

Definition	Symbol
Flexible/variable	✳
Free	£
Cost	✳
Time horizon	🕒
Demand on staff time	👤
Prior knowledge/background reading	📖
Resources needed	👤
Complexity	●●●●●
Support available*	📱
Online resources	💻
Consultants	👤
Software	💻
Peer network	👤
Training courses	🎓
Handbook	📖
Publications	📖
Required	★
Available	✓
Not available	✗

Key

Look Back Move Forward

Look Back Move Forward (LBMF) is a simple participative project evaluation and learning tool. The tool guides a two-hour self-facilitated workshop that focuses on an interactive poster. The poster comes with instructions to guide participants through a series of stages, giving them the opportunity to reflect on a project they have worked on together from a number of different perspectives, as well as to compare and learn from each other's experiences. The finished poster provides a visual record of the participant's views on the project, which can be used for discussion and learning. It has been used by Groundwork and British Waterways.

http://www.neweconomics.org/gen/newways_feedback.aspx

Outcomes Star

The Outcomes Star was originally developed by Triangle Consulting as a tool for measuring the outcome of work with homeless people. It provides a means of capturing distance travelled by clients along multiple outcome domains (e.g. mental health, autonomy, money). Alternative versions are now available for women's refugees, young care leavers/16-26-year-olds and for the mental health sector.

<http://www.triangleconsulting.co.uk/the-outcomes-star/>

Sustainable Sun Needs-Analysis Tool

The Sustainable Sun Needs-Analysis Tool is designed to help organisations work out where they are now in each of seven areas which are integral to the long-term sustainability of their organisations. Organisations can work through the chart on their own, or together with an advisor. The chart enables them to plot their current organisational health and consider future development.

[http://www.ncvo-vol.org.uk/uploadedFiles/NCVO/What_we_do/Sustainable_Funding/Support_for_Infrastructure/suntool_white_cover_\(6pgs\).pdf](http://www.ncvo-vol.org.uk/uploadedFiles/NCVO/What_we_do/Sustainable_Funding/Support_for_Infrastructure/suntool_white_cover_(6pgs).pdf)

About comparing proving and improving approaches

The chart contains information to help guide you in thinking through the major considerations when deciding which tools are most suitable for use with your organisation. As you read through it, be aware that the information presented is indicative. It cannot provide precise information about the exact costs and benefits that your unique organisation might incur along the way as there are many variables involved in using any of the methods. For example, our indication of 'costs' takes into account the relative costs of using the method to its completion, but cannot tell you how much it will cost if your organisation engages a consultant, or what it will cost to implement measures that your organisation may take to improve its quality and impact as a result.

External approval/verification

The chart can be used as a wall poster, providing a straightforward reference point for choosing and using methods to help organisations to prove and improve. Ultimately it is intended to serve you, and can be used in whatever way you find most practical and fruitful.

Not ready for these approaches?

Each column in the chart provides information on some of the characteristics of each tool. They are arranged as follows:

Description

Sums up the essence of the tool in one sentence. It is only a brief glimpse – you can consult the full summary for a more thorough description.

Potential benefits

Lists three potential benefits of the tool, in terms of its characteristics and the outcomes that can result from its use. Other potential benefits – and limitations – are featured in the **tools** booklet.

Resources needed

Icons in this column give you an indication of the resources that are needed to implement the tool. There will naturally be some variation in resource needs depending on the size of your organisation and the way in which the tool is used. The key on

<http://www.ces-vol.org.uk/index.cfm?pg=124>

CES Planning Triangle

The triangle is a visual tool designed to help organisations identify their aims and objectives. CES has used it successfully in training and consultancy over many years to assist organisations in clarifying what they are trying 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.

<http://www.ces-vol.org.uk/index.cfm?pg=124>

Comparing proving and improving approaches

This chart offers an overview of the approaches to measuring impact and quality found in the accompanying **tools** booklet. Here, you can see the key features of more than 20 methods. The chart has three purposes:

1. To help you to identify a tool to use either off-the-shelf or to adapt to meet your needs in measuring impact, reporting on performance, demonstrating quality, or developing business strategy.
2. To give you the general information you need in order to respond to suggestions or requirements that you take up a particular method or tool.
3. To enable those providing support and advice to third sector organisations to understand a range of approaches, and signpost their clients to places for further assistance, based on their needs and situation.

This chart will be most beneficial when it is read in conjunction with the **tools** booklet. You may also find more general introductions to impact measurement and quality useful. A good place to start is the resources on the **nef** (the new economics foundation) website for Proving and Improving: www.proveandimprove.org and the CES report *Accountability and learning* (<http://www.ces-vol.org.uk/index.cfm?pg=424>).

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comparing proving & improving approaches



Category	Method/tool	Description	Potential benefits	Resources needed	Complexity	Support available	External approval/verification
Social Impact	AA1000 Assurance Standard	A standard for assessing an organisation's social, environmental and economic reporting process, with stakeholder engagement at its core.	<ul style="list-style-type: none"> May be used by an organisation in preparing its social accounts/reports. Helps those who assess social reports to address performance and impact issues. Emphasises stakeholder engagement. 		●●●		✓
	Co-operative Environmental and Social Performance Indicators (CESPIs)	A group of ten indicators to help co-operatives and other organisations determine how they measure up to co-operative principles.	<ul style="list-style-type: none"> Can demonstrate to customers some of the benefits of co-operatives. Standardised and straightforward. Provides a first step for demonstrating that a co-operative organisation is living up to its values. 		●		✗
	Eco-mapping	An accessible tool for analysing and managing environmental behaviour at an organisation's site(s).	<ul style="list-style-type: none"> Allows an organisation to see where its negative environmental impacts occur. A systematic, straightforward review to guide environmental improvement. Free, and easy to understand. 		●		✗
	Global Reporting Initiative (GRI) Framework	A holistic framework that guides an organisation's reporting on social, environmental and economic performance.	<ul style="list-style-type: none"> Internationally recognised sustainability reporting, especially by large organisations. Can be useful for improving comparability. Supports and integrates with other tools, for example, Social Accounting, AA1000. Flexible: can be adapted and used in different sectors. 		●●●		★
	Local Multiplier 3 (LM3)	A DIY method that shows the effect of an organisation's spending on its local economy. • Demonstrates impact on local economy.	<ul style="list-style-type: none"> Clearly highlights where local economic impact can be improved. Quick and relatively easy compared to other forms of economic evaluation. 		●●		✗
	Prove It!	A participative method for measuring the effect of community projects (or other projects) on local people, on the relationships between them and on their quality of life.	<ul style="list-style-type: none"> Measures how quality of life of communities and individuals change as a result of an organisation's endeavours. Measures and documents outcomes. Participative method helps build trust in the community. 		●●		✗
	Social Accounting and Audit	A framework to help clarify an organisation's values and objectives, report on performance against their objectives, and demonstrate social, environmental and economic outcomes/impacts, emphasising stakeholder engagement.	<ul style="list-style-type: none"> Covers a full range of performance and impact issues. Stakeholders' perspectives feed into the organisation's planning and measurement process. Flexible – can be combined with other 'proving and improving' tools. External verification of social accounts through auditing available on a consultancy basis. 		●●●		★
	Social Impact Measurement for Local Economies (SIMPLE)	A framework that combines internal strategic review with outcomes-based assessment to help managers of socially motivated businesses to visualise where and how they make positive contributions to society.	<ul style="list-style-type: none"> A dynamic approach that embeds impact measurement and reporting into an organisation's processes and systems. Sufficiently comprehensive and adaptable to meet the needs and circumstances of a wide range of social enterprises providing a strategic perspective that can be used to improve performance. Practical in its application but based on a sound theoretical perspective. 		●●		✗
	Social Return on Investment (SROI)	A participative method for comparing the value of social, environmental and economic benefit created by an organisation/initiative with the investment needed to create that value.	<ul style="list-style-type: none"> Robust method for a comprehensive assessment of an organisation's outcomes. Stakeholders' perspectives feed into the organisation's planning and measurement process. External verification of SROI analysis available. Makes visible trade-offs between competing demands for resources. 		●●		★
	Volunteering Impact Assessment Toolkit	A self-assessment exercise for organisations involving volunteers to gain a clearer understanding of the impact of volunteering activity on key stakeholders.	<ul style="list-style-type: none"> Repeated use can help track progress by comparing results over time, as well as exploring positive and negative, intended and unintended impacts of volunteering activity. Consists of a set of readymade core and supplementary questionnaires. Can communicate internal benefits of volunteering and capture external feedback from users and clients. 		●●		✗
Quality Systems	Development Trusts Association (DTA) Healthcheck 'Fit for Purpose'	A guide to good practice for development trusts and other community and social enterprises allowing them to assess their progress against the values of the development trust.	<ul style="list-style-type: none"> Can help new trusts to establish themselves, and established trusts to improve. Provides a backbone for the improvement conversation with DTA support staff. Helps new or developing community enterprises in assessing strengths and areas for improvement against key criteria. 		●		✗
	EFQM Excellence Model, European Foundation for Quality Management	A framework for identifying the strengths and areas for improvement of an organisation across all of its activities or a single issue/project.	<ul style="list-style-type: none"> Makes links between what an organisation does, the results it achieves, and how these results are reached. Easy to use in 'bite-sized' parts or for whole organisation. Can be used for self-assessment or submitted for external award. 		●●		★
	Eco-Management and Audit Scheme (EMAS)	An environmental management framework that provides the basis for a published environmental report and addresses the whole organisation's environmental performance.	<ul style="list-style-type: none"> Wide ranging; incorporates tools, such as ISO 14001 and Eco-mapping. EMAS logo can help communicate commitment to environmental issues. Through commitment to a cycle of improvement helps organisations reduce waste, energy use and resources that can help to reduce costs. 		●●●		✓
	Investors in People Standard	A business improvement tool designed to advance an organisation's performance through improving its relationship with its employees.	<ul style="list-style-type: none"> A method for improving staff management, employee satisfaction, motivation, and access to training and development. Inclusive: involves paid and unpaid staff. Award 'mark' is widely recognised by staff, funders and customers. 		●●		✓
	ISO 9000 Series, International Organisation for Standardisation	A quality management system for the process of production, providing standards and requirements for how production is managed and reviewed for the whole organisation.	<ul style="list-style-type: none"> Well known and recognised internationally. Can improve internal and external communication of management procedures. Covers an extensive range of areas to improve the quality of management. 		●●●		✓
	Practical Quality Assurance System for Small Organisations (PQASSO)	A holistic quality management system designed specifically for small and medium-sized voluntary and community organisations.	<ul style="list-style-type: none"> Step-by-step approach provides a simple way of identifying what an organisation is doing well and where it can improve. Helps to set priorities for the future and to make improvements. Seeks to improve a wide range of quality issues. An externally assessed PQASSO quality mark is also available. 		●		✓
	Quality First	A simple quality management framework aimed at very small organisations (for example, those run primarily by volunteers).	<ul style="list-style-type: none"> Simple to use. Systematically addresses quality without requiring an organisation to be familiar with more complex quality assurance systems. Addresses limited capacity. 		●		✗
	The Big Picture	A framework for identifying the strengths and areas for improvement of an organisation across all of its activities or a single issue/project.	<ul style="list-style-type: none"> Makes links between what an organisation does, the results it achieves, and how these results are reached. Easy to use in 'bite-sized' parts or for whole organisation. Works for small organisations. 		●●		✗
Strategic Management	Third Sector Performance Dashboard	An internal management tool for business improvement geared towards social firms.	<ul style="list-style-type: none"> Helps an organisation to spell out its social, environmental as well as financial objectives and track performance on these over time. Can integrate with existing systems easily. Easy to use and free for social firms. 		●		✗
	Social Enterprise Balanced Scorecard	An internal management tool and visual representation for social, environmental and economic strategy and financial sustainability.	<ul style="list-style-type: none"> Useful for managing strategic organisational change. Helps to focus on strategic planning and measuring progress. Can facilitate communication of organisation's goals internally and externally. Builds on established Balanced Scorecard technology. 		●●		✗