

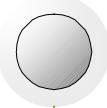
# GETTING STARTED IN SOCIAL IMPACT MEASUREMENT

A guide to choosing  
how to measure social impact



September 2010





## ORIGIN OF THE GUIDE

Between January and March 2010, a partnership consisting of The Guild, Mutual Advantage, Third Sector Research Centre and Social Enterprise East of England (SEEE) carried out a piece of work for the East of England Development Agency (EEDA) on social impact measurement, procurement and social enterprise development.

One of the key findings of our social impact measurement research was that the challenge for organisations is knowing what method is suitable for them. While there are large, detailed and comprehensive guides such as NEF's prove and improve ([www.proveandimprove.org](http://www.proveandimprove.org)) database already out there, we wanted to provide a plain English, concise guide to help people get their toe in the door of social impact measurement.

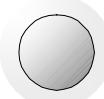
Through a Knowledge Transfer Partnership with Middlesex University's Centre for Enterprise and Economic Development Research (CEEDR), The Guild engaged Hélène Rinaldo to develop the guide. She started from the basis of feedback from 40 third sector organisations from the original research and went on to trial this guide with 17 more third sector organisations. By working from what these organisations want to know and how they want that information presented, she wrote this guide.

## AUTHORSHIP AND ACKNOWLEDGEMENTS

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ALL LINKS AND INFORMATION CORRECT AS OF SEPTEMBER 2010



# INTRODUCTION

Since the 1990s, voluntary and community organisations and social enterprises have shown mounting interest in determining and publicising the social impact they create. Social impact measurement is gaining momentum, both by empowering organisations to talk about what they actually do and achieve, but also as a response to greater calls for transparency and accountability where public or charitable money is involved.

## **Why did we write this guide?**

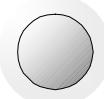
Social impact measurement is gaining in currency. It is a challenging time: voluntary and community organisations have more to do for communities with less money to go round. Social impact measurement has the power to make an organisation even better at serving its community and give it a greater chance of winning new contracts and grants. During our social impact measurement research for EEDA (see [Origin](#) on the inside front page for more information) we found that there is a wide variety of tools and methods available, but it is not always easy for people working in small and medium-sized organisations to find out what methods are out there and which ones could work for them.

## **Who is this guide for?**

This guide is for people working or volunteering in small and medium-sized organisations who are new (or fairly new) to social impact measurement. It will enable you to select a method or tool to fit your organisation's needs. It can also be useful to funders, investors and those involved in the procurement process to help you to write appropriate social impact measurement into the commissioning process.

## **How were the methods selected?**

The list of tools and methods was established with the affordability and resources of small to medium-sized organisations in mind. It is not a comprehensive list - the guide was intentionally kept small and concise. The tools were chosen because they are proven and well-reviewed. They are for general use as opposed to specific projects. They help you to provide information on your organisation and your service users. This guide is a starting point, at the end you will find links to more comprehensive and all-encompassing lists of tools and guides and individual tool and method websites.



# USING THE GUIDE

This guide is divided into three parts.

Each part has been developed to take you a step further toward understanding and making choices about social impact measurement.

You can follow each section in order or go to the final section to familiarise yourself with the available tools before making your choices.

## BACKGROUND

This section will explain what social impact measurement is and introduce you to some of the common terms used to describe measurement methods and quality systems.

## MAKING CHOICES

This section consists of questions and statements that help you think about the many ways you can use social impact measurement. Answering the questions will also help you to find out how ready you are to start measuring impact.

This section is in three parts:

- Questions and statements
- Your list of options
- Criteria table

## FINDING OUT MORE

This section is useful if you want to know a bit more about the tools and methods appearing in this guide. It also gives you a list of resources and websites you can go to for further information.



# BACKGROUND

This section will explain what social impact measurement is and introduce you to some of the common terms used to describe measurement methods and quality systems.



# SOCIAL IMPACT MEASUREMENT

## What is social impact measurement?

According to a Social Enterprise East of England (SEE) booklet on 'Measuring making a difference', social impact measurement is the process of providing 'evidence that your organisation - whether it is a social enterprise, voluntary or community organisation or traditional business - is doing something that provides a real and tangible benefit to other people or the environment.' (SEE 2009)

## Why measure impact?

People who work in voluntary and community organisations and social enterprises every day may be able to see with their own eyes the real and tangible benefits created by the work their organisation carries out. But there are two reasons why it might be a good idea to try to measure the extent of this social impact in more detail:

- a) A move towards measuring social impact can help you to build on the things you are doing well and to learn from the challenges you have faced. This feeds into good practice and means the organisation will learn and improve.
- b) There are funding and contract opportunities out there for voluntary and community organisations and social enterprises, but the people who buy in services or provide funding need to know that working with your organisation will provide a social benefit. Just as financial accounts prove the viability of a business, social impact measurement can show a robust and rigorous approach to providing community or environmental benefits.

## Why are there so many tools and methods to choose from?

One of the key findings of our social impact measurement research (see [Origin](#) on page 2 for more information) was that the challenge for organisations is knowing what method is suitable for them.

The simple answer to why there are so many tools and methods available is that there is no one option that is suitable for everyone. The way you measure impact will depend on the size, capacity, activities and focus of your organisation. This guide will help you to think about the factors you need to take into consideration when choosing how to measure impact.

There are also distinct types of tool that serve different purposes within an organisation. The next two pages explain the types of tool available and then show how these relate to each other.



## TALKING ABOUT TOOLS AND METHODS – SOME COMMON TERMS

**What is an impact measurement framework?** The activities an organisation carries out can have long-term effects on beneficiaries, beneficiaries' families and the broader community. Social impact measurement seeks to identify and quantify this impact. An impact measurement framework provides the structure for assessing all aspects of an organisation's impact. Within that framework, more than one tool or method can be used to collect information. The information needed to inform social impact measurement may include data from your monitoring and evaluation systems, quality systems, impact tools and toolkits and outcome-focused tools.

### **What is the difference between outcomes and outputs?**

*Outputs* are easy to count because there is a clear point in time when they have either happened or not. For example, training participants have either completed a course or not; five hundred awareness-raising leaflets have been mailed out, or they haven't. *Outcomes* go deeper and describe progress over time. The desired outcome of completing training is the improved knowledge and skills participants take away that will make a difference to their lives and the lives of others. The desired outcome of mailing out leaflets is that by reading them people will become more aware of the issue at hand. There has been a move towards measuring outcomes as well as outputs to give a clearer picture of what value organisations and projects create.

### **What are outcome tools?**

Outcome tools are used to measure and record the progress a beneficiary makes and pinpoint areas of future need. They make it possible to assess the changes made in a consistent and standardised way. Outcome tools provide information that can be drawn together to give an overview of the change achieved by a service or a project. They are therefore a key part of the impact measurement process.

### **What are quality management systems?**

Quality management systems, often shortened to 'quality systems', are about processes. They focus on how things are done. They look at how an organisation is run, how staff are managed and customer care. A set of standards are defined and used to gauge areas for improvement. An organisation can assess itself or can buy in the services of an external assessor. External assessment is often needed to gain a quality mark. Some quality systems focus on how activities are carried out, others also require evidence about the results of these activities. This evidence requirement would have the additional benefit of providing information for an impact measurement.

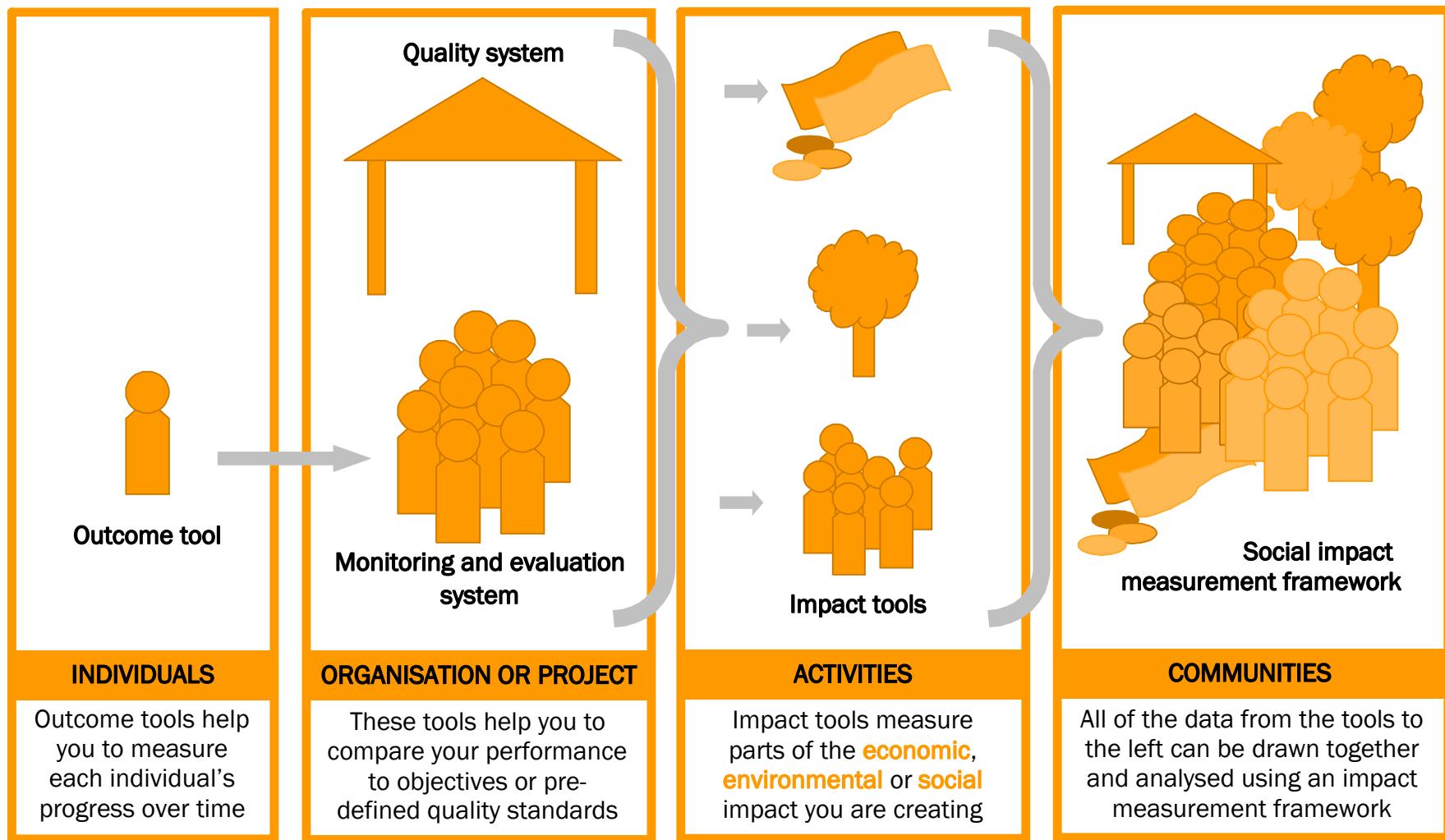
### **What are monitoring and evaluation systems?**

Monitoring is about collecting information in a planned and regular way. Evaluation is about using that information to gauge how well the project is doing. Monitoring and evaluation systems will tell you what information to collect, when to collect it and who will collect it. This information can provide the proof that a quality standard has been met or support social impact measurement.



## HOW TOOLS AND METHODS RELATE TO EACH OTHER

One of the challenges people face when choosing how to measure impact is understanding how different tools and methods relate to each other and why they might want to pick and mix a selection of tools for distinct purposes. The diagram below sets out how information collected using various tools can be brought together under a social impact measurement framework.





# MAKING CHOICES

This section consists of questions and statements. They will help you to clarify your needs and readiness. The answers to the questions will also show you how different methods and tools can benefit your organisation.

Here are some acronyms that you will find used frequently in the next section:

Acronyms	Definition
<b>DTA</b>	Development Trusts Association
<b>EFQM</b>	European Foundation for Quality Management Association
<b>Emas</b>	Eco-management and Audit Scheme
<b>LM3</b>	Local Multiplier 3
<b>PQASSO</b>	Practical Quality Assurance System for Small Organisations
<b>QS</b>	Quality System
<b>SIMPLE</b>	Social IMPact measurement for Local Economies
<b>SAA</b>	Social Accounting and Audit
<b>SIM</b>	Social Impact Measurement
<b>SOUL Record™</b>	Soft Outcomes Universal Learning
<b>SROI</b>	Social Return on Investment



## HOW TO USE THIS SECTION

As you saw in the [previous section](#), there is no one tool that is suitable for every organisation or every purpose.

The step by step instructions below show you how to use this section to create a longlist of potentially useful tools, based on your organisation's priorities and focus. The next guided step is to check the names on your list against factors like time, cost and demand on staff and to rule out tools that are not appropriate for your circumstances. The guide then lets you know where to go for more information to help you make one or more final choices.

This process requires no prior knowledge of social impact measurement, although to make best use of this section it is a good idea to read through the terms and definitions set out on [pages 6 to 8](#).

- Step 1 Print out and have to hand a copy of the worksheet *Your list of options* ([page 11](#)). Alternatively, download and open the electronic version of the worksheet for completion on screen.
- Step 2 Read the *Summary of questions and statements* on [page 13](#). On the worksheet, tick the statements that relate to your situation.
- Step 3 There is a page number next to each box you have ticked on the worksheet. Go to the page number next to your first tick and read the question and statement in full. All of the tools and methods for you to consider are in **bold**. Each time you come across the name of a tool in the text that could be useful to you, write it down on the *Your list of options* worksheet. Don't worry whether you know much about the tools being described at this point – you'll be able to refine your choices later using the *Criteria tables* and the information we provide in the section on [Finding out more](#). Read through all the questions and statements you have ticked in turn, noting tools and methods on the worksheet.
- Step 4 On the worksheet, you now have a list of all the tools and methods you wrote down in step 3. The next step is to reduce the list to the tools and methods most appropriate to you. To help you, the *Criteria Tables* on [pages 21 to 23](#) give you an indication of the resources needed to use each method. Working through your list, check each of the tools and methods you selected in step 3 against the criteria that matter to you. Place ✓, ? or ✗ next to the option on your list as you decide.
- Step 5 To make a final decision, find out more about the options you have marked with ? or ✓ by looking them up in the final section: [Finding out more](#). There are also links to the individual tool websites which provide more information.



## YOUR LIST OF OPTIONS WORKSHEET

**Step 1** is to print out, copy or download the electronic version of this worksheet. The instructions on **page 10** set out how to fill in the table below.

Step	2	3	4
Page	Read?	Make a long list of tools	Choose
	✓, ? or ✗	Each time you come across <b>the name of a useful tool</b> , write it down here	✓, ? or ✗
<b>A) Your motivation</b>			
A.1 Effective	p14		
A.2 Efficient	p14		
A.3 Taking stock	p14		
A.4 Publicising	p15		
A.5 Quality Mark	p15		
A.6 Feedback	p16		
A.7 Dictated tool	p16		
<b>B) Your readiness</b>			
B.1 Change	p17		
B.2 Measure	p17		
<b>C) Your capacity</b>			
C.1 Small	p18		
C.2 Little time	p18		
C.3 Experience	p18		
<b>D) Your impact</b>			
D.1 Environment	p19		
D.2 Economic	p19		
D.3 All three	p19		
D.4 Volunteers	p19		



This is a **BLANK SIDE** on the reverse of the *Your list of options* worksheet, so that you can print out, detach and write in the table without having to refer to questions on the other side.

See the next page for the start of the questions and statements →

# WHICH SOCIAL IMPACT METHOD OR TOOL?

## A SUMMARY OF THE QUESTIONS AND STATEMENTS

The summary of questions and statements below leads you through the key issues you will need to consider when choosing a social impact method or tool.

On **pages 14 to 19** you will find out which method or tool to use if the statements apply to you. The names of these are marked in **bold**. Each time you come across the name of a tool that could be useful to you, write it down on the *Your list of options* worksheet.

### A. Your motivation

What is driving your interest in social impact measurement?

1. The desire to make sure our organisation is effective
2. The desire to make sure our organisation is efficient
3. We want to take stock before implementing change
4. We want people to know who we are, what we do and communicate the value we create
5. We need a quality mark
6. The funder has asked for an evaluation or evidence to feed back how our organisation / project has performed
7. The funder dictates we use a specific tool, framework or method to measure impact

### B. Your readiness

How ready are you to undertake an impact measurement?

1. We know what the changes we want to create will look like
2. We measure our success against the change we planned

### C. Your capacity

What is your capacity to implement a social impact measurement?

1. We are small with limited resources in time, money and staff and entirely new to social impact measurement
2. We want to conduct a social impact measurement, but all our staff are already pressed for time
3. We are confident using the techniques surrounding impact measurement

### D. Your impact

What type of impact do you want to assess?

1. We want to know our impact on the environment
2. We want to know about our wider economic impact
3. We want a comprehensive overview of our impact on the environment, the economy and society
4. We want to know the impact of volunteering

## WHAT IS DRIVING YOUR INTEREST IN SOCIAL IMPACT MEASUREMENT?

### 1. The desire to make sure our organisation is effective

Any evaluation of what you do and how you do it will show your strengths and where you can improve.

- **Community impact mapping** provides a simple introduction if you are starting from scratch
- Consider using tools with an outcomes focus. These tools are used with your client to evaluate and chart their progress and can be aggregated to find out more about the outcomes for all of your beneficiaries:
  - **Outcomes Star** is used when working with vulnerable people.
  - **Soul Record** is used in informal learning and development.
- **SIMPLE** takes you through the process of putting a framework into place to identify, measure and communicate impact (see [page 7](#) for an explanation of social impact measurement frameworks).
- If you already have experience of evaluation or outcome tools:
  - **SAA** presents a flexible framework for accounting for social, environmental and economic impact using existing planning tools.
  - **SROI** can be used to forecast or evaluate a project or organisation's impact and put financial values on some impacts.

### 2. The desire to make sure our organisation is efficient

Making sure processes within your organisation run smoothly is different from measuring impact. You may want to implement a quality system. Quality systems look at how your organisation is run and check performance against a set of standards.

- **Quality First** is for very small organisations with no, 1 or 2 paid staff. A beginner's tool.
- **C3perform** is for beginners.
- **Customer Service Excellence** is about customer satisfaction.
- **PQASSO level 1** is for small to medium organisations.
- **EFQM** sets out European standards used by businesses with experience in using quality systems.

### 3. We want to take stock before implementing change

- **Fit for Purpose** is a straight forward diagnostic tool to help new or developing social enterprises to assess their strengths and identify areas for improvement
- **Social enterprise balanced scorecard** is an internal management tool used to track performance, clarify and articulate objectives
- **Third sector performance dashboard** is used by third sector organisations to monitor progress and report on performance

## WHAT IS DRIVING YOUR INTEREST IN SOCIAL IMPACT MEASUREMENT? (continued)

### 4. We want people to know who we are, what we do and communicate the value we create

Any of the tools you choose using this guide will provide the information you need to communicate to your beneficiaries, trustees and funders. The key issue here is how you use that information. Use the information gathered to announce your successes to the world through publications, articles or newsletters.

Where to look for information:

- Social impact measurement methods: A report is produced at the end of an impact measurement, containing data, quotes and stories.
- Quality standards: The evidence collected to show that you met the standards will show the quality of your organisation.
- Outcome tools: You can tell success stories of service users to publicise your service, making sure you that you get consent before using any story, respecting people's right to privacy.

### 5. We need a quality mark

Sometimes funders want to make sure that the organisation they are funding has a system to both handle the money they provide and to spend it efficiently and effectively. Quality marks can provide proof of good quality management and give funders this assurance.

- If you need external accreditation: people from outside will come in to determine whether or not the organisation has met the standards required by the quality system adopted. A quality mark will be awarded accordingly:
  - **Customer Service Excellence**
  - **PQASSO**
  - **EFQM**
- If you need external assurance but know that it comes at a cost, there are ways to lower the cost using a system of auditing clusters. Auditing clusters are where several organisations come together for peer support and learning, taking it in turns to audit and be audited:
  - **EMAS easy**
  - **SAA**
- If you want assurance that a social impact measurement process has been carried out correctly according to official guiding principles:
  - **SAA**
  - **SROI**

**A**

## WHAT IS DRIVING YOUR INTEREST IN SOCIAL IMPACT MEASUREMENT? (continued)

### 6. The funder has asked for an evaluation or evidence to feed back how our organisation or project has performed

Funders usually give you a set of criteria in the grant application, contract specification or guidance notes to be met as a successful applicant. Make sure you include them as indicators in the project plan, building into the project itself the time and costs associated with evaluation. The cost will then be covered as part of the grant application.

- **SROI** can be used to forecast the impact of a project and identify what should be measured once the project is up and running.
- **Prove It!** was specially designed to manage small and medium-sized projects and evaluate their impact.
- **Outcome Stars** and the **Soul Record** give scales relating to outcomes for each user at the start and at the end of a project. The difference between the two scales show the progress made by the user. Aggregating all the results gives an overall estimation of how the project performed.

### 7. The funder dictates that we use a specific tool, framework or method to measure impact

Read about the tool or method specified by using the **Finding out more** section of this guide and the links provided.

It may be that the cost of using the tool has been built into your grant application or contract. If so you may want to commission the services of a consultant. When commissioning consultants it will serve you well to have a brief setting out what you want from the impact assessment, in line with the core values of your organisation.

Click here to read a Charities Evaluation Service (CES) paper for [Guidance on what to include in an evaluation brief](#).

## HOW READY ARE YOU TO UNDERTAKE AN IMPACT MEASUREMENT?

### 1. We know what the changes we want to create look like

At the core of impact measurement is the relationship between your vision and the activities you carry out to bring about change.

- Revisiting your aims and objectives will give you a snapshot of what your organisation wants to change and how it wants to bring about that change. Clarity over your aims and key underlying assumptions is the basis of good impact measurement.
- Social impact measurement frameworks can help you to think about the overarching change you want to create:
  - **Community Impact Mapping** will help link your organisation and its activities
  - **SAA** will explore in detail the objectives and values of an organisation
  - **SROI** will look at the link between your activities and their results, both intended and unintended.
- Outcome tools look at change at the level of each individual, but aggregated can give a picture of change in a group of beneficiaries:
  - **Outcomes Star** tracks the progress made with vulnerable service users (for example homeless people, drug users, and alcoholics)
  - **Soul Record** traces changes in informal learning and development, both for adults and children.

### 2. We measure our success against the change we planned

Measuring your success is part of monitoring your activities and provides the basis of measurement. Outcomes data is essential to a social impact measurement.

- **SAA** and **SROI** will be easier to implement with less time and resources if a monitoring system is already in place.
- **PQASSO** and **EFQM** are quality systems with information on outcomes.
- **Outcomes Star** and the **Soul Record** can be used for your frontline work and are measuring tools that show progress made.

## WHAT IS YOUR CAPACITY TO IMPLEMENT SOCIAL IMPACT MEASUREMENT?

### 1. We are small with limited resources in time, money and staff and entirely new to social impact measurement

You do not have to do everything at once. Choose an easy to use tool that requires little time or expertise and can be carried out at minimal cost. It will be your first rung on the social impact measurement ladder.

There are partial tools that only look into one area or aspect of your organisation. Using them will build your capacity. They are not mutually exclusive and can be combined. Remember to be realistic about your capacity and time.

You can use:

- **Community impact mapping** for an introduction to impact measurement
- **Ecomapping** for an easy assessment of your environmental impact
- **Prove It!** for its step by step guidance, and participation of the project beneficiaries in evaluating progress
- **Quality First** for very small organisations
- **C3perform** for an organisation to understand its core business

### 2. We want to conduct a social impact measurement ourselves, but all our staff are already pressed for time

Spend a small amount of time to save time: social impact measurement will highlight areas in need of improvement. For example, it may be that there is a service you provide that is not as beneficial as it used to be, that volunteer induction time can be made more efficient or that travelling time can be shortened by clustering activities. Funders are keen to see service users involved in evaluation and impact measurement.

You can use:

- **Community impact mapping** to build your capacity and then progress toward more demanding methods
- **DTI fit for purpose** to diagnose where time can be saved
- **Prove It!** where beneficiaries of a project participate in its evaluation

### 3. We are confident using the techniques surrounding impact measurement

Some methods require a certain level of knowledge and a grasp of techniques like surveys, stakeholders engagement or analysis of the information gathered. Skills can be acquired in stages. Organisations with skills in evaluation, outcomes, Excel and accountancy will find it easier, but you can build up slowly.

- **Community impact mapping** requires a low level of skill
- **SAA** will need some knowledge of stakeholder engagement and analysis
- **SROI** will need the same skills as for SAA, and in addition requires strong analytical skills and familiarity with spreadsheets. It can be resource intensive when attempting to put financial values on social impacts.

## WHAT TYPE OF IMPACT DO YOU WANT TO ASSESS?

### 1. We want to know our impact on the environment

- **Ecomapping** can be used as an introduction to environmental impact measurement
- **Emas easy** is built upon Ecomapping and can be externally accredited.

### 2. We want to know about our wider economic impact

- **LM3** tells you about how money flows within your locality
- **SROI** expresses in monetary terms the value of your activities.

### 3. We want a comprehensive overview of our impact on the environment, the economy and society

- **SIMPLE** is a framework that can be embedded into your organisation
- **SAA** takes stock of the organisation's values and feedback from stakeholders to determine the scope, or what will be measured. Flexible and rigorous.
- **SROI** involves stakeholders to identify outcomes. SROI will present the value of an organisation's impact in the language of money. Rigorous and technical.

### 4. We want to assess the impact of volunteering

- The **Volunteering impact assessment toolkit** is designed to assess the impact of volunteering on all key stakeholders.

# CRITERIA TABLES

The tables on the next two pages give an indication of the resources you will need in order to implement each social impact measurement or quality system.

## Where did this information come from?

The information in the Criteria Tables was drawn from [Charity Evaluation Services' First Steps in Quality](#), the New Economics Foundation's [Proving and Improving comparison chart](#), the information provided on individual tools and methods websites and the 2010 [research by Middlesex University](#) on the experiences of more than 30 organisations carrying out different methods.

## How to use the information

Use the criteria tables for step 4 (see [page 10](#)) to refine the choices on *Your option list*. Working through your list, check each of the tools and methods you selected in step 3 against the criteria that matter to you. Place ✓, ? or ✗ next to the option on your list as you decide. With the shortlist in hand you can then go to the final section and find out more about individual tools and links to their web pages for more information.

**Example of step 4:** Two quality systems have been written down on the worksheet after reading statement A.2 - EFQM and PQASSO. The *Criteria Table* shows that in complexity and cost EFQM is medium and PQASSO is low. For this particular organisation, short of money and without much experience of quality systems, PQASSO has been ticked because it seems more appropriate.

YOUR LIST OF OPTIONS WORKSHEET				
Step 1		Step 2	Step 3	Step 4
Page	Read?	Make a long list of tools	Choose	
	✓, ? or ✗	Each time you come across the name of a useful tool, write it down here	✓, ? or ✗	
<b>A) Your motivation</b>				
A.1 Effective	p14	✓	Community impact mapping Outcomes star	
A.2 Efficient	p14	✓	PQASSO EFQM	✓ ✗
A.3 Taking stock	p14	✗	n/a	
A.4 Publicising	p15	✓	Note to self: Check what data we already produce for others	
A.5 Quality Mark	p15	✗	n/a	

	Cost	Complexity	Time	Demand on staff	Certification or quality mark	Support available		
					CD rom	Consultant	Handbook	Online
C3perform	free	low	5 to 10 hours	low				
Customer Service Excellence	free	medium	medium	medium		✓		
Fit for purpose	free	low	medium	medium		✓		
EFQM	medium	medium	medium	medium	✗			
Quality First	low	low	low	low				
PQASSO 3rd edition	low	low to medium	medium to high	medium		✓		

**CRITERIA TABLE:** Social impact measurement tools

	<b>Cost</b>	<b>Complexity</b>	<b>Time</b>	<b>Demand on staff</b>	<b>Certification or quality mark</b>	<b>Support available</b>						
						<b>CD Rom</b>	<b>Consultant</b>	<b>Handbook</b>	<b>Online</b>	<b>Peer network</b>	<b>Publication</b>	<b>Training</b>
<b>Community Impact mapping</b>	free	low	3 hours	low				■				
<b>Eco-mapping</b>	free	low	1 hour per map	low			■	■	■			
<b>EMAS easy</b>	free	low to medium	1 hour per map	low to medium	£		■	■				■
<b>LM3</b>	free	medium	13 to 55 hours	low to medium				■	■	■	■	
<b>Prove It!</b>	free	low to medium	10% of project time	medium				■	■			■
<b>SIMPLE</b>	low	medium	medium	medium			■				■	
<b>SAA</b>	low	high	high	high	£							
<b>SROI</b>	low	high	high	high	£			■				
<b>Volunteering Impact Assessment Toolkit</b>	low	medium	medium	medium							■	■

**Explanation of the criteria:**

**Cost** is the cost of publication or training associated with the tool only. The cost of hiring a consultant or in seeking accreditation is not covered.

**Complexity** gives a rough estimation of how easy or difficult the method is. Much of this depends on the organisation's previous experience.

**Support available** shows what sort of help you can access if you do not have the relevant skills.

Where information is available, the **time** it takes to implement the method is given here. This could represent the demand on your staff or the time you will need to buy in from a consultant.

**Criteria table** for quality systems and outcomes tools [over the page →](#)

**CRITERIA TABLE:** Quality systems and outcomes tools

	Cost	Complexity	Time	Demand on staff	Certification or quality mark	Support available							
						CD rom	Consultant	Handbook	Online	Peer network	Publication	Training	Workshop
C3perform	free	low	5 to 10 hours	low									
Customer Service Excellence	free	medium	medium	medium			■		■			■	
Fit for purpose	free	low	medium	medium				■		■			
EFQM	medium	medium	medium	medium	£	■	■	■	■	■	■	■	
Quality First	low	low	low	low									
PQASSO	low	low to medium *	medium to high	medium	£	■		■		■	■	■	
Social enterprise balanced scorecard	medium	medium	medium	medium			■	■			■	■	
Third Sector Performance Dashboard	low	low	medium	low		■						■	
Outcome Star	free	medium	frontline work	medium					■		■	■	■
SOUL Record	low	medium	frontline work	medium		■	■	■					

\* PQASSO has 3 levels. Each level represents an increasing level of complexity, level 1 the lowest and 3 the highest.



# FINDING OUT MORE

This section is useful if you want to know a bit more about the tools and methods appearing in this guide. It also gives you a list of resources and websites you can go to for further information.



## SUMMARY OF THE TOOLS AND METHODS APPEARING IN THIS GUIDE

In this section you will find a summary of each tool and method that appears in the guide.

There are three sections:

- social impact measurement tools and frameworks
- quality systems, and
- outcomes tools.

SOCIAL IMPACT MEASUREMENT TOOLS AND FRAMEWORKS		
Type	Name (alphabetical order)	Summary
Impact mapping	Community Impact mapping	<p><i>Community Impact Mapping</i> can help you start to think about your story, why and how your organisation does what it does. It is a simple way to visualise your journey and the difference you are making to your community. Community Impact Mapping is not a fully comprehensive approach to measuring impact. But it is a start, and it provides the basis to do more if you choose.</p> <p><a href="http://www.dta.org.uk/resources/publications/tellyourstory">http://www.dta.org.uk/resources/publications/tellyourstory</a></p>
Impact tool	Eco-mapping	<p><i>Ecomapping</i> is a tool to help small organisations to implement environmental management. It is the first step towards integrating environmental considerations into the day-to-day activities of small organisations. It covers:</p> <ul style="list-style-type: none"><li>• an inventory of practices and problems</li><li>• a systematic method of conducting an on-site environmental review</li><li>• a collection of information which shows the current situation using visual language and a sketch of your workplace</li><li>• an adult learning and awareness-raising tool</li><li>• a tool which allows employee involvement and participation</li></ul> <p>It is a free tool developed by Heinz-Werner Engel as part of the International Network for Environmental Management (INEM) initiative, <i>EMAS (Eco-Management and Audit) Toolkit for SMEs</i>.</p> <p><a href="http://www.ecomapping.org/en/tools-methodes/ecomapping.html">http://www.ecomapping.org/en/tools-methodes/ecomapping.html</a></p>



SOCIAL IMPACT MEASUREMENT TOOLS AND FRAMEWORKS		
Type	Name (alphabetical order)	Summary
Impact audit	EMAS Easy and (EMAS)	A simplified version of <a href="#">EMAS</a> , (Eco Management & Audit Scheme), it is a management tool to evaluate, report and improve an organisation's environmental performance), <a href="#">EMAS Easy</a> is meant for small and medium-sized organisations to evaluate and reduce their environmental impact. Certification can be done in clusters to save time and money. A scheme developed by Heinz-Werner Engel, at Eco-Conseil Entreprise and supported by DG Environment. <a href="http://ec.europa.eu/environment/emas/index_en.htm">http://ec.europa.eu/environment/emas/index_en.htm</a>
Impact tool	LM3 - Local Multiplier 3	Designed to work out what impact an organisation or project has on the local economy, LM3 is simple to implement and shows how money flows locally. It can show the public sector contribution to the local economy in its procurement decisions. An <a href="#">online version</a> is now available, any expenditure on any geographical area can be analysed. It was developed by the New Economics Foundation. <a href="http://www.pluggingtheleaks.org/">http://www.pluggingtheleaks.org/</a>
Impact toolkit	Prove It!	Originally designed for neighbourhood renewal projects, <a href="#">Prove It!</a> aims to look beyond the 'easy-to-count' to the important changes happening for the participants and the communities in which they live. It helps people to evaluate small and medium-sized community projects by: <ul style="list-style-type: none"><li>• Involving volunteers and beneficiaries in telling their project's story</li><li>• Looking beyond the 'easy-to-count' to the important changes that might be happening for the participants and the communities in which they live</li><li>• Investigating how change takes place, and how to improve impact</li><li>• Sharing and building on the learning gained from peoples' experiences of taking part</li></ul> Further documents have been added to help in evaluation planning and reporting. Developed by the New Economics Foundation. <a href="http://www.proveit.org.uk">www.proveit.org.uk</a>

SOCIAL IMPACT MEASUREMENT TOOLS AND FRAMEWORKS		
Type	Name (alphabetical order)	Summary
Impact measurement framework	SIMPLE	<p>The Social IMPact measurement for Local Economies (<a href="#">SIMPLE</a>) impact model offers a five-step approach to impact measurement called SCOPE IT, MAP IT, TRACK IT, TELL IT and EMBED IT. The 5 stages of the process will identify mission, objective, stakeholders and ways to track changes. It is not an off the shelf method and requires training at the beginning delivered by Social Enterprise London, but once the structure has been put into place, time spent will decrease. It ensures regular monitoring, assessment and reporting of an organisation's impact. It was developed by Social Enterprise London (SEL) in conjunction with Brighton University.</p> <p><a href="http://www.sel.org.uk/">http://www.sel.org.uk/</a>  <a href="http://www.sel.org.uk/impact-assessment.aspx">http://www.sel.org.uk/impact-assessment.aspx</a></p>
Impact measurement framework	Social accounting and audit	<p><a href="#">Social accounting</a> establishes a framework for ongoing monitoring, evaluation and accountability to stakeholders both internal and external to the organisation. The process of social accounting can help an organisation to investigate its performance against social, environmental and economic objectives, and ensure that it is working in accordance with its values. In the private sector, social accounting is aligned with corporate social responsibility. It rests on 8 principles:</p> <ol style="list-style-type: none"> <li>1. Clarify purpose</li> <li>2. Define scope</li> <li>3. Engage stakeholders</li> <li>4. Determine materiality</li> <li>5. Make comparisons</li> <li>6. Be transparent</li> <li>7. Verify accounts</li> <li>8. Embed the process</li> </ol> <p><a href="http://www.socialauditnetwork.org.uk/">http://www.socialauditnetwork.org.uk/</a>  <a href="http://www.cbs-network.org.uk/socialacc.htm">http://www.cbs-network.org.uk/socialacc.htm</a></p>



SOCIAL IMPACT MEASUREMENT TOOLS AND FRAMEWORKS		
Type	Name (alphabetical order)	Summary
Impact measurement framework	SROI - Social Return on Investment	<p>Based upon the concept of financial return on investment, <a href="#">Social Return on Investment</a> expresses the effect of an activity on the environment, the people and the economy in financial terms. It is used to evaluate projects and organisations and can forecast the impact of a project. It follows a rigorous set of principles:</p> <ol style="list-style-type: none"><li>1. Involve stakeholders</li><li>2. Understand what changes</li><li>3. Value the things that matter</li><li>4. Only include what is material</li><li>5. Do not over-claim</li><li>6. Be transparent</li><li>7. Verify the result</li></ol> <p>Adapted by NEF, and now overseen by The SROI Network from a method developed by REDF, a San Francisco based venture philanthropy fund.</p> <p><a href="http://www.sroi-uk.org/">http://www.sroi-uk.org/</a></p>
Impact toolkit	Volunteering Impact Assessment Toolkit	<p>Designed to assess the impact of volunteering on all key stakeholders - the volunteers, the organisation, the beneficiaries, and the broader community, <a href="#">the toolkit</a> looks at a wide range of impacts, from the skills development of volunteers to the economic value of volunteering organisations. The basic steps and rationale behind each step make it easy to use for small and medium-sized organisations with no experience of impact measurement. The toolkit offers a set of pre-designed questionnaires. Developed by Global Services Institute, Washington University St. Louis. Click here for an <a href="#">overview</a></p> <p><a href="http://www.volunteering.org.uk/">http://www.volunteering.org.uk/</a></p>

QUALITY SYSTEMS		
Type	Name (alphabetical order)	Summary
Quality tool	C3perform	<p>A beginner's quality assurance scheme, <a href="#">C3perform</a> equips third sector organisations with a better understanding of their core business processes. The tools are built upon the EFQM Excellence Model, but they have been developed to be more appropriate to the third sector, featuring:</p> <ul style="list-style-type: none"> <li>• Equalities issues, social and environmental responsibility</li> <li>• Consideration of social outcomes and impact</li> <li>• Guidance notes- covering key issues relevant to the sector</li> <li>• Simplified scoring system</li> </ul> <p>The toolkit contains three self-assessment tools and works well with PQASSO (see below). C3Quick Perform is a shorter and simpler version of the C3Perform Workbook, a less intensive tool with fewer and simpler statements and can be completed by an individual in 15 mins. Designed by the C3partnership <a href="http://www.c3partnership.org/about-c3/the-c3-approach/">http://www.c3partnership.org/about-c3/the-c3-approach/</a></p>
Quality tool	Customer Service Excellence, previously Charter Mark	<p>A Government standard for public services receiving funding from the public sector, this is a practical tool that assesses the quality of the organisation's service delivery. It is a customer-focused standard. External assessment is required to gain the <a href="#">Customer Service Excellence</a> Standard which tests the organisation on areas that research has indicated are a priority for customers, with particular focus on delivery, timeliness, information, professionalism and staff attitude. Emphasis is also placed on developing customer insight, understanding the user's experience and robust measurement of service satisfaction. The Charter mark is awarded for 3 years.</p> <p>Online self assessment tool: <a href="http://www.cse.cabinetoffice.gov.uk/homeCSE.do">http://www.cse.cabinetoffice.gov.uk/homeCSE.do</a></p>



QUALITY SYSTEMS		
Type	Name (alphabetical order)	Summary
Quality framework	EFQM	<p>The <a href="#">EFQM</a> Excellence Model is the most widely used organisational framework in Europe and it is the basis for the majority of national and regional Quality Awards. Used as a tool for self assessment, it delivers a picture of how well the organisation compares to similar or very different kinds of organisations. As a management model it can be used to define aspirations for the organisation's capability and performance. As a framework it works well with other tools and standards. There is now a free website for first timers to perform an initial assessment. Owned by a not for profit organisation: European Foundation for Quality Management.</p> <p><a href="http://sites.google.com/site/myfirststepwithefqmmodel2010">http://sites.google.com/site/myfirststepwithefqmmodel2010</a></p>
Diagnostic tool	Fit for purpose	<p><a href="#">Fit for purpose</a> is a diagnostic tool to help new or developing social enterprises to assess their strengths and areas for improvement against key criteria. It is designed to:</p> <ul style="list-style-type: none"><li>• examine the organisational foundations necessary for a successful community enterprise</li><li>• highlight areas of achievement and those with room for improvement</li><li>• provide a report on the health of the organisation</li><li>• identify the organisation's support needs</li><li>• provide an action plan to clarify how to move forward</li></ul> <p>Written by the Development Trusts Association it is in the public domain and is free to download:</p> <p><a href="http://www.dta.org.uk/resources/publications/fitforpurpose">http://www.dta.org.uk/resources/publications/fitforpurpose</a></p>



QUALITY SYSTEMS		
Type	Name (alphabetical order)	Summary
Quality system	PQASSO 3 <sup>rd</sup> edition	<p><a href="#">PQASSO</a> (Practical Quality Assurance System for Small Organisations) is a self assessment tool for small and medium organisations or for a project within big organisations. It is user friendly and allows the organisation to work at its own pace, pinpointing areas in need of improvement, identifying strengths and weaknesses. It is particularly useful for small organisations as it helps with planning, budgeting and resource allocation to improve and meet the standard. PQASSO can be used for project evaluation. It now has a Certification scheme, the PQASSO Quality Mark. The external certification is relatively low cost making it attractive to small organisations. Published in 2008, its third edition has an outcomes approach to quality. PQASSO is also supported by the Big Lottery. Designed by Charities Evaluation Services <a href="http://www.ces-vol.org.uk/">http://www.ces-vol.org.uk/</a></p>
Diagnostic tool	Social Enterprise Balanced Scorecard	<p>The <a href="#">Social Enterprise Balanced Scorecard</a> is a mechanism used to track both quantitative and qualitative data simultaneously. It can be used as a diagnostic tool for voluntary organisations who are becoming social enterprises. Adapted for social enterprise by Social Enterprise London from David Norton and Robert Kaplan's original work, Balanced Scorecard. <a href="http://www.sel.org.uk/Balanced-scorecard.aspx">http://www.sel.org.uk/Balanced-scorecard.aspx</a></p>

QUALITY SYSTEMS		
Type	Name (alphabetical order)	Summary
Strategic management	Third Sector Performance Dashboard	<p>The <a href="#">Third Sector Performance Dashboard</a> is a CD-based performance management tool to help monitor and report on performance against set objectives. Under headings such as 'governance', 'finance/funding' and 'people &amp; work-life balance', organisations can either use the templates that are already provided for them within the licensed software or set their own objectives and measures. Using the tool as an integrated way of running their organisation enables users to monitor their progress and report to stakeholders accordingly. It holds a significant number of resources in the Resource Folder including template policies and procedures, distance travelled questionnaires, flexible working policies and a range of internet links to other resources and sources of information. It can also be used for individual projects or programmes. Developed by Social Firms UK based on the Balanced Scorecard.</p> <p><a href="http://socialfirmsuk.co.uk/resources/library/third-sector-performance-dashboard">http://socialfirmsuk.co.uk/resources/library/third-sector-performance-dashboard</a></p> <p>For a flavour of the dashboard go to <a href="#">Dashboard quick tutorial.ppt</a></p>
Quality system	Quality First	<p><a href="#">Quality First</a> is a simple quality assurance system designed for micro voluntary and community organisations. It is easy to use and requires little or no training. It is intended for small organisations with no paid employees or with 1 or 2 paid staff.</p> <p>It has 9 quality areas:</p> <ul style="list-style-type: none"> <li>• Stating purpose</li> <li>• Standards and values</li> <li>• Managing it all</li> <li>• Involving our community</li> <li>• Working together as volunteers</li> <li>• Equality and fairness</li> <li>• Reviewing work</li> <li>• Financial management</li> <li>• Communicating effectively</li> </ul> <p>Designed by Birmingham Voluntary Service Council (BVSC)</p> <p><a href="http://www.bvsc.org/development/quality-first.html">http://www.bvsc.org/development/quality-first.html</a></p>

OUTCOMES TOOLS		
Type	Name (alphabetical order)	Summary
Outcome tool	Outcomes Star	<p>The <a href="#">Outcomes Star</a> is an approach to measuring change when working with vulnerable people. It is used within the frontline work process and is integrated within assessments and reviews by providing data on many levels:</p> <ul style="list-style-type: none"> <li>• At the individual level it provides a picture of where the individual starts out and the outcomes achieved during the project</li> <li>• At project level an aggregation of the individual stars makes it possible to see whether a project is achieving its aim</li> <li>• At organisational level, it provides a summary of outcomes across all projects and makes it possible to make comparisons.</li> </ul> <p>It can also serve as a basis for reporting outcomes to commissioners and funders. An online version, the <a href="#">Outcomes Star System</a> is now available with charts stored online, making cross referencing easier. It can be trialled <a href="#">here</a></p> <p>Developed by Triangle Consulting.  <a href="http://www.homelessoutcomes.org.uk/The_Outcomes_Star.aspx">http://www.homelessoutcomes.org.uk/The_Outcomes_Star.aspx</a></p>
Outcomes tool	SOUL Record	<p>The <a href="#">SOUL Record</a>™ is a toolkit to measure soft outcome progression and informal learning, such as increases in confidence, self-esteem and motivation. It is split into sections relevant for adults, children and young people, with the latter 2 sections mapped against the five outcome areas of Every Child Matters. The toolkit is also RARPA (Recognising and Recording Progress and Achievement in Non-accredited Learning) compliant. Data from The SOUL Record™ can be used to assess the impact of a project, to support funding applications and to complete self assessments and provide evidence for Ofsted inspections. Its spreadsheet result package makes it easy to present the information in chart form. The toolkit is part of a package (CD, training, phone and mail support). Developed by the Research Centre, City College Norwich.  <a href="http://soulrecord.org/">http://soulrecord.org/</a></p>



## RESOURCES

Organisations to go to for further information	
Charity Evaluation Services (CES)	<a href="http://www.ces-vol.org.uk/">http://www.ces-vol.org.uk/</a>
National Council for Voluntary Organisations (NVCO)	<a href="http://www.ncvo-vol.org.uk/qstg">http://www.ncvo-vol.org.uk/qstg</a>
New Economics Foundation (NEF)	<a href="http://www.neweconomics.org/">http://www.neweconomics.org/</a>
UK Evaluation Society	<a href="http://www.evaluation.org.uk/">http://www.evaluation.org.uk/</a>
Proving and improving for social enterprises	<a href="http://www.proveandimprove.org/new/getst/index.php">http://www.proveandimprove.org/new/getst/index.php</a>

Further reading	
First steps in quality	<a href="http://www.ces-vol.org.uk/index.cfm?format=734">http://www.ces-vol.org.uk/index.cfm?format=734</a>
Information sheet on social accounting	<a href="http://www.lvsc.org.uk/files/100579/FileName/Informationsheetonsocialaccounting.pdf">http://www.lvsc.org.uk/files/100579/FileName/Informationsheetonsocialaccounting.pdf</a>
Managing outcomes: a guide for homelessness organisations	<a href="http://www.ces-vol.org.uk/downloads/managingoutcomes-16-22.pdf">http://www.ces-vol.org.uk/downloads/managingoutcomes-16-22.pdf</a>
Soft outcomes: a guide	<a href="http://www.equal-works.co.uk/resources/contentfiles/4165.pdf">http://www.equal-works.co.uk/resources/contentfiles/4165.pdf</a>
Guide to measuring soft outcomes and distance travelled	<a href="http://www.esf.gov.uk/_docs/distance1.pdf">http://www.esf.gov.uk/_docs/distance1.pdf</a>
Catching confidence toolkit	<a href="http://archive.niace.org.uk/Research/BasicSkills/Projects/Catching-confidence.htm">http://archive.niace.org.uk/Research/BasicSkills/Projects/Catching-confidence.htm</a>
Evaluation summary sheet	<a href="http://wales.gov.uk/docs/wefo/publications/deliveringguidance/rme/20071015evaluationsummarysheeten.pdf">http://wales.gov.uk/docs/wefo/publications/deliveringguidance/rme/20071015evaluationsummarysheeten.pdf</a>
Guidance on what to include in an evaluation brief	<a href="http://www.ces-vol.org.uk/index.cfm?format=431">http://www.ces-vol.org.uk/index.cfm?format=431</a>

Thinking about consultants:	
<b>See page 37 for more on The Guild's offer.</b>	
Social Return on Investment accredited practitioners	<a href="http://www.thesroinetwork.org/content/view/58/71/">http://www.thesroinetwork.org/content/view/58/71/</a>
Social Accounting and Audit register of auditors	<a href="http://www.socialauditnetwork.org.uk/index.php?option=com_content&amp;view=article&amp;id=54&amp;Itemid=89">http://www.socialauditnetwork.org.uk/index.php?option=com_content&amp;view=article&amp;id=54&amp;Itemid=89</a>
Outcomes Star champions	<a href="http://www.ces-vol.org.uk/index.cfm?pg=71">http://www.ces-vol.org.uk/index.cfm?pg=71</a>

Further tools and methods not assessed in this guide	
<a href="http://www.customerfirst.org/">www.customerfirst.org/</a>	For customer service
<a href="http://www.fairbridge.org.uk/spiritlevel/index.htm">www.fairbridge.org.uk/spiritlevel/index.htm</a>	Spirit Level an outcomes tool
<a href="http://www.rickterscale.com/Rickter scale">www.rickterscale.com/Rickter scale</a>	Rickter scale an outcomes tool



If you want to let the wider world know about the social impact of your work, find out more about the Social Enterprise Mark.

The Social Enterprise Mark identifies businesses that meet *defined* criteria for social enterprise. The Mark offers customers, the wider public and commissioners an instantly recognisable logo that stands for enterprises working for social and environmental aims, trading to benefit people and the planet.

To find out more on the Social Enterprise Mark and to register your interest go to: [www.socialenterprisemark.co.uk](http://www.socialenterprisemark.co.uk) or call the helpline on 0845 504 6536.



# GLOSSARY

**Aims**

Describe why the organisation exists and the difference it wants to make.

**Audit**

Is an independent review and examination of records and activities to check that certain standards are met.

**Baseline**

Is the very first measurement before a programme starts.

**Evaluation**

Is about making judgements on how an organisation, project or programme is performing using monitoring and other information.

**Frontline work**

Is work carried out directly with the beneficiaries of the service. Some tools refer to this as key work, making people who work like this key workers.

**Impact**

Is the social consequences, negative or positive, intended or not, of activities.

**Indicators**

Are the signs or clues agreed on to check planned progress towards a specific goal.

**Inputs**

Are the resources put into an organisation or project to carry out an activity: like money, equipment, volunteers' time, etc.

**Monitoring**

Is a planned, regular gathering of information to check progress made.

**Outcomes**

Are the changes that happen because of an activity.

**Outcomes tools**

Are a convenient and standardised way to record how much a service user has changed.

**Process**

Is a step by step course of actions describing how a task or activity is to be done.

**Quality Assurance**

Is a set of steps designed to make sure that a service is always delivered according to the same defined standards.

**Quality Standards**

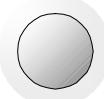
Provide a fixed mark against which comparisons can be made.

**Self-assessment**

Is when people within an organisation make judgements about how the organisation is performing, as opposed to bringing someone in from outside.

**Self-evaluation**

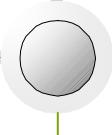
Is a continuous cycle of planning, monitoring, evaluating and using the information to improve an organisation, a programme or an activity.



## WITH THANKS...

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Shah Bipin	21 <sup>st</sup> Century Education Trust



## **HOW THE GUILD CAN HELP YOU TO MEASURE THE SOCIAL IMPACT OF YOUR ORGANISATION OR PROJECT**

- We will work through this tool with you to help you identify what resources and evidence you already have
- We will conduct an initial review of your evidence, identify any gaps and make recommendations about how you can proceed
- We will conduct an independent assessment of your evidence and produce a social impact report on your work
- We will undertake consultation with your users / members / customers / funders and others, to contribute towards your other social impact measurement work
- We will conduct a full Social Return on Investment by a qualified assessor, that includes consultation with your customers or service users and other stakeholders

You can pick and mix from any of these services depending on your starting point.

## **HOW THE GUILD CAN HELP IF YOU COMMISSION SERVICES**

- We can help you to write the various social impact measurement tools into your commissioning or procurement processes

# GETTING STARTED IN SOCIAL IMPACT MEASUREMENT

## A guide to choosing how to measure social impact

This guide is for people working or volunteering in small or medium-sized organisations new (or fairly new) to social impact measurement. Cutting through the swathes of information out there on the subject, this guide will get you started thinking about how to measure social impact.

**“A very valuable, user friendly guide”**

**“Thought provoking questions help towards understanding”**

**“It is very good for communities. It is something that communities can use. They don't see the impact of what they are doing, now they can be informed and choose”**



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University



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