameworks have a lot in common. Some people

worry that these approaches are too complex. However, they need not be too complicated and are based on sound principles that are useful to any organisation. For example, the seven principles underpinning SROI are:

- involve stakeholders
- understand what changes
- value the things that matter
- only include what is material
- do not over-claim
- be transparent
- verify the result

SROI is an approach to understanding and managing the value of the social, economic and environmental results created by an activity or organisation. It is a framework to structure thinking and understanding. Although one aspect of undertaking an SROI analysis involves the calculation of a financial ratio, SROI is about much more than numbers. The primary advantage of SROI is the story that shows how value is created (or destroyed), how this value can be proven and how it can be best managed.

## 4.5 Using technology

There are numerous information technology systems on the market for monitoring and reporting on outcomes, impacts and social value. Examples include Demonstrating Value, ImpactMap, Lamplight, Social Impact Tracker, Social e-valuator and Views (note: this list is not exhaustive – have a look online for links to these and other systems). Technological developments certainly have the potential to offer benefits for client data management, real-time tracking, numerical analysis, etc. However, it is imperative that you have a good understanding of the process of change and the basic concepts of impact measurement before rushing head first into any new software. Information technology is not a solution by itself. In this context, it is worth mentioning Enclude, which is a charity that develops technology solutions within the Irish community and voluntary sector and offers client management solutions with integrated outcome instruments, including the Outcomes Star.

### \*\*\* TOP TIP \*\*\*

The internet provides a wealth of resources on measurement tools and other aspects of outcomes-focused working.

## 4.6 Other supports

You do not have to go on your impact journey alone. There are many individuals and organisations that may be able to assist you. The signposting section towards the end of this guide is a good place to start. You will see that many of the signposts are to organisations outside Ireland, but there are also people in this country who might be able to offer supports, including:

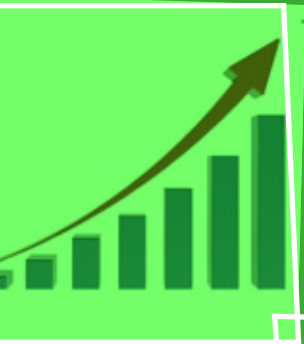
- infrastructure and intermediary organisations, such as Carmichael Centre for Voluntary Groups, the Centre for Effective Services, Social Entrepreneurs Ireland or The Wheel
- umbrella bodies, such as the Disability Federation of Ireland or the National Youth Council of Ireland
- funders, both statutory and philanthropic
- independent consultants, either offering methodology-specific or more general supports
- academics in third-level institutions

### \*\*\* TOP TIP \*\*\*

Clustering with organisations working in the same field allows you to support one another through the measurement process, learn from each other's successes and stumbling blocks, and agree common outcome frameworks.



# CHAPTER 5: Case studies



## 5.1 Introduction

This chapter provides examples of Irish organisations that have adopted an outcomes approach to some or all of their work. They are different in size, age, area of focus and geography, yet you will see that they share a number of commonalities. Each case study highlights the fact that focusing on outcomes is an ongoing process.

## 5.2 Ballymun Job Centre



The Ballymun Job Centre was established as a community response to a chronic unemployment situation. Its mission is to raise the skills and labour market aspirations of individuals in the Ballymun area of North Dublin and to promote the local labour force to potential employers. It believes that all persons have the right to employment and the right to realise their potential within the job market. To this end, the Centre has provided a wide range of services to create progression pathways for its clients. Since opening in 1986, more than 19,000 individuals have registered for the services provided by the Centre. Over 3,000 have participated in Centre training and over 5,000 have been supported to access jobs. Ballymun Job Centre is involved in an extensive range of initiatives at local, national and European level and therefore works with many different partners. The Centre has a full-time equivalent of 26 staff and manages a Jobs Initiative programme of a further 17 people.

The Ballymun Job Centre has always been a client-centred service. It places much emphasis on providing quality services to clients and has achieved both the Q Mark for Quality Management Systems and the Excellence Through People award. The Centre understood from the outset that the richness of the process that the client goes through is of great significance, moreover that outcomes differ for different clients. However, past reporting tended to focus solely on the outputs from specific interventions, did not capture the quality of the process itself, and furthermore, important qualitative information was often lost. Conventional evaluations did not easily demonstrate the social value generated by the work of the Centre, which was an issue in its own right, but which became particularly pressing against a backdrop of economic turmoil.

The Ballymun Job Centre decided to try out the SROI framework in two projects it is coordinating: the eMERGE Project of the Mount Street Trust Employment Initiative and a European Leonardo da Vinci project called MOTIVES. It is going through an SROI evaluation for the former and is developing an online training evaluation tool kit, also based on SROI, for the latter. It is working with social impact consultancy Gauge, which has also trained two Centre staff in the use of SROI methodology. It is piloting SROI on two aspects of the organisation's work to see how it might transfer across all the Centre's services and activities. It is hoped that the results of these processes will also be of interest to the wider community sector.

The main difficulty experienced to date has been the amount of time required to plan, conduct, research and finalise the SROI evaluation of the eMERGE Project. However, the benefits are felt to far outweigh this disadvantage and the organisation has no intention of returning to an output-only approach. The use of outcome and value approaches, particularly SROI, has been written into its strategic plan. The most profound effect has been the change in the way the team thinks. The organisation now understands that its stakeholders are far more diverse than previously recognised, and include the families of clients, other services, employers, the wider community, etc. Today, there is an explicit focus on providing an evidence base for activities, collecting information correctly and using this to demonstrate real value for all stakeholders.

**Ballymun Job Centre:**

[www.bmunjob.ie](http://www.bmunjob.ie)

**Excellence Through People:**

[www.nsai.ie/Our-Services/Certification/Excellence-Through-People.aspx](http://www.nsai.ie/Our-Services/Certification/Excellence-Through-People.aspx)

**Gauge:**

[www.gaugeni.co.uk](http://www.gaugeni.co.uk)

**Q Mark:**

[www.eiqa.com/certification/quality](http://www.eiqa.com/certification/quality)

### 5.3 Extern Ireland



Extern is a charity that works with partners to provide community-based services for people who have complex needs, especially children and young people who are at risk of entering care or custody, and their families/carers. Established in Northern Ireland in 1978, it has been operating in the Republic since the mid-1990s. It incorporated as Extern Ireland in 2004. It employs approximately 100 staff who work in three of the four Health Service Executive's regions, namely Dublin Mid-Leinster, Dublin North-East and West.

In 2008, Extern appointed its first Quality Assurance Manager, in recognition of the importance of adopting a quality approach to its work. By 2010, the organisation had achieved its Steps to Excellence Bronze accreditation within the EFQM Excellence Framework. At the same time, there was growing recognition of the need to be able to provide hard evidence of the results of its work, both for internal reasons (learning) and external reasons (competitiveness). The output data furnished on a monthly basis to its funders and the case studies and quotes in its annual reports were useful, but they were simply not enough.

There are many different facets to Extern's outcomes approach. After extensive research and thorough piloting, the organisation now uses the Strengths and Difficulties Questionnaires for children (aged over 11) and their parents/carers. This is a self-assessment tool, which is used to establish an initial baseline and which is completed again after six to nine months to check progress. The organisation has also started using the Social Skills Talkabout tools; these likewise allow for baseline testing and subsequent testing of progress. The organisation is standardising its stakeholder feedback forms (for referral agencies, children/young people, and families/carers) across all of its services on the island of Ireland and it is exploring ways of even more actively involving services users in all of its work. It contracted Fluent Technology to deliver a service user information database, which has the capability of providing information on outcomes as well as outputs. An external cost-benefit analysis of Extern's work in the city of Limerick found a 351% return on investment for the funders. The Quality Assurance Manager has undertaken SROI training with the SROI Network UK and will explore the viability of using this methodology for assessing the social value of Extern's work over the coming years. (The Outcomes Star and the Rickter scale are also being experimented with for some of the organisation's other services in Northern Ireland.)

Although it was initially challenging to 'get people's heads round' the outcomes question, a number of true champions within the organisation drove progress. No significant obstacles were met and there has been excellent buy-in, not least because staff members are motivated by seeing what the organisation as a whole is achieving.

**EFQM (in Ireland):**

[www.eiqa.com/certification/efqm](http://www.eiqa.com/certification/efqm)

**Extern:**

[www.extern.ie](http://www.extern.ie)

**Fluent Technology:**

[www.fluenttechnology.com/Clients-Basis-Extern.aspx](http://www.fluenttechnology.com/Clients-Basis-Extern.aspx)

**Outcomes Star:**

[www.outcomesstar.org.uk](http://www.outcomesstar.org.uk)

**Rickter Company:**

[www.rickterscale.com](http://www.rickterscale.com)

**Social Skills Talkabout:**

[www.shop.alexkelly.biz](http://www.shop.alexkelly.biz)

**Strengths and Difficulties Questionnaires:**

[www.sdqinfo.com](http://www.sdqinfo.com)

**SROI Network UK:**

[www.sroi-uk.org](http://www.sroi-uk.org)

## 5.4 Suas Educational Development



**Educational Development**

Founded in 2002, Suas is a movement supporting high quality education in under-resourced communities in Ireland, India and Kenya. During the startup phase, the organisation grew organically and rapidly, believing that bigger equalled better. From early on, Suas acknowledged the need to capture and communicate, both internally and externally, what it did and what difference this made. It therefore collected, collated and disseminated data on activities and outputs (and to a lesser extent, outcomes), but the processes for doing so were generally ad hoc.

As the organisation moved into the next stage of its lifecycle, it began to reflect on what it had achieved so far and what further change it wanted to effect. It recognised that it needed a greater emphasis on quality, a sharper focus and a more strategic approach. There were external drivers for this new way of thinking too; there was a growing demand for an outcomes focus by funders and the economic environment was deteriorating. Suas was particularly inspired by The Suddes Group's motto that 'impact drives income' and by two publications: Forces For Good and Start With Why, all from the USA.

There was therefore a move towards becoming more systematic about outcomes, first at programme level, later at organisational level. Annual review and planning processes supported the transition. Suas is evolving a theory of change and is increasingly 'designing for outcomes'. It engaged consultant Annette Honan to develop a clear results-based framework. Self-assessment by stakeholders remains the primary tool for measuring change. Testimonials are used regularly. Three programmes have undergone external evaluations. The organisation's literacy mentoring programmes are piloting the AcceleRead AcceleWrite methodology that uses pre- and post-intervention assessments to evaluate differences achieved. It found that the Wide Range Achievement Test 4 suited the Irish context particularly well.

The journey has not been without its challenges. Transformative change can be a frustrating, painful process. Funding-driven changes can feel imposed and lack creativity. Although funders want impact, they tend to be drawn towards outputs and are rarely prepared to invest in the organisational development required for enhancing outcomes. Admitting 'failure' to funders, even if they say they are open to hearing about this for learning purposes, is a high-risk strategy. It can be difficult to find the time and 'headspace' to focus on outcomes and can sometimes feel like a distraction from implementation. For complex outcome areas such as leadership, teamwork and citizenship, Suas has struggled to find appropriate frameworks that can objectively assess

change over time. There is an ongoing tension between hard outcomes (such as exam results) and soft outcomes (such as feeling empowered about learning), with the former often taking precedence due to ease of measurement, when the latter is arguably more important in the long-term. Furthermore, the full success or otherwise of some programmes will only become clear over a 10 to 20 year period.

However, the process has been powerful and encouraging. It has highlighted the need to mature, but also provided a framework for moving forwards. It has increased Suas' confidence in the value of its programmes and enabled it to be more open about areas that were working less well. Detailed data has enabled better programme design. It is becoming easier for the organisation to communicate the difference it makes and this is especially attractive to corporate donors. Suas intends to keep making incremental improvements to the design of outcomes and processes to evaluate these.

#### **AcceleRead AcceleWrite:**

**[www.edtech.ie/details.asp?id=16183&ptid=20031,20081](http://www.edtech.ie/details.asp?id=16183&ptid=20031,20081)**

#### **Annette Honan:**

**[www.linkedin.com/profile/view?id=90028306&locale=en\\_US&trk=tyah2](http://www.linkedin.com/profile/view?id=90028306&locale=en_US&trk=tyah2)**

#### **Forces For Good:**

**[www.forcesforgood.net](http://www.forcesforgood.net)**

**Start With Why:****[www.startwithwhy.com](http://www.startwithwhy.com)****Suas Educational Development:****[www.suas.ie](http://www.suas.ie)****The Suddes Group:****[www.forimpact.org](http://www.forimpact.org)****Wide Range Achievement Test 4:****[www.brainworx.ie/catalogue\\_allages\\_024.html](http://www.brainworx.ie/catalogue_allages_024.html)**

## 5.5 Value Added In Africa



Value Added in Africa incorporated as a company limited by guarantee in 2008. The organisation is resourced through limited statutory funding, donations of time and money from individuals, companies and foundations, and some commission. It has the equivalent of 1.5 paid staff, plus interns and a voluntary board of directors. Its focus is trade, not aid.

The co-founders knew from previous experience that hard evidence is more persuasive than slogans and that quality is paramount. The Small Foundation advised that they should effectively tackle the issue of scale, as the problem they are seeking to address is enormous. This helped cement their idea that they should ensure its model is spread and replicated by others. Dóchas recommended that the organisation formulate a theory of change. They did so, internally, and asked various external people to comment on drafts.

Firstly, the organisation articulated the theory of the problem: that despite exporting increasing quantities of commodities, poverty continues to be prevalent in many African countries. Secondly, it stated the beliefs that underlie its theory of change: that processing raw goods into more valuable products and trading these internationally can be significant drivers to exiting poverty (export prices of processed goods are 3-19 times higher than those of raw goods). Although increasing numbers of producers in Africa are already moving up the value-chain, there is a facilitation gap between processors and importers that the organisation seeks to plug. It strives to build the capacity of African producers to gain entry to international markets, which will act as a catalyst for other producers to export and for European wholesale and distribution companies to be more open to African goods. The activities arising out of the theory of change include research of suitable African producers, preparing them for international

marketing, building relationships with wholesalers, and public education about the role of value addition.

Measuring change is challenging if the issue you are addressing is immense, many of your stakeholders are on the other side of the world, much of what you are trying to achieve is outside your direct influence, and you are a small and under-resourced organisation. As Value Added in Africa is relatively new, it is still developing and testing its outcome and impact measurement tools. It is trying to find ways to more systematically capture the stories of real change that it hears are being brought about as a result of its work. It provides each African partner with quarterly feedback reports detailing all the outputs and short-term outcomes that have occurred and these provide a facility for partners to offer their feedback.

The organisation is planning to contribute to a number of business education courses in Irish third level institutions. It will undertake a baseline study of the knowledge and attitudes of business students and business leaders. This research can be repeated in several years to establish the extent of the intervention's success.

The organisation has learnt that you need to develop systems and processes for tracking outcomes as you go. It has also found that you need to tweak your theory of change as new evidence becomes available. Adopting an outcomes focus has provided the organisation with confidence that it is on the right track as well as the means of being truly accountable to its stakeholders, both in Africa and in Ireland. The organisation is involved in a number of exciting new projects and is expanding its geographical remit to the UK during 2012.

**Dóchas:**

**[www.dochas.ie](http://www.dochas.ie)**

**Small Foundation:**

**[www.smallfoundation.ie](http://www.smallfoundation.ie)**

**Value Added in Africa:**

**[www.valueaddedinafrica.org](http://www.valueaddedinafrica.org)**



## 5.6 West Limerick Resources



Established in 1993, West Limerick Resources is a Local Development Company providing a wide range of services. Its Primary Health Care Project for Travellers began in late 2010 and is a joint initiative with the Health Service Executive's Traveller Health Unit. It is one of a number of similar projects around the country. The project is delivered by eight trained Community Health Workers who are all members of the Traveller community, is managed by a Coordinator, and is overseen by an Advisory Group.

At the start of the project, a draft strategy was drawn up on the basis of discussions with relevant stakeholders. This was informed by the Scottish LEAP (Learning, Evaluation And Planning) for Health model. At the first meeting of the Advisory Group, it was recognised that whilst the draft strategy was a useful general and aspirational guide, there were no clear means of assessing success. It was decided that monitoring and evaluation should be built into the project from the beginning, so that information that might otherwise be lost would be gathered and so that strategies could be adapted if regular reviews showed this to be necessary. The project team had already drawn up simple but effective monitoring forms, used to record information on the daily interactions between the staff and individuals/organisations. It was agreed, however, that external expertise was needed to do further work on planning and evaluation and a subgroup was formed to manage a tender process.

Sheila Cahill Consulting and Whitebarn Consulting tendered successfully and worked with the project during 2011 to develop an integrated strategic plan and evaluation framework, based on the draft strategy. This framework comprises a mission statement, values and clearly worded inputs, outputs, outcomes and processes. For each of these, indicators are provided, data collection methods are given (including who will do the work and by what date) and it is clarified how and when progress will be reported on. The consultants also designed a questionnaire survey, which was administered by the Community Health Workers to a sample of Traveller households, and they analysed the results to establish a baseline. This survey will be repeated after two years to see if change has occurred, after which an overall evaluation of the project will take place, to be supplemented with qualitative work.

It has been learnt that planning and induction take time. However, time spent on, for example, demonstrating and learning the importance of maintaining accurate paperwork is time very well spent. It has also been learnt that too much emphasis on outcomes has the potential to sideline the process, which in itself is very valuable. And as the Community Health Workers are highly driven to make a positive difference, there is a risk that they can get bogged down chasing people to see if they have made lifestyle changes, which could both alienate the community and demotivate the workers.

On the whole, however, the Community Health Workers have ownership and responsibility for their work, and can see how their day-to-day work contributes to a bigger agreed picture. The monitoring and reporting processes are found to run smoothly and as an additional benefit, it is now very easy to provide data to other organisations that have supported the project. There is a very real sense of confidence that aspirations have been made realisable and measurable and that the project is on the right track.

**LEAP for Health:**

**[www.evaluationsupportscotland.org.uk/article.asp?id=62](http://www.evaluationsupportscotland.org.uk/article.asp?id=62)**

**Sheila Cahill Consulting:**

**[www.sheilacahill.ie](http://www.sheilacahill.ie)**

**West Limerick Resources Primary Health Care Project for Travellers::**

**[www.wlr.ie/primary-health-care-project](http://www.wlr.ie/primary-health-care-project)**

**Whitebarn Consulting:**

**[www.whitebarn.info](http://www.whitebarn.info)**

# CHECKLIST

	Yes	No	Don't know
Do we strive for quality in all that we do?			
Is there agreement throughout our organisation about the change we are trying to bring about in the lives of the people and communities we serve?			
Do we know if this is the change that is actually required?			
Can we logically link all that we do on a day-to-day basis to the change that we want to bring about?			
Do we have systems and processes in place to know if we are making a positive difference?			
Are we clear about what indicators might be used to show whether change is happening and how extensive it is?			
Do we have appropriate methods and tools to collect and manage the data we need?			
Can we analyse the data to show the nature of change?			
Are we telling the story of change in a clear, honest and compelling way to all our stakeholders?			
Are we prepared to alter our practice if evidence shows that some of our actions are not effective?			
Have we used all the resources that are readily available to us in order to maximise our impact?			

## SIGNPOSTS

[Also see the websites under each case study in chapter 5.]

### **Animating Democracy**

Resources from the US for evaluating the social impact of the arts.

**[www.animatingdemocracy.org/home-impact](http://www.animatingdemocracy.org/home-impact)**

### **Carmichael Centre for Voluntary Groups**

Training and other resources for community and voluntary groups in Ireland, including PQASSO.

**[www.carmichaelcentre.ie](http://www.carmichaelcentre.ie)**

### **Center for Evaluation Innovation**

Resources from the US for evaluating hard to measure areas such as advocacy, communications and systems change.

**[www.evaluationinnovation.org](http://www.evaluationinnovation.org)**

### **Centre for Effective Services**

Intermediary organisation in Ireland connecting scientific evidence of what works to policy and practice, to improve the lives of children, young people, their families and the communities they live in, offering an interesting range of resources

**[www.effectiveservices.org](http://www.effectiveservices.org)**

### **Charities Evaluation Services**

UK organisation that developed the PQASSO quality tool, also offering numerous planning and evaluation resources, including a report on outcome indicator banks.

**[www.ces-vol.org.uk](http://www.ces-vol.org.uk)**

### **Data Protection Commissioner**

For guidance on how to meet your organisation's data protection obligations.

**[www.dataprotection.ie](http://www.dataprotection.ie)**

### **Include**

Offering community and voluntary organisations practical and affordable information and communications technology solutions.

**[www.include.ie](http://www.include.ie)**

### **Foundation Center**

Very useful and detailed (if not exhaustive) US database of Tools and Resources for Assessing Social Impact (TRASI).

**[www.trasi.foundationcenter.org](http://www.trasi.foundationcenter.org)**

### **Institute for Volunteering Research (and Volunteer Now)**

Many resources on the impact of volunteering, including a toolkit to measure the impact of volunteer development agencies and the Volunteering Impact Assessment Toolkit (latter available in Northern Ireland from Volunteer Now)

**[www.ivr.org.uk](http://www.ivr.org.uk)**

**[www.volunteernow.co.uk/supporting-organisations/measuring-impact/volunteering-impact-assessment-toolkit](http://www.volunteernow.co.uk/supporting-organisations/measuring-impact/volunteering-impact-assessment-toolkit)**

### **Institute of Social Auditing of Ireland**

Promoting accountability through social auditing across Irish society.

**[www.partas.ie/Consultancy/SocialAuditing.aspx](http://www.partas.ie/Consultancy/SocialAuditing.aspx)**

### **Irish Charities Tax Reform Group**

For full information on the Guiding Principles for Fundraising.

**[www.ictr.ie/content/fundraising-codes-practice](http://www.ictr.ie/content/fundraising-codes-practice)**

### **Monitoring and Evaluation News**

Extensive information site on all aspects of monitoring and evaluation in an international development context, maintained by Rick Davies in the UK.

**[www.mande.co.uk](http://www.mande.co.uk)**

### **National Council for Voluntary Organisations**

English organisation offering excellent resources including guidance on full value and many practical impact tools.

**[www.ncvo-vol.org.uk](http://www.ncvo-vol.org.uk)**

### **National Standards Authority of Ireland**

For information on Excellence Through People, ISO 9001 and other quality matters.

**[www.nsai.ie](http://www.nsai.ie)**

### **New Economics Foundation**

Wealth of information from this UK organisation relating to outcomes, impact and valuing what matters.

Also home of the online version of the publication on which this guide is loosely based, including detailed guidance and a range of interactive tools.

**[www.neweconomics.org](http://www.neweconomics.org)**

**[www.proveandimprove.org](http://www.proveandimprove.org)**

### **New Philanthropy Capital**

Research and many other resources to 'help charities and funders do good, better' in the UK, including reporting impact.

**[www.philanthropycapital.org](http://www.philanthropycapital.org)**

### **Nexus Research**

Developers of the SPEAK system.

**[www.nexus.ie/index.php?page=speak](http://www.nexus.ie/index.php?page=speak)**

### **Social Entrepreneurs Ireland**

Supports high potential social entrepreneurs to enable them to maximise their impact.

**[www.socialentrepreneurs.ie](http://www.socialentrepreneurs.ie)**

### **Social Firms UK**

Various measurement resources including the Third Sector Performance Dashboard.

**[www.socialfirmsuk.co.uk](http://www.socialfirmsuk.co.uk)**

### **Social Return On Investment Network International**

Excellent video explaining the SROI process and other useful SROI resources.

**[www.thesroinetwork.org/sroi-analysis](http://www.thesroinetwork.org/sroi-analysis)**

### The Governance Code

A proportional code for the governance of any community, voluntary or charitable organisation.

**[www.governancecode.ie](http://www.governancecode.ie)**

### The Guild

UK-based social enterprise offering range of impact resources, including a guide on Getting Started in Social Impact Measurement.

**[www.the-guild.co.uk](http://www.the-guild.co.uk)**

### Theory of Change Community

For everything about the theory of change, including software.

**<https://www.theoryofchange.org>**

### The SOUL Record

Soft Outcomes Universal Learning: 'measuring the immeasurable' from the UK.

**[www.soulrecord.org](http://www.soulrecord.org)**

### The Wheel

Events, publications and advice on outcomes-focused working and other good practice issues for Irish community, voluntary and charity organisations.

**[www.wheel.ie](http://www.wheel.ie)**

### The World Café

Explaining the World Café approach to large group dialogue in full detail.

**[www.theworldcafe.com](http://www.theworldcafe.com)**

### University of Wisconsin - Extension

Practical tools for developing logic models and other programme development and evaluation topics from the US.

**[www.uwex.edu/ces/pdande/evaluation/evallogicmodel.html](http://www.uwex.edu/ces/pdande/evaluation/evallogicmodel.html)**

### Urban Institute

This US organisation provides some interesting resources, including the Outcomes Indicators Project, delivered jointly with the Center For What Works. This comprises sample indicators, logic models and more for 14 different types of projects.

**[www.urban.org/center/cnp/Projects/outcomeindicators.cfm](http://www.urban.org/center/cnp/Projects/outcomeindicators.cfm)**

## GLOSSARY OF TERMS

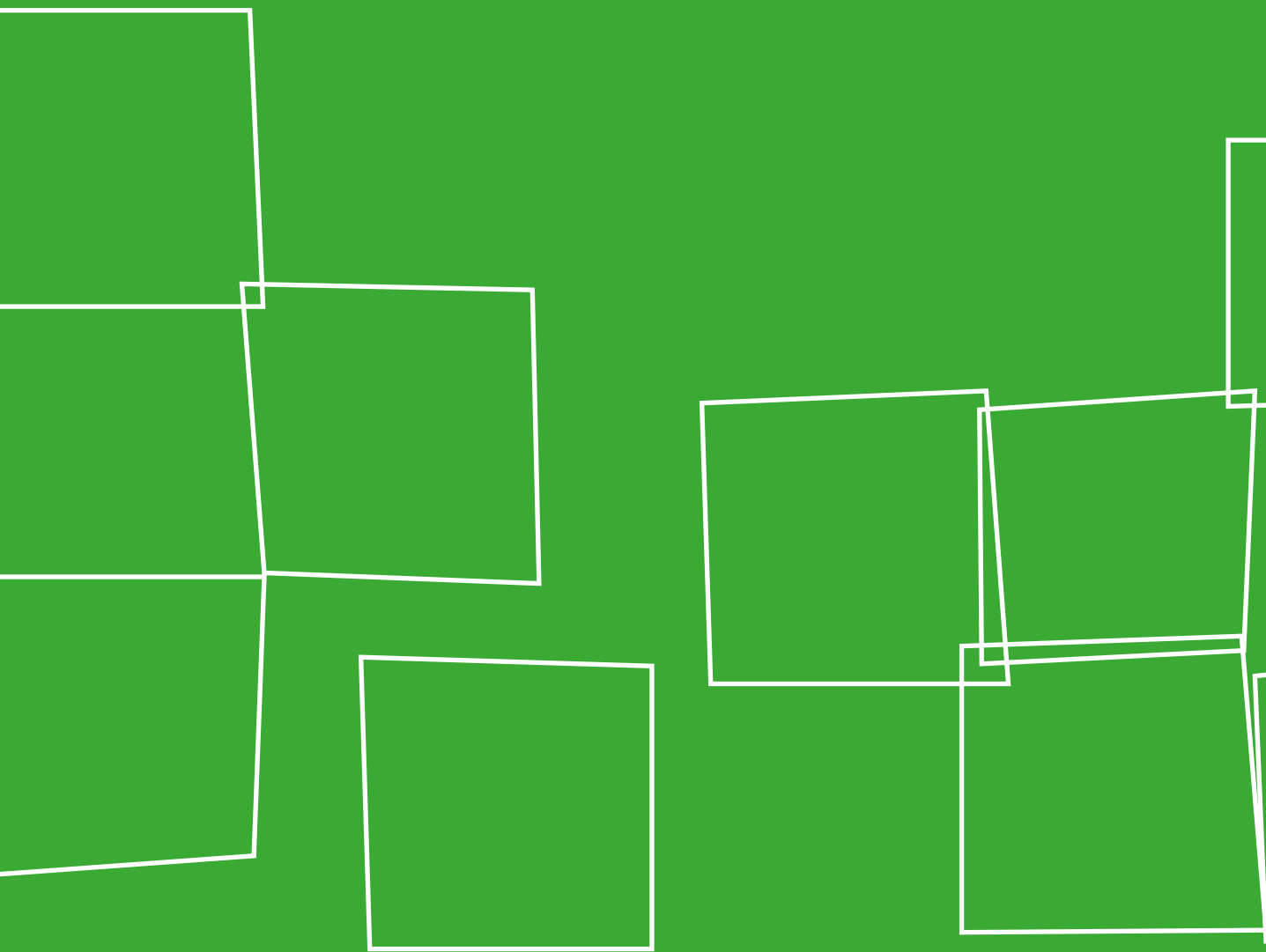
- Accountability** An obligation or willingness to accept responsibility for one's actions and its effects; someone who is accountable is responsible, open and transparent.
- Activities** The actions, tasks and work an organisation carries out.
- Aims** Particular changes or benefits an organisation plans to bring about.
- Baseline** Information about the situation that an organisation is trying to change, showing what it is like before it intervenes; an imaginary line used as a starting point for making subsequent comparisons.
- Beneficiaries** Service users or others who benefit from an organisation's activities.
- Collaboration** Working jointly with other organisations in order to further both organisations' goals.
- Control** A group not receiving an intervention, used as a standard of comparison for checking the results of an intervention provided to another group.
- Cyclical** Events that happen one following the other, and which are usually repeated.
- Data** Information collected for examination and consideration and used to help decision-making.
- Distance travelled** Progress made towards final outcomes, usually used in the context of individual service users. See also 'intermediate outcomes'.
- Evaluation** Using monitoring and other information to make informed judgements on how an organisation, programme or project is performing.

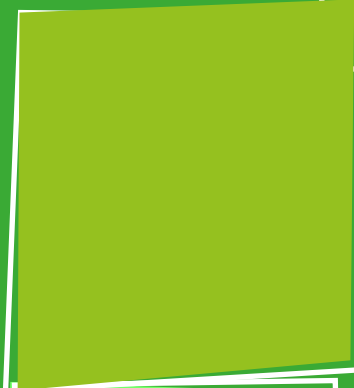
- Governance** The systems and processes concerned with ensuring the overall direction, supervision and accountability of an organisation.
- Governing body** The grouping of people in an organisation who undertake the governance role. Often known as the 'board' or 'committee'.
- Hard outcomes** Outcomes that are clear, obvious and easily quantified.
- Hypothesis** A proposed explanation for something that is based on limited evidence and has not yet been proven, but is the starting point for further investigation.
- Impact** The broader, longer-term social, economic or environmental change effected by an organisation. Impacts can be intended and unintended, as well as positive and negative.
- Implementation** Putting a decision or plan into effect.
- Indicators** Well-defined information showing whether something has occurred or has been achieved.
- Inputs** The resources that an organisation uses to carry out its activities and further its goals.
- Intermediate outcomes** Sometimes known as interim outcomes, these are smaller changes that happen as steps on the way to final outcomes. See also 'distance travelled'.
- Iterative** A process in which one cycle feeds into the next cycle.
- Jargon** Special words and phrases are used by particular groups of people, especially in their work.
- Logic model** A logical representation of how an organisation's inputs, activities, outputs, outcomes and impacts are interlinked.



- Mission** The overall purpose of the organisation, usually concentrating on the difference it wants to make.
- Monitoring** Regularly and systematically collecting and recording information that can be used to check progress against plans and thereby enable evidence-informed evaluation.
- Objectives** The areas of activity or practical steps an organisation plans to accomplish its aims.
- Outcomes** The short-term to medium-term changes that result from an organisation's activities. Outcomes can be directly or indirectly as a result of intervention by the organisation; they can be planned or unplanned; and they can be positive or negative.
- Outputs** Products, services or facilities directly resulting from an organisation's activities. Outputs are usually given as numbers.
- Piloting** To test something before introducing it more widely.
- Qualitative information** Information having to do with the characteristics of what is being discussed. It is generally descriptive, but can also be assigned numeric values. It responds to questions of how, when, who, where, which, what and why.
- Quality** A term used to describe a high level of functioning, or excellence, in the various aspects of an organisation, such as how it is run and the services it delivers. This can be measured according to external standards or can be seen as to the extent to which the organisation satisfies the expectations of its stakeholders.
- Quantitative information** Information having to do with a quantity, a number or a percentage. It responds to questions of how many, how much, how often and how long.

- Reporting** To give a formal account of what has happened.
- Risk** Any situation involving exposure to danger or threat.
- Sampling** To draw a representative portion of an overall group (a population).
- Social value** The full value of any initiative as defined by all stakeholders.
- Soft outcomes** Outcomes that are less tangible and therefore more difficult to measure than hard outcomes.
- Stakeholders** Individuals or groups who are affected by, or who can affect, the activities of an organisation or otherwise have a legitimate interest in the organisation.
- Strategic planning** Formalising the future goals of the organisation and the steps necessary to achieve these over a defined period of time; usually three to five years.
- Target** A defined level of achievement that an organisation sets itself to attain in a specified period of time.
- Theory of change** A description and graphical depiction of an organisation's change process showing all interconnected building blocks required to bring about long-term goals.
- Values statement** A statement outlining the ethos, principles and basic beliefs of an organisation and guiding it in the way it does its work.
- Vision** The ideal state the organisation wants the world to be in and the reason the organisation was founded.





Community, voluntary and charity organisations exist to make a difference in the lives of the people and communities that they serve. Quantifying, measuring, understanding and communicating that difference can however pose significant challenges.



This guide has been developed by The Wheel to help community, voluntary and charity organisations to develop an outcomes-focused and impact-led approach to their work by:



- Explaining the key concepts and benefits of the outcomes-focused and impact-led approach
- Introducing sample indicators and impact assessment tools
- Highlighting a number of relevant case studies
- Signposting to further information and resources

## The Wheel

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