MEASURING THE GOOD

MEASURING THE GOOD HANDBOOK

Measuring the Good is a practical approach for organisations in the UK to measure their social impact and improve organisational performance with support and guidance from skilled volunteers.

With thanks to all the organisations and willing volunteers who generously gave their time and skills to help us improve Measuring the Good.

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This is the second edition (2016) of the handbook, known formerly as The Practical Approach handbook which was originally edited by Marina Sevier and Brian Smouha from the Coalition for Efficiency.

The programme was developed by:

Coalition — For Efficiency —

In collaboration with:

VOLUNTEERING MATTERS

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FOREWORD

Charities are faced with wavering confidence in their financial effectiveness and an increasing demand to demonstrate their impact and value for money to donors, funders, investors, beneficiaries and the general public. The first step to greater efficiency is for an organisation to focus on its mission and measure its results. When competition for funds is fierce, improving efficiency can strengthen the case for funding and make limited resources go further. If the charity sector alone was to save just 1% through greater efficiency, it is the equivalent of the sector collectively raising over a staggering £400 million extra each year (based on figures in NCVO's 2015 Almanac). This is a sum worth striving for. In today's economy, there has never been a more critical time for charities to be more efficient.

The aim of Measuring the Good is to find a simple, practical and scalable way to empower organisations with a social mission to measure and manage their outcomes and performance regardless of where they are on their journey. It was found that this was achieved economically through leveraging the resources of skilled volunteers and combining their expertise and commercial insight with the knowledge and experience of the organisation's leadership team and staff.

The Coalition for Efficiency (CfE), working with other organisations, developed this simple and effective method in 2012. After an initial pilot, the first series was carried out by Volunteering Matters with support from CfE and demonstrated the benefits to be gained from this approach. During the first series, skilled volunteers with business or public sector experience helped the organisations establish or improve their mission-focussed outcomes, indicators and performance metrics. The feedback and learning from the participants have been incorporated into this updated handbook to provide a high-quality and practical guide with relevant and useful information for organisations.

In the external evaluation of the first series, participating organisations reported that the physical presence of an external/neutral person working with them on the programme meant that 'homework' had to be completed, deadlines met; and that this was a major motivator in keeping focused and where possible, on schedule. Organisations also said the personal contact with a volunteer was key to making progress around impact measurement. The careful matching process which took place before the programme commenced was well considered and seems to have been a factor in how well participants felt able to proceed with the programme. All this serves to highlight the importance of having the programme carefully managed and delivered by a third party.

We acknowledge the existence of a wide range of tools, models and frameworks addressing impact measurement for charities and social enterprises. In Part Three, we provide a list of useful tools, as well as organisations that are providing lectures, courses and consulting on the subject. We believe that combining the attendance at training courses with the Measuring the Good approach can only assist in deepening the learning process and enhancing the quality of impact measurement within the organisation. Measuring the Good takes the theory of change concept into the field and provides the organisation's leadership with a guiding hand from a critical friend whilst also creating an opportunity for reflection and for the exchange of ideas.

Brian Smouha
Founder of the Coalition for Efficiency

AN INTRODUCTION TO MEASURING THE GOOD

The Measuring the Good handbook outlines how experienced professionals from the business, public and third sectors can volunteer their management skills to help organisations[1] across the UK access practical assistance on measuring their social impact[1].

Measuring the Good is designed specifically for small to medium sized organisations[2] with charitable aims and will:

- Help the organisation get started on its impact measurement journey;
- Provide the organisation with the tools to improve their overall impact and the effectiveness of the organisation;
- Help the organisation take steps towards communicating their achievements more broadly in a transparent and meaningful way;
- Help encourage organisations to focus on a results-driven culture to maximize the benefits and enhance the important and necessary work they carry out.

The project is founded on the basis that the CEO is the expert in the organisation and sector; the volunteers bring external, strategic perspective with a fresh insight into management and measurement. The CEO leads the project, with the support of a trustee and senior staff, and the volunteers act as facilitators, mentors and advisors rather than consultants. They use their experience and an external perspective to provoke discussion, educate and guide the organisation to create and find practical ways to measure and manage performance and impact.

"The volunteer's key challenge is that they need to go into an unfamiliar environment and with no authority, quickly build a relationship and gain the respect of the CEO and executives of a charity. The volunteer has to support and encourage the charity to adopt useful management tools that do not necessarily sit comfortably with the culture of the organisation.

The task is to open people's eyes and guide them while remembering that the charity executives are the experts in what they do. It is essential that volunteers can think on their feet, be able to ask difficult questions gently and apply business practice to a new and very different situation. It's not easy but it is fantastic when the penny drops."

Measuring the Good volunteer

1 Any organisation (charity, social enterprise, CIC, CIO, IPS, etc.) that exists to fulfill a social mission can benefit from the Measuring the Good approach.

2 We recognise that the term 'impact' can represent the broader or longer-term effects that can arise but for the purpose of this project, impact/outcomes/results mean one and the same.

3 Larger, more complex charities and social enterprises might be better suited to a tailored, more in depth evaluation with specialist impact consultants (see further resources in Part Three), however they are welcome on the programme.

1: INTRODUCTION

FOR ORGANISATIONS

Measuring the Good shows how organisations can work with experienced professionals to identify, establish and develop outcomes and demonstrate results. The process can dramatically improve the way all the players in the organisation focus on its mission and strategy, demonstrate its achievements and increase the benefits it provides to society.

Benefits to the organisation

- Achieve greater transparency and accountability
- Achieve greater confidence and understanding of the organisation's achievements
- Demonstrate achievements and strengthen the case for funding
- Improve communication with stakeholders e.g. trustees, beneficiaries
- Increase support and engagement from the board
- Improve strategic focus and services where necessary
- Incentivise staff by demonstrating the results of their work

What is the time commitment?

The project involves six key stages. The first four stages run over a course of 2–4 months, with the follow up meeting 6–9 months later. We acknowledge that time is a particularly scarce resource for CEOs and Senior Managers taking part. However, we recommend that the first four steps be completed within a 4-month period to make the time investment worthwhile. The CEO (or the person within the organisation responsible for driving the process) will need to allocate around 12–15 hours for meetings and an additional 10 hours preparing for the scheduled sessions. Other members of staff will be involved at various stages.

Which organisations can take part?

The project has been constructed to recognise that each organisation is different and to accommodate their distinctive purposes, activities and culture. The following criteria must apply:

- Be an organisation based in the UK that exists to fulfil a social mission
- Have a clear mission and definable activities
- Have the capacity/resources to commit seeing the process through and implementing necessary changes
- Have a CEO in post (or working within the organisation) for at least 6 months
- Have a trustee willing to support the process
- Have dynamic leaders who are receptive to innovation and committed to driving improvements

The organisation's responsibilities

As the CEO, it is vital that you lead the process and see it through. You'll need to brief your team on the project and decide which members of your team should be included in the sessions with the volunteer.

Involving senior team and other staff in the process provides them with the opportunity to learn about and buy-in to the project, and can provide the volunteer with a useful and different perspective on strategic and operational matters.

It is essential that a designated trustee can provide board representation and support to you. It is the trustee's responsibility to inform the rest of the board on the learning from the project and lead the implementation of any actions at board level.

FOR VOLUNTEERS

Measuring the Good provides a structured framework for skilled, experienced professionals from any sector to apply their management expertise to assist charitable organisations, while also providing an opportunity for personal and skills development and gaining experience in a different sector.

Benefits to the volunteer

- Gain personal satisfaction by helping multiple beneficiaries
- Broaden experience in a new environment with different strategic issues
- Develop professional, interpersonal and leadership skills
- Apply business skills and experience for charitable benefit
- Be intellectually stimulated and help build the capability and capacity of a whole organisation
- Improve work-life balance and connect with the community

What is the time commitment?

The role of the volunteer can be undertaken alongside full-time employment or other commitments. Volunteers will need to dedicate 12–15 hours for meetings over the course of 2–4 months and spend an additional 10 hours preparing for the scheduled sessions.

Who can become a Measuring the Good volunteer?

The ideal volunteer will meet the following criteria:

- Leadership experience in middle or senior management
- Experience of using metrics and key performance indicators to manage a project or organisation
- Experience of working in diverse environments
- Experience of facilitating people and of motivating people
- Strategic thinking
- A good listener with empathy and commitment to the ethos and values of the charity and social enterprise sector

Volunteer responsibilities

Your role is to help the CEO focus on the organisation's mission and be able to define its activities and achievements. At the heart of this, you need to help the CEO identify or develop sensible and usable metrics that enable them to track and evaluate the organisation's activities and outcomes. These need to relate to both quality and quantity[3].

The volunteer is responsible for producing meeting agendas as well as a summary and actions following each session. The volunteer will need to be prepared to allocate time to complete any homework between the sessions.

3 See section on Quality & Quantity

INGREDIENTS FOR GOOD IMPACT MEASUREMENT

Measuring the Good identifies six key components of an organisation's operations that must be addressed for effective impact measurement. Some components are relatively simple to define and apply while others will be part of the organisation's longer-term aims of organisational development and impact evaluation.

Early attention to these components and constant consideration of their importance is vital to the effectiveness of the project.

1 **Clear mission:**
Does the organisation understand its purpose: why is it here and who is it here to serve? Are the mission and aims clear? Do the board, senior executives and other staff members understand and focus on them?

2 **Theory of change:**
Can the organisation clearly define each step within its activities that leads to its short, medium and long-term intended achievements?

3 **Strong board governance:**
The board need to play a guiding and challenging role. Board meetings should include discussion of data relating to quality and quantity of outputs and outcomes.

4 **Robust data collection:**
Systems should not be complex or expensive but realistic, reliable and within the resources of the organisation. Does the organisation systematically collect basic operational data and is there a base upon which to build? Is the organisation collecting data it does not use or need?

5 **Using measurement for management:**
The senior management team needs to be open to introducing necessary changes and using information and data to guide operational decisions. Are there examples of the organisation using data in the course of day-to-day operations and to inform decisions?

6 **Performance culture:**
Measurement should be embedded throughout the organisation. It is an effective tool to motivate staff, improve their performance and guide their work. Do staff members use data to improve their work? Is there a system for keeping all levels of staff informed and reviewing feedback? Are staff members encouraged when they make suggestions and deliver improved results? Is it part of their job description?

QUALITY AND QUANTITY

There is a concern within the charity and social enterprise sector that the effect of seeking to do more for the same monetary amount will automatically lead to a reduction in quality. This does not need to be the case with a well-managed organisation.

When identifying the mission and outcomes in practical terms, regard should be given to the balance of supply and demand of the services. Where appropriate quality standards should be identified and communicated. In some cases, achieving a higher quality standard – although desirable – might restrict the volume of service and leave potential beneficiaries deprived of the support they need. Similarly, a low quality standard may reach many more beneficiaries but risks not creating any lasting impact.

It is therefore recommended that the organisation put in a place a system to monitor quality and ensure that the appropriate level is maintained.

I learned so much. Primarily, I developed assertiveness and decision-making skills. Unlike my day job, there was no-one to tell me what to do, I had to figure it out myself and stick to my guns. I also learned how to work in different environments, which face different challenges. The charity was low on staff, time and money so the solutions needed to be more creative.

The improvements the organisation made will help them to save valuable time in admin work so they can spend more time supporting families. The work has also helped them to understand how they can better understand the support families need and see their progress. This will help them serve the families better and record better outcomes. I'd like to think I've provided the organisation with the skills and a structured methodology to do this process themselves in the future.

Measuring the Good volunteer

1: INTRODUCTION

THE VALUE OF INDICATORS

The Measuring the Good process encourages organisations to identify and develop its own set of indicators or Key Performance Indicators[4] (KPIs). These metrics should provide an organisation's management team with a measure of its performance and effectiveness; helping increase the degree to which the organisation is succeeding in proving its value to its beneficiaries. They are basic metrics that enable management to examine what works and what does not work within its activities, allocate resources efficiently and manage performance for continuous improvement.

For monitoring and evaluation purposes, organisations in the charity and social enterprise sector are encouraged to develop indicators that can be used to measure and monitor both outputs (activities, services and products provided) and outcomes (changes that occurred). There will often be other performance indicators comprising of operational or departmental data and metrics feeding into them.

Indicators are an essential tool for all trustees' governance and stewardship of an organisation. It is mainly through the review of indicators that trustees, funders and other stakeholders can fully understand the quality and quantity of the services or activities delivered by the organisation as well as satisfy themselves as to the accountability of the organisation's management and staff. It is useful to review and adapt indicators as the organisation changes and as information sources develop. An annual review is recommended.

- Indicators are a tool for measuring performance but need to be set in the context of the organisation 's strategy and objectives from which target indicators can be set.
- Indicators should set a quality standard and monitor quality as well as quantity.
- Indicators should be accompanied with appropriate commentary to explain performance and movement from prior period/year or against the target.
- Indicators should not be restrictive but are a tool to assist in understanding the activities and performance of an organisation.
- The measuring of indicators should not be a significant burden to the organisation and should be proportionate to the size of the organisation – the data should ideally be collected as part of the day to day activities.
- Indicators are specific to the organisation and should be specific and never collected 'just for the sake of it'. Organisations that share similar outcomes will not necessarily use the same indicators.
- Discussion and participation of staff at every level in the preparation and use of different indicators is important so that they become a tool belonging to the whole organisation.

4 KPIs are widely used in the business world and are defined as a set of quantifiable measures that a company or industry uses to gauge or compare performance in terms of meeting their strategic and operational goals.

CODE OF CONDUCT

During the course of any project there is scope for misunderstanding. By working within the principles of Measuring the Good outlined below, organisations and volunteers can avoid many of the most obvious pitfalls and ensure a good working relationship.

THE EXPERTISE LIES WITHIN THE ORGANISATION

The volunteer must respect and rely on the expertise and experience of the organisation's CEO (or project lead) and senior staff at all times. The organisation's staff members recognise that they are the experts in what they do and it is the volunteer's role to facilitate and guide them.

THE VOLUNTEER FACILITATOR

The volunteer's role is to ask questions, facilitate, guide and where necessary, provoke discussion and debate. The volunteer challenges and encourages the organisation's staff professionally always acting with empathy, respect and care.

PREPARATION FOR MEETINGS

Both the project lead and the volunteer must undertake the necessary preparation between meetings, sharing any relevant materials and setting the agenda in advance. The Measuring the Good representative should be kept updated on progress.

OPENNESS AND CLEAR EXPECTATIONS

A successful volunteering project requires both the organisation's project lead and the volunteer to be clear from the outset on each other's motivations and expectations. During the first meeting both parties will agree on a shared goal and clarify their respective roles and responsibilities.

STAY WITHIN PROJECT SCOPE

Both parties should stay resolutely on course in the meetings to focus on the objectives of the project, however tempting it might be to drift off course and address wider issues. It is important that the volunteer does not comment on matters of management and operations which are outside the objectives of the project. Similarly, the organisation should refrain from asking the volunteer for support in other areas until the project is completed.

CONFIDENTIALITY

All project communication remains strictly confidential between the organisation, the volunteer and the Measuring the Good team.

BACKGROUND READING

The publications linked below are useful background reading for both the organisation and the volunteer to inform discussions around impact. If you are viewing this handbook offline, please Google the publication titles. Further resources are listed in Part Three.

The Code of Good Impact Practice
(Inspiring Impact)

Using Research Evidence: A Practice Guide
(Nesta and Alliance for Useful Evidence)

Building your measurement framework: Four Pillar Approach
(New Philanthropy Capital)

Creating your theory of change: NPC's Practical Guide
(New Philanthropy Capital)

The Little Blue Book
(New Philanthropy Capital)

How to Build a Theory of Change
(NCVO Knowhow Nonprofit)

The Guide to Social Return on Investment, in particular the Seven Principles
(Social Value UK)

Making sense of evaluation: A handbook for everyone
(Ministry of Social Development, New Zealand Government)

Thinking big: How to use theory of change for systems change
(New Philanthropy Capital)

How to Measure and Report Social Impact: A Guide for investees
(SIB Group)

What is Social Accounting and Audit
(Social Audit Network)

Develop Programme Theory
(Better Evaluation)

Leap of Reason: Managing to Outcomes in an Era of Scarcity
Mario Morino, 2011

Working Hard – and Working Well: A Practical Guide to Performance Management
Dr David E.K. Hunter, 2013

MEASURING THE GOOD IN SIX STEPS

STEP 1:

Introductions and setting expectations

The volunteer meets the CEO of the organisation, accompanied by a volunteer manager. They exchange backgrounds and set expectations for the project. The CEO briefs the team on the project and decides which members of staff should be involved in the different sessions. This briefing also serves to get buy-in to the project across the organisation.

STEP 2:

Getting to know the organisation

The CEO spends time with the volunteer so that they can understand the work of the organisation, its mission, aims, activities and challenges, and the benefits of their activities. This might include senior and frontline staff briefing the volunteer on their responsibilities.

STEP 3:

Exploring current monitoring and evaluation methods

The volunteer facilitates a discussion with the CEO and operational staff to understand the current information management system and resources, what information is collected, used and could be collected.

The CEO discusses the process to date with a chosen trustee to ensure they understand the project's objectives and the purpose of the session that they will be involved in.

STEP 4:

Identifying measures and setting an action plan

The volunteer works with the CEO, executives and a trustee to help define meaningful and proportional metrics for internal and external use. A trustee needs to be present at this meeting so the board can support the implementation of the project. This session should include a discussion on how metrics are used and communicated to different audiences – board, staff, beneficiaries and funders.

The CEO and volunteer report their feedback and learning to the assigned volunteer manager who facilitates a discussion to resolve any issues.

STEP 5:

Implementation

The CEO and staff begin implementing the impact measurement processes using the identified metrics.

STEP 6:

Review

6–9 months later, the volunteer contacts the CEO to review progress and both parties feed back to the volunteer manager.

2: THE PROCESS

RECOMMENDED TIME FRAME

This is a suggested timeframe to guide you through the process.
The steps may overlap and you may feel you need to go back.

PERIOD	ACTIVITIES	WHO'S INVOLVED
Week 1	**STEP 1:** Introductory meeting (approx. 1 hour)	CEO, volunteer, volunteer manager
Week 2–3	**Internal meeting to brief the team:** Volunteer and organisation read background material for next step	CEO, senior staff (e.g. CFO, programme director), volunteer
Week 4–7	**STEP 2 & 3:** Preparation and two separate meetings to review details of the organisation and existing methods/ systems (each meeting approx. 2 hours)	CEO and senior staff, volunteer
Week 8	**Internal meeting:** the chosen trustee is briefed by the CEO (approx. 1 hour)	CEO, trustee
Week 9–11	**STEP 4:** Preparation and meeting to identify measures and set an action plan (meeting approx. 3 hours)	CEO, trustee (and senior staff – optional), volunteer
Week 12–14	**Project debrief and feedback**	CEO, volunteer, volunteer manager
Week 14 onwards	**STEP 5:** Implementation	CEO and all staff
6–9 months later	**STEP 6:** Review	CEO, volunteer, volunteer manager

STEP 1

Introductions and setting expectations

Following an email introduction, you'll need to arrange the introductory meeting. The volunteer manager will also attend this first meeting in order to provide a summary of the process and to answer any outstanding questions about the programme. The purpose of this meeting is to exchange backgrounds and expectations of the project, and confirm that both the CEO and the volunteer are happy to work together through the process. Once you've done this, discuss the agenda for the next step and diarise dates for the process. This will require some forward planning and you can use the suggested timeline to help you frame the process.

For the project to be successful, the CEO must be the one to lead the process. The CEO must give the project a degree of priority and be willing and able to work with the volunteer and within the recommended timeframe of 2-4 months.

The CEO should be prepared to provide the volunteer with any documentation that is already available and might be useful to review in preparation for the next steps e.g. strategic plan, annual report and accounts, impact report, board minutes, organisational chart, work relating to KPIs, management accounts and information.

This information is to be treated in total confidence by the volunteer.

The volunteer should seek out, learn and understand the motivation of the CEO and understand their time pressures. The volunteer can help emphasise the need for and the benefits that flow from using metrics to manage activities and measuring outcomes.

Those running the organisation are the best people to do so and are the drivers; the volunteer will help with the navigation.

Check:

- ☐ Have you each shared your expectations for the project?
- ☐ Has the CEO provided a brief description of the current state of the organisation's impact measurement?
- ☐ Have you agreed which documents it will be useful to send to the volunteer to review?
- ☐ Have you set a timetable for the sessions and where the meetings are to take place?

Step 1 continues overleaf

STEP 1

Homework for the organisation:

1 Send relevant documents to the volunteer.

2 Brief your team:
It is vital to ensure that your team understand the project and you have buy-in across the organisation. The project is likely to lead to changes that will affect the whole organisation (new information and data might need to be collected and it might lead to a new information management system). You therefore need to explain the project and its objectives to a wider audience of staff.

3 Decide which staff members are to be involved in the different sessions.

4 Fix a suitable agenda for STEP 2.

Example agenda:
Introduction – brief outline of the background of different staff
About your organisation
Mission
Objectives
Activities
Organisational structure
Challenges facing your organisation
Current developments in strategy and plans
Financials
Board skills and engagement

5 Look at some of the suggested background reading in Part One.

6 Consider attending a course on monitoring & evaluation / impact measurement (please refer to Knowledge Building and Training Opportunities in Part Three).

Homework for the volunteer:

1 Read through the relevant documents sent to you by the CEO in order to develop a clearer understanding of the organisation in preparation for Step 2.

2 Look at some of the suggested background reading in Part One.

NOTES

STEP 2

Getting to know the organisation

The purpose of the session is for the volunteer to understand the organisation - its mission, activities, culture and the challenges and opportunities that it faces. It might be relevant for the volunteer to meet with different staff members and observe some of the services that the organisation delivers, in which case it might be easier to spread this step over two meetings.

The volunteer will need to use clear questions to help identify, establish and measure the purpose for which the organisation exists. Look to create a synergy between the experience and curiosity of the volunteer and the knowledge and expertise of the CEO.

While it might sound overly simple and unnecessary, the first step is being able to clarify, focus on and articulate: Why does the organisation exist? What is it doing? How much is it doing? And how well does it consider it is doing it?

Through a facilitative approach and questioning, the volunteer can help the CEO to articulate what small steps and elements lead to the organisation's achievements. During this process, it is important to identify the human, material, organisational and financial resources needed to deliver the activities.

Points for discussion:

- Mission and objectives
- Activities and services
- Financials and resources
- Strategy and plan
- Board and governance
- Organisational structure
- Fundraising

Questions that the volunteer might ask to facilitate this discussion:

- Why does this organisation exist?
- What is it you are trying to solve or address?
- Do the staff and trustees agree on and are they aware of the mission?
- What is the organisation's vision and what changes is the organisation trying to bring about?
- What activities and services does the organisation deliver?
- How can you tell if you are succeeding or if something is going wrong?
- For what and why are you receiving funding?
- What keeps you awake at night?
- Are you able to identify any failures?
- How are the activities linked to the mission?
- How do the activities achieve the objectives and lead to change?
- What are your resources to deliver your activities?
- Are the resources adequate for the task?
- Is there a coherent plan?
- Do all of your trustees fully understand how your activities work?
- What accountability mechanisms do you have in place?
- What might you like to say at the AGM or other annual event to demonstrate your achievements and to show that you have achieved the organisation's objectives?
- Have you received any useful feedback from funding applications that gives any insight into shortfalls and challenges?

Step 2 continues overleaf

STEP 2

Check:

- ☐ Do you have a date fixed for the next session?
- ☐ Have you discussed what additional information will be useful for the volunteer to review ahead of the next meeting?

Homework for the organisation:

1. Provide the volunteer with any useful documents.
2. Prepare for the next meeting – who on your team might attend? What information might inform the discussion?
3. Continue to review suggested background reading materials in Part One.

Homework for the volunteer:

1. Email the CEO a summary of the key points and actions from the meeting, copying in the volunteer manager.
2. Confirm the next meeting and propose a suitable agenda which the CEO will need to agree on.

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STEP 3

Exploring current monitoring and evaluation methods

In this session, the volunteer will facilitate a discussion with the CEO and other staff to identify where information is already being collected by the organisation, consider if it could be used more effectively, and see where there are gaps in measurement against the organisation's purpose.

The volunteer needs to meet with the staff responsible for data collection to get an understanding of the practicalities and scope of the organisation's current information management system and resources (staff expertise and time, software, funds). The volunteer needs to understand the limits on what can be collected and monitored in the current system.

It will be helpful for the volunteer to spend time with some of the staff members that are responsible for using the current information system day-to-day as well as the staff that are responsible for the management of it.

There is no reason to exclude project or departmental measurements as these should be relevant to the organisation's overarching objectives; however, they should not be confused with the wider mission related measurements that the project is focusing on.

Questions that the volunteer might ask to facilitate this discussion:

- How do you know what you are achieving?
- What are the measurable short and longer-term objectives?
- Do you have evidence on your results?
- What information do you collect on each activity?
- What data is readily available and collected?
- How do you test the effectiveness of the activities?
- How do you currently use data?
- Are there examples of using data to inform operational decisions?
- What steps are being taken to achieve the desired outcomes and what resources are required to achieve them?
- What are the constraints on service delivery?
- Have you set a quality standard?
- How do you know you are delivering quality as well as quantity?
- How do you know there is demand for your activities/services?
- Are the services meeting the demand?
- Are there any available external statistics that could be useful in tracking your own results against (e.g. police records, health records, Local Authority reports, Office of National Stats)?
- What are the current systems for collecting and managing information?
- Would you describe your organisation's culture as one where feedback and learning is encouraged?
- Are you able to track, analyse and compare (over a time period) key metrics through your current system?
- Is the information that is being collected being used for useful purposes or is it redundant?
- How many members of staff use the information management system on a daily/weekly basis?
- How are you using what you learn to improve what you do?
- Does your learning feed into how you revise your strategy and activities?
- What are the unintended consequences of your work – both positive and negative?

Step 3 continues overleaf

STEP 3

Check:

- [ ] Do you have a date fixed for the next session?
- [ ] Provide the volunteer with any additional information that they request to review
- [ ] The volunteer will email an agenda for the next session which the CEO will need to agree

NOTES

Homework for the organisation:

1 Brief the chosen trustee who is to attend the next session.

2 Review existing tools to see which ones could work for your organisation (you can refer to Impact Measurement Tools listed in Part Three).

3 Are there any available statistics that could be useful in demonstrating/tracking results? E.g. police or local authority reports.

4 Can you look at similar organisations to see what they measure? Can you improve on this? Have you had feedback from your funders?

5 Draft a version of the organisation's key measurements to discuss and share at the next meeting. It is important to think about the different audiences (board, donors, staff and beneficiaries).

6 Send the volunteer your draft metrics in advance of the meeting.

Homework for the volunteer:

1 Email the CEO a summary of key points and actions from the meeting, copying in the volunteer manager.

2 Confirm the next meeting and propose an agenda for the next meeting.

3 Review existing tools to see which ones could work for the organisation (please refer to Impact Measurement Tools listed in Part Three).

4 Draft a version of the organisation's key measurements to discuss and share at the next meeting.

STEP 4

Identifying measures and setting an action plan

During this session, the CEO and a designated trustee work with the volunteer to define the organisation's key measurements and how best to put these to use. Together you discuss the draft measurements which have been produced and which ones might be best for the organisation to focus on implementing. You should explore and decide upon what information is relevant to communicate to external audiences and what is used for internal management.

Part of the purpose of the meeting is to ensure that the trustee representing the board understands and values the process and makes the decision on what metrics should be regularly reported to the board at trustee meetings. The trustee involved needs to be inspired to become the champion at board level.

This marks the end of the main contact period between the volunteer and organisation.

Check:

- ☐ You have agreed an implementation outline with the set of performance metrics to be adopted (or tested).
- ☐ You have agreed how data will be gathered.
- ☐ You have agreed how often data will be analysed.
- ☐ You have agreed how data will be reported.

Questions that the volunteer might ask to facilitate this discussion:

- What would you like to be able to report as the organisation's headline achievements?
- Can you divide key measurements into outputs and outcomes?
- What are the key measurements to help management?
- What are the key measurements to report externally?
- How often does the board meet?
- What results are reported to the board?
- Do the trustees have full knowledge of the delivery of the activities/services?
- How will you communicate what you achieve and what new information will this include?
- How are the results used for the annual report?
- How will you communicate your findings from this process to the rest of the staff and board?
- Do you have quality standards that can be communicated?
- Do you have a system for keeping all levels of staff informed on the organisation's progress and performance?

Step 4 continues overleaf

STEP 4

Homework for the organisation:

1 Update your team and board on the progress of the project. The trustee might like to inform the other trustees on the project or it might be worth discussing it at the next board meeting in order to confirm what metrics could be provided at trustee meetings going forward.

2 Work on finalising the implementation plan which you can send to your volunteer to review. Please also share this with your volunteer manager.

3 It might be helpful to establish long-term champions in the executive team and board to take responsibility for overseeing the organisation's focus on measurement and results. It is often worth investing the time to work with staff so all levels value the use of information as a benefit to their work.

Volunteer homework:

1 Email the CEO a summary of key points from the meeting and the defined measurements that the CEO has decided to implement going forward. Please remember to copy in the project officer.

2 Review and advise the CEO on the implementation plan which they might choose to send to you.

3 Plan a follow up meeting for 6–9 months time.

4 Offer to review their first new format report, if the organisation would find it useful.

5 Remember to debrief with the volunteer manager to gather your feedback and learning. We also need to learn how to improve and create a better programme for future users.

6 Let us know if you would like to be matched with another organisation.

NOTES

STEP 5

Implementation

It is now up the CEO to put the plan into action and ensure that impact measurement is embedded within the organisation.

Impact measurement should be a continuous process. There will always be opportunities to improve performance and provide a better quality service to an increased number of beneficiaries. Now that the programme has ended, how will the organisation ensure that impact measurement stays embedded in the organisation?

How will the organisation communicate the impact and difference the organisation is making to its varied audiences (funders, beneficiaries, general public)?

How often will the organisation plan to revisit the proposed framework and review outputs, outcomes and indicators? Are the appropriate evaluation tools in place?

In Part Three, we have included links to organisations, publications and tools that can help you on your journey.

STEP 6

Review

The volunteer will check in with the CEO after a few months to review and evaluate the progress being made with the implementation plan. The CEO can discuss problems that have arisen in the course of the implementation and areas which might need refining.

Both the volunteer and CEO are encouraged to provide any feedback or suggested improvements to the volunteer manager.

Do you know any organisations or volunteers that would benefit from taking part in Measuring the Good?

We would like to help as many organisations as possible across the UK access practical assistance on measuring their social impact.

We would be grateful if you could share your experience with others and help us spread the word.

PART 3 FURTHER RESOURCES

IMPACT MEASUREMENT TOOLS

Here are links to a number of tools and resources that can help with the learning process on measurement. You may wish to mix and match the use of these while going through the Measuring the Good process.

GENERAL

Planning triangle (NCVO Charities Evaluation Services)
A visual tool to help organisations identify their aims and objectives and the outcomes they want to achieve. The triangle is a planning tool for presenting what you are going to do, why you are doing it and what you hope to achieve by doing it.

Measuring Up! (Inspiring Impact)
A step-by-step self-assessment tool that allows you to review and improve your organisation's impact practice. Measuring Up! has been designed specifically for charitable organisations and social enterprises, regardless of size, sector or budget.

Inspiring Impact Hub (Inspiring Impact)
A one-stop shop for impact resources and tools. It pulls together the widest possible range of resources relevant to improving impact practice, and enables users to search and filter results according to their needs.

Driving Impact: helping charities transform the lives of disadvantaged young people (Impetus PEF)
A guide for funders, commissioners and charities to deliver impactful programmes for young people.

The Self Assessment Tool (Social Value UK)
An online tool to help users judge how close their evaluation practices are to best practice. The tool is comprised of a seven-stage questionnaire, showing results as a spider chart illustrating areas of strength and for improvement.

Impact Support (Access Impact Management Programme)
Practical information for charities and social enterprises with downloadable templates and useful questions. The site is divided into 3 areas: Planning; Data; Culture.

How to develop a monitoring and evaluation framework (NCVO Knowhow Nonprofit)
Tips to develop a monitoring and evaluation framework, with tools and examples.

Proving and Improving (New Economics Foundation)
A quality and impact toolkit for charities, voluntary organisations and social enterprise.

Standards of Evidence (Nesta)
An approach that balances need for evidence with innovation.

Practical Tools Platform to trigger and support social innovation (DIY Development Impact & You)
A toolkit on how to invent, adopt or adapt ideas that can deliver better results.

EVALUATION

Plan and manage an evaluation (Better Evaluation)
A helpful guide on how to plan and manage an internal or external evaluation.

Costing an evaluation (NCVO Charities Evaluation Services)
Guidance to help with commissioning an external evaluation

Small Slices of a Bigger Pie (New Economics Foundation)
A report for organisations to help understand and explore ways to measure attribution.

Mixed Methods In Impact Evaluation (Better Evaluation)
A guide that outlines the elements of a mixed methods approach with particular reference to how it can be used in an impact evaluation.

COMMUNICATING AND REPORTING IMPACT

The Principles Of Good Impact Reporting (New Philanthropy Capital)
A guide to help you think about how to communicate impact, and what you should communicate.

Talking about Results (New Philanthropy Capital)
A report on how charities in the UK talk about impact with advice on good impact reporting.

One Page Impact Reports (Endzone and Intentionality)
An easy way for social enterprises and charities to create and share well designed, compelling 'One Page Impact Reports'.

INDICATORS + DATA COLLECTION

Outcomes Matrix Tool (Big Society Capital)
A tool to help organisations to plan and measure their social impact. It includes outcomes and measures for nine outcome areas and 15 beneficiary groups.

Outcomes Star (Triangle)
A tool to measure and support progress for service users towards self-reliance or other goals. The Stars are designed to be completed collaboratively as an integral part of keywork. They are sector wide tools – different versions of the Star include homelessness, mental health and young people.

A Guide to Questionnaire Design
This guidance provides general advice around using questionnaires and specific design advice.

Global Value Exchange
Open source, crowdsourced data resource to share outcomes and indicators.

UK Government Statistics
For accessing data to benchmark outcomes.

Software and IT tools to help with evidence collection and use (Clinks / New Philanthropy Capital)
Tools to support data collection and management

Measurement Instrument Database for the Social Sciences (MIDSS)
A repository for instruments that are used to collect data from across the social sciences.

IRIS Metrics (Global Impact Investing Network)
Bank of metrics designed to measure the social, environmental and financial performance of an investment.

KNOWLEDGE BUILDING & TRAINING

KNOWLEDGE BUILDING & TRAINING OPPORTUNITIES

The following organisations offer membership opportunities, organise useful events and courses, and/or provide consultancy services on a range of topics linked to impact measurement and social value. Combining the attendance of courses with the Measuring the Good programme can only assist in the learning process. The courses and consultancy fees vary in price. Please visit the websites for further information.

Centre for Youth Impact
http://www.youthimpact.uk/

Charities Evaluation Services
https://www.ncvo.org.uk/training-and-events

Economic Change
https://www.economicchange.co.uk/

nef consulting (New Economics Foundation)
http://www.nefconsulting.com/training-capacity-building/

New Philanthropy Capital
http://www.thinknpc.org/events/

Pro Bono Economics
https://www.probonoeconomics.com/

Social Audit Network
http://www.socialauditnetwork.org.uk/events-training

Small Charities Coalition
http://www.smallcharities.org.uk/upcoming-events/

Social Value UK
http://socialvalueuk.org/training

The FSI (The Foundation for Social Improvement)
https://www.thefsi.org/services/training/

GLOSSARY OF TERMS

Activities: The product, services, programmes, interventions or projects that an organisation delivers to create its outputs and outcomes and achieve its aims.

Aims: Describe why a organisation exists and the difference it wants to make. They can be overall or specific.

Benchmark: Something that serves as a standard by which other outputs or outcomes maybe measured or judged.

Data collection & analysis: The techniques used to gather and interpret information about activities.

Evaluation and monitoring: The continuous process of using systematically collected data to examine and judge the success of the delivery of an activity to the intended beneficiaries.

Goals: Broad, long-term aims and general intentions that you want to accomplish.

Impact/outcomes: These are the results and effects of activities and the differences that the activities have made to beneficiaries. These changes may be hard or soft, intended or unintended, positive or negative. The term 'impact' is often used to represent longer-term results that have a wider effect on the community or environment. Intermediate outcomes are what need to happen to bring about the end, desired result.

Impact measurement: The process of trying to find out whether an organisation is doing something that provides a real benefit to other people or the environment. This process includes everything from gathering data to analysing data to demonstrating findings.

Indicators/KPIs/metrics: A characteristic or attribute that can be measured to assess an activity or/and an intervention in terms of its outputs and outcomes. Output indicators are normally straightforward. Outcome indicators may be more difficult to derive. Indicators can be either quantitative or qualitative.

Inputs: The resources that contribute to a programme or activity, including income, staff, volunteers and equipment.

Milestones/targets: A measurement of progress towards an output or outcome.

Mission: The overall, fundamental purpose of the organisation. It describes what you do, for whom you do it and the benefit.

Objectives: Concrete, tangible and often measurable targets that the organisation is striving to achieve. They are defined goals.

Outputs: The immediate results of your activities – the processes, goods and services that it produces.

Qualitative information: Information about what you do, achieve or provide that tells you the nature of the thing you are doing, providing or achieving.

Quantitative information: Information about what you do, achieve or provide that tells you how many, how long or how often you have done it, achieved it or provided it.

Theory of change / logic model: A tool that helps to explain how an intervention is understood to contribute to a chain of results that produce the intended or actual outcomes/impact.

Vision: Describes the direction you are heading in. It describes how the future will look if the organisation achieves its ultimate aims.

PART 4

IMPACT AND REACH OF THE PROGRAMME

Impact data

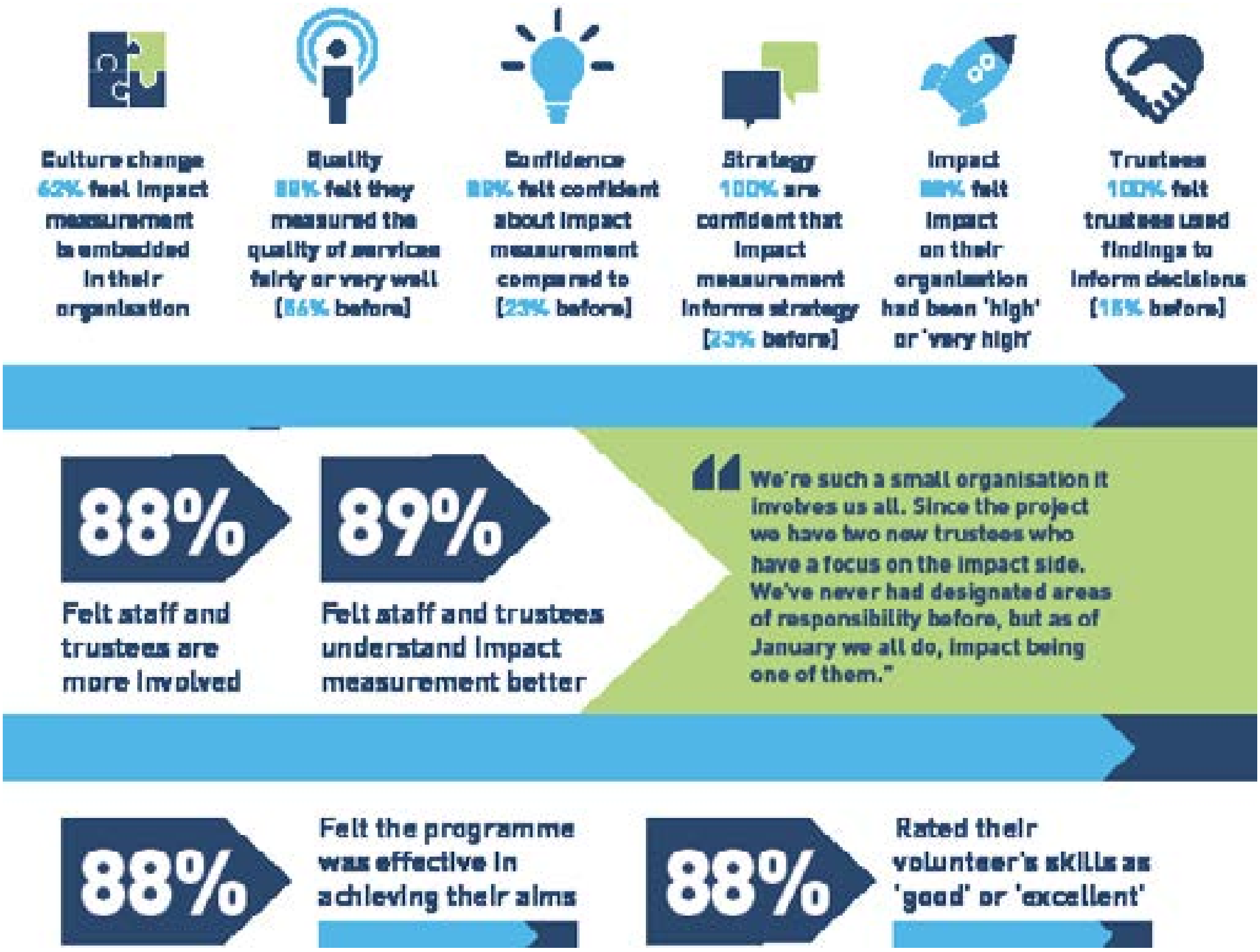
Coalition for Efficiency and Volunteering Matters work together to measure the impact of the Measuring the Good programme delivered by ourselves and our partners in order to maintain a high quality standard.

We record the number and type of organisations that complete the programme successfully.

The organisations and volunteers taking part complete a survey before Step 1 begins and at the end of Step 4. A further survey is carried out to measure the results for the organisation after a 6–9 month period. In addition, there are periodic independent evaluations of the programme.

Between 2013 and 2018 the programme enabled 114 organisations[5] to improve their impact measurement through Measuring the Good.

Figure 1: Organisation highlights



5 A cohort of different organisations participated in the pilot programme from 2012–13 when it was known as The Practical Approach and managed solely by the Coalition for Efficiency.

Figure 2: Employee highlights

100%

of volunteers felt that their objectives had been met through the programme e.g. benefitting a charity or organisation; applying their skills in a different environment

75%

felt that the skills they had developed/improved would be useful in their professional work

100%

felt supported by Volunteering Matters and the organisation they were matched to

100%

felt the programme met their expectations or exceeded them

"Having learned more about the charity sector, I feel I shall be able to use my skills more confidently going forward."

"The most important thing the project has given me is the confidence to use my skills in different situations. I'm very proud to have been part of this project, thank you for selecting me."

"Operating in an environment with limited resources helped us to focus/ prioritise from the outset enhancing my skills."

...the number of hours spent on average by volunteers in meetings with the organisation, or preparing for them

20–22

CASE STUDIES

CASE STUDY 1:

SIFA Fireside

Location: Birmingham

Turnover: £986,000 (2014)

Number of staff: 45

SIFA Fireside was formed in 2007 through the merger of two established Birmingham charities. The organisation works five days a week with those experiencing homelessness or who are vulnerably-housed. They run a daily drop-in service and provide food and showers for their clients.

The organisation's perspective:

"Due to changes in funding and the landscape in which we operate SIFA Fireside recognised that we needed to re-define our purpose and aims. Our volunteer, Nikki-Dee, met with us on multiple occasions providing guidance, tools and training to support us to identify and define our key values, services and benefits. It was exactly what we needed. With so much change, varying contracts and seemingly varied goals and outcomes this enabled us to see the commonalities and categorise the work we are doing.

Nikki-Dee was really supportive and worked at the pace we needed, she tailored everything to how our organisation functions and was realistic about how much we could carry forward. The time spent in these discussions and implementing the plans has really been worthwhile. The benefits of working with Nikki-Dee have been significant. We now have a clear vision of the benefits we provide and the impact we have as an organisation, and how we plan to measure, demonstrate and communicate these to stakeholders, funders, members of the public and service users. This supports us to build our resilience and to ensure that we don't 'dilute' our offer and has been used to inform our Business Plan updates and Annual Impact Reports."

The volunteer's perspective:

"I offered my time and support to SIFA Fireside pro-bono as I have worked with them on projects previously and think they offer a really valuable service to some of the most disadvantaged people across the city. I have met with their service users and they have told me directly how much SIFA Fireside means to them and the difference it made to them having somewhere they could go, somewhere they could get access to the basic things most of us take for granted each day such as a shower, a hot meal, healthcare and often just another person to speak to who understands and can offer support, advice and guidance, without judgement.

When I heard they were looking for help with impact measurement through 'Measuring the Good', I was quick to offer. Throughout the process SIFA Fireside were focussed, clear on their objectives and willing to commit real time and resources to achieving their goals. The project had support from the whole organisation and team, who were all dedicated, passionate and inspiring. I also learned more about all the other things they do to support and engage with clients, including training and employment support and health and lifestyle activities. There is a lot more to the service than the drop-in centre most of us are probably familiar with. I believe they met their initial objectives and that this work will continue to evolve, and I plan on continuing my involvement with SIFA Fireside."

CASE STUDY 2:

Bipolar UK

Location: London

Turnover £750,000 (2013)

Number of staff: 12

Bipolar UK is dedicated to supporting individuals with bipolar disorder, their families, carers and loved ones. They provide a range of services to enable people affected by bipolar and associated illnesses to take control of their lives. They also work in partnership with research organisations and campaign for new developments to tackle key issues.

The organisation's perspective:

"As a small charity facing unprecedented service demand, the crucial development work to improve our impact reporting had been squeezed over the past year. As such we had not been able to effectively demonstrate the impact of our services.

It was immensely helpful to discuss the challenges we faced with someone of Catherine's [volunteer Bipolar UK was matched with] calibre who was new to the organisation and indeed to the illness we are supporting. She helped us look at what we should be doing in terms of impact reporting, particularly with regard to our own expectations. We developed a survey which to allow the charity for the first time in its history to have an understanding of how our service users are accessing different services, their satisfaction (or indeed otherwise) and a greater understanding of our impact. This survey could then feed through to important Strategic Board discussions and operational decisions.

At the end of the day, we are taking one step at a time. We have not developed an all-singing, all-dancing impact framework but we have developed an important first step to what will work for us."

The volunteer's perspective:

"It seemed to me to be a small, but very busy organisation with passionate and hard-working staff, and high expectations from service users and Trustees. I learned a lot in a short space of time, both about bipolar itself, and about the specific challenges faced by Bipolar UK in supporting those affected by the condition. This was interesting and enlightening. It was also nice to have a change from my day job, and to focus my attention on something completely different. Simply being an outsider and bringing a new perspective to the challenges of impact measurement was, I think, helpful in itself. The fact that Suzanne and colleagues were open to new ideas, and were prepared to devote time and energy to our discussions helped the process enormously. I think (hope) my contribution helped Bipolar UK to look more holistically at the range of services they provide to their users, and to proceed with impact measurement accordingly. I also hope I helped them break through the 'too difficult' barrier to come up with a realistic and achievable approach to gathering user feedback. This was a great (and unique) project. I'm really glad I stumbled upon it!"

CASE STUDIES

CASE STUDY 3:

Help the Hospices

Location:	London
Turnover	£6 million (2013)
Number of staff:	58

Help the Hospices want the very best care for everyone facing the end of life. They support those who work in or volunteer to support hospice care.

The organisation's perspective:

"The program helped us to understand what we thought our theory of change was. This has helped us to focus our activities for future years and understand the types of things we could practically measure which would enable us to evaluate our impact. We learnt that it is possible for a charity that doesn't work directly with its ultimate beneficiaries to measure its impact. Because our business plan is very detailed, we agreed that it would be more useful to develop impact measures around our three strategic objectives. The project has already had a big impact on our business plan for next year. We have already developed our first impact report, which was very well received by our members at our AGM. We will be implementing a range of new impact measures over the coming year, and building them into an ongoing cycle of reporting, which will in turn influence what we do in future. We achieved what we wanted in terms of impact reporting, and the program has helped us understand what our key priorities should be."

The volunteer's perspective:

"The guidance provided at the beginning of the program was very useful in providing structure and expectations. I approached the project systematically, ensuring each step delivered useable output that would culminate in the agreed objective (getting to a list of agreed Outcomes and Measures). I was impressed with the enthusiasm, commitment and professionalism of the Leadership Team, and admire their drive to deliver more and better in the face of many challenges.

I found the experience rewarding as the Team seemed to genuinely enjoy and engage with the process. The project gave me an opportunity to put my daily work in perspective, and to apply my skills to a different type of 'client engagement' without the usual commercial constraints. I hope the charity has gained structure and sustained momentum."

MEASURING THE GOOD COMMUNITY

The following organisations have taken part in the Measuring the Good programme between 2013 and 2015:

Afford UK

Bail for Immigration Detainees

Bipolar UK

Birmingham and Solihull Women's Aid

Camden Carers Centre

Cara Trust

Charity Comms

Child Poverty Action Group

City and Hackney Mind

City Philanthropy

Desta Consortium

Finsbury Park Homeless Families Project

Forest Recycling

Hammersmith and Fulham CAB

Help the Hospices

Holborn Community Association

Holloway Neighbourhood Group

Home-Start Camden

Kensington and Chelsea Foundation

London Skills Academy

MRS - Independent Living Services

National Council for Voluntary Youth Services (NCVYS)

Nightline Association

Oakleaf

One North East

Peasholme Charity

Pembroke College Mission

People in Aid

Queens Crescent Community Association

Scarabeus Theatre

SIFA Fireside

South London Scouts

Stuart Low Trust

Swiss Cottage Community Association

The Migrant and Refugee Communities Forum

Voluntary Action Islington

Volunteer Centre Camden

Walton Charity

Wandsworth Oasis

Whittington Park Community Association

Wiltshire Community Foundation

Other organisations underwent the programme when it was formerly known as The Practical Approach in 2012, including:

Bliss

Commonweal Housing Ltd

The Mission to Seafarers

Cardinal Hume Centre

Commonweal Housing

Engineering UK

Help Musicians UK

Field Lane

Children in Crisis

British Exploring Society

Partners of Prisoners

Harrogate Skills For Living Centre

FEEDBACK

Feedback from organisations who participated in the programme

"We developed and tested a Theory of Change which allowed us to reflect on the impact of our work on youth organisations and young people. It's been good to develop that logic model which allowed us to explain our desired impact as a second tier organisation."

"This approach gave us the opportunity to reappraise our current status to measuring the impact of our programmes and to learn from others."

"We felt very well supported throughout the process. Our volunteer very quickly understood our charity and its current challenges and helped us really think about every aspect of what we do and what we could measure to evidence our benefit."

"We would not have been able to complete the second stage of our recent funding bid without having gone through this process as the entire bid was about outputs and outcomes and measurements - all things we were able to complete with the knowledge gained from this programme."

"Knowledge of our impact has become an essential guide in our strategic development."

Feedback from volunteers who participated in the programme

"Rewarding, intellectually stimulating and challenging. It tested my interpersonal skills and my business knowledge… and gave me exposure to strategic leadership and non-executive management"

"This approach provides the volunteer with an opportunity to make a real difference to an organisation. You are effectively assisting the CEO and the trustees on managing their business by identifying the performance indicators and helping them focus on their results. As part of the exercise, you will explore and examine their mission, strategy and how the charity is organised and governed. You are performing a short consulting project for a client who actually wants and values your help and in an organisation that is itself helping others. In simple terms it is very rewarding as well as being intellectually stimulating. If you are new to working with charities then it provides a very useful insight into the sector and how it works, and hopefully will encourage you to become more involved."

"As well as the personal reward I found that I developed a deeper perspective in my knowledge skills as this challenged some of my previous perceptions and drew on my softer skills to understand the drivers in the organisation."

APPENDIX

ABOUT THE PARTNERS

CfE's mission is to work with others to seek out and implement ways to influence charities and social enterprises to run themselves more efficiently and effectively, without sacrificing quality.

We are a small self-funded not-for-profit organisation.

Address:
2 Temple Place
London
WC2R 3BD

Email: info@cfefficiency.org.uk
cfefficiency.org.uk

Volunteering Matters is a national charity leading UK volunteering in policy and practice. Volunteering Matter's mission is to enable people to take an active role in their communities.

Our vision is of a society where everyone can participate to build strong and inclusive communities.

Address:
Volunteering Matters
The Levy Centre
18–24 Lower Clapton Road
London
E5 0PD

Main switchboard: 020 3780 5870
volunteeringmatters.org.uk

Other Measuring the Good partners

The programme was initially a joint initiative between Coalition for Efficiency and Volunteering Matters.

As of 2018, we are partnering with other organisations including grant-makers and volunteer managers who are either taking on the delivery of the programme themselves or outsourcing the delivery to Volunteering Matters so we can reach a larger number of organisations in the UK.

Please contact us if you are interested in finding out how to become a Measuring the Good delivery partner.

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