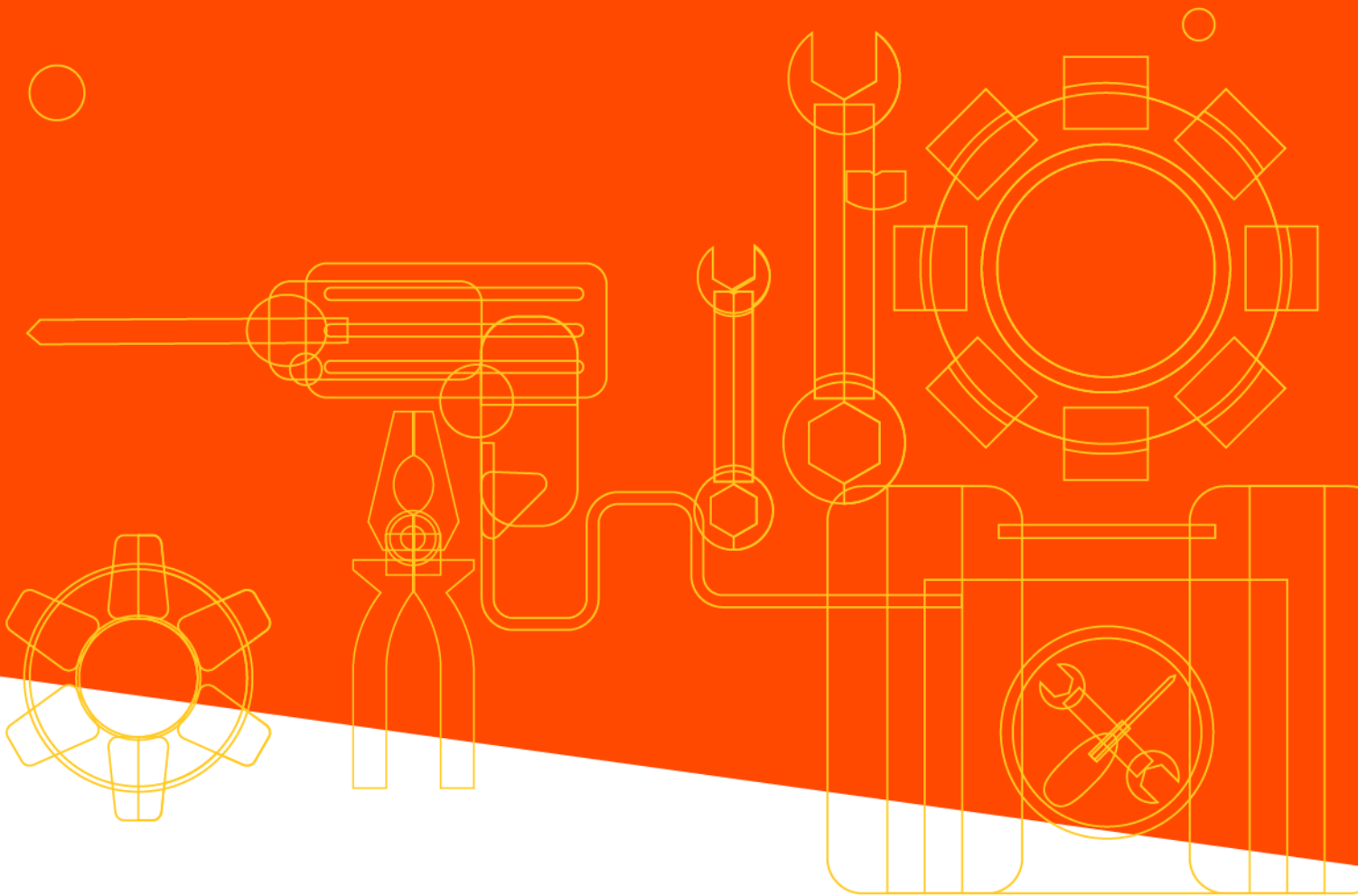
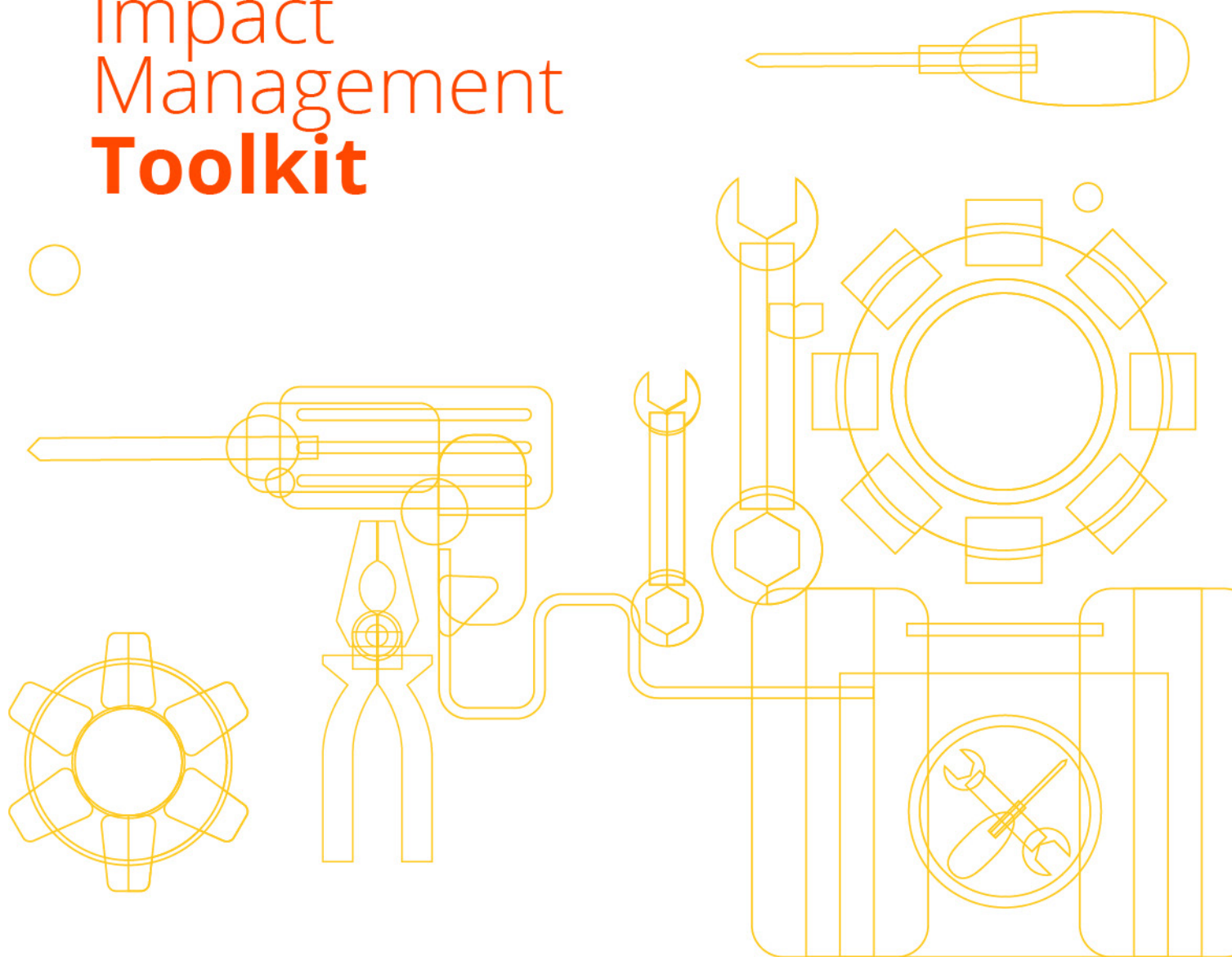


Social Impact Management **Toolkit**



Social Impact Management **Toolkit**



Partners:



Supported by:



MitOst

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An introduction

Social Impact Management Toolkit for small and medium organisations (SMOs) is the result of a short pilot project born from discussions within the Civil Society Cluster of the Bosch Alumni Network/International Alumni Center - and thus received their support as well as MitOst guidance.

This toolkit is designed for organizations that aspire to grow, to play a meaningful role in their context, and to develop an organizational culture for learning and improvement. We reviewed and brought together in a structured way an array of tools that can help SMOs to prepare for, design, and implement social impact management.

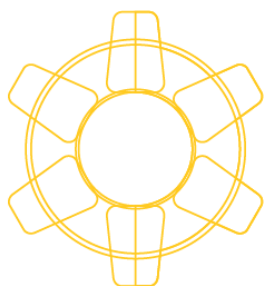
It is also a statement we are making with regard to the situation of SMOs. Our message is two-fold: relating to the sustainability of the sector that enables or precludes SMOs to exist and persist and to the importance of donor understanding of local contexts, including donor practices that are tailored to the capacity of SMOs.

SMOs are among the most vulnerable entities in the European civil society, especially so in the new European Union (EU) Member States but also in some of the southern European countries. Their ability to form, persist, and develop is directly affected by legal environment, social perception, skills of its members, and access to private and public funding. In some of the new EU Member States civil society space is increasingly shrinking, organizations being forced out or experiencing several kinds of pressure.

At the same time, SMOs' growth is sometimes limited by their engagement with funding organizations. Often, donor procedures impose processes that surpass the capacity of their grantees.

With these elements in mind, the ability of SMOs to show their work, progress, and impact becomes essential. If, and only if, SMOs are able to show the added value they bring are they likely to be supported and defended by their communities. Also, only if SMOs understand their level of capacity, can they engage with funders in a way that is supporting, rather than hindering their growth.

The aim of this toolkit is to support SMOs in overcoming those challenges by setting and achieving their impact management goals. We believe this can be done by embedding an impact mindset throughout its project's life cycle from inception and design to assessment and closure.



Social impact management: why do you need it?

Social impact is the medium or long term change in a population's well-being as a result of a given project, program or policy. It can be positive or negative, intended or unintended. Social Impact Management (SIM) is a framework that allows projects and organisations to continuously prove and improve their capacity to increase well-being in the communities they work with.

Why SMOs need SIM? When is it useful for a SMO? Which tools are appropriate for SMOs? One could state that SMOs need SIM tools and procedures for management learning, efficiency or better performance, to have gains in transparency and for designing a strategy. Above all, they need it for the sustainability of the organisation and to deliver a better service for those it serves and the community.

Once we've set the ground for a common understanding of impact assessment and before diving deeper into this toolkit, consider these assumptions:

- SIM requires time, and an organization needs to carefully assess its time resources in order to make sure that using SIM-related tools is feasible;
- SIM requires staff, either voluntary or paid, as a few hours of work are needed to apply any SIM tool;
- SIM requires willingness to go a step further, to learn about the way an organisation delivers activities and to be able to change its performance; and
- SIM requires the ability of an organization to question both itself and its constituency, as learning implies acknowledging also the negative parts of an organisation's action or strategy.

Consider also what a SMO needs to have in place when searching for the best SIM management tools for their case - a small internal diagnosis will be useful to go through the first steps, finding the time and space for an away day or a dedicated meeting. Inviting a facilitator can help to have an outside view of:

- Where the organisation is,
- Resources (human and material) mapping,
- Strategy mapping,
- Future visioning.

This toolkit consists of 5 steps - from chapter 1 through 5 we explore the 5 stages of the impact management cycle: identifying social/societal challenges, mapping assets and needs, setting objectives and strategies, monitoring, and evaluation. All these are outlined having the SMOs perspective in mind.



1.1. Defining territory and scope of problem (rationale)

2.1 Organisational capacity assessment

2.2 Beneficiaries or other stakeholders assessment

3.1 Defining impact objectives

3.2 Designing Monitoring, Evaluation, Accountability and Learning system plans

3.3 Planning sustainability

4.1 Measuring SI results

4.2 Verifying and valuing impact

4.3 Monitoring

5.1 Evaluation: output, outcome, impact

5.2 Reporting and communication



Step 1. **Defining the Overarching Societal Problem**

Small and medium organizations (SMOs) encounter significant pressures when carrying out their activities as the complexity of implementation often outweighs their level of capacity. This makes SMOs vulnerable as even slight hurdles can sometimes lead to their dissolution. SMO contexts need therefore to be well understood and managed by their leaders (be it paid staff or volunteers).

The ability of SMO leaders to comprehend well enough the context of their initiatives, as well as to take adequate decisions when faced with pressures relies on prioritizing the areas of work and keeping track of their advancement. SMOs will never have all the needed human, material, and financial resources needed for covering all relevant management processes. It is therefore important to prioritize the most relevant processes for successfully manage the organization and implement assumed activities.

Additionally, understanding how an organization works and what the implemented activities generate is key for taking informed decisions. Having the ability to track and collect data about how the organization functions and what it does is at the basis for making good decisions.

This is where impact management comes in. From very simple forms to complex processes that are fully integrated in the organization, this area is key for sustained, calibrated, and impactful growth.

Impact management should be on the agenda of SMO leaders even when the organizations they work for are not at the level of capacity necessary for implementing a full impact assessment process. To build such a process, SMOs need to prepare in advance by even simply collecting bits of data about their work and results. The tools we are going to present further in this toolkit are meant to support organizations both at incipient and more advanced levels of capacity in designing, implementing, and evaluating their impact.

1.1. Defining territory and scope of problem (rationale)

Social impact dwells in the realm of societal challenges. It is therefore crucial to ground your SIM architecture on a societal problem.

This broad problem sets our intervention's "why" - providing context, scope and relevance. It will also be the one framing the upper layer in a theory of change diagram - the purpose layer - or our vision statement. Examples of societal problems are ageing, migration, unemployment and racism. It can prove useful to frame a problem affecting mostly a specific group, such as youth unemployment or racism towards the roma population.

Taking this early step requires no special tool; it's simply a matter of collecting and presenting credible data to establish the problem or issue as a relevant one to all the stakeholders that our organisation or project intend to engage.

A final note to stress that since social impact relates to well being in a given population or community - local, national, international - our societal issue should be set within accepted quality of life frameworks or standards. The OECD Better Life Index¹ uses the following dimensions: Civic Engagement, Community, Education, Environment, Jobs, Income, Housing, Health, Life Satisfaction, Safety and Work-Life Balance.

Framing our problem within one or several of those fields provides us with an overarching set of widely accepted measures - indicators - to monitor and to evaluate our intervention's social outcomes and impacts.

¹ <http://www.oecdbetterlifeindex.org/>



Step 2. Mapping Assets and Needs

Prior to our dive into operational concerns we must take one more analytical step: mapping not only specific needs in the population affected by the identified societal problem but also the assets or resources available (in our organisation and in the territory - including the target population itself).

Why it's important to map both needs and assets? Taking stock of assets allows smarter planning and efficient implementation: goal setting will be more realistic and precise (thus with higher potential for effectiveness); implementation will use the strictly necessary resources to produce the expected results² and probably reduce operational costs since some of those resources might be available at no or reduced cost.

Another significant implication of considering existent assets is a shift in perspective: impact management welcomes any approach leaning towards proving and improving. This somewhat positivistic perspective will work better if we start as soon as possible to address both problems and solutions, needs and assets.

Consequently we advocate for solutions based tools: problem trees must be converted into solutions trees; theory of change types of mapping are favoured because they focus on the paths of causality towards change: the chains of outcomes - and eventually impacts - that are expected to unfold over time as a result of our activities.

Finally there is a political implication. If we map and ultimately mobilize assets belonging to the target population (e.g., their knowledge) you are engaging and empowering such stakeholders in our impact management cycle. Even the population affected by the social challenge can be considered as a potential source of assets and an agent for change - not just as a passive and disenfranchised stakeholder.

² In this and other steps impact management is strongly aligned with results based management (RBM).

2.1 Organisational capacity assessment

It is of little use mapping stakeholders such as the target population or the regulatory institutions if we do not have a notion of our own assets - first and foremost our organisation's capacity.

Organizational capacity building is a process that develops the efficiency and effectiveness of an organization - or set of organizations - to produce results and impact. The capacity level of an organization defines the limits of its ambition, when it comes to creating impact.

In order to implement an organizational assessment, it is important to look at the organization as a complex ecosystem - in which the capacity level of the whole interacts the skills of each individual collaborator - and understand how these resources can produce new learning opportunities and results.

This process - provided that it involves a representative number of stakeholders - allows the identification of the organization's needs for improvement and the enhancement of its accountability.

We're talking about capacity areas such as: Strategy; Relationship; Operations and Adaptability. We suggest you structure your organisation's capacity assessment in 4 steps:

1. Exploration - using interviews and documentation review to establish an initial profile of the organisation and its context.
 2. Self-diagnosis - administering to the staff and/or volunteers a questionnaire structured to evaluate the organisation's critical capacities.
 3. Discussion - analysing the data collected in steps 1 and 2 in collaboration with internal and external stakeholders (the focus group method is recommended).
 4. Proposal - a document with main conclusions and recommendations for capacity building.
-

An example of a tool for our organisation's capacity assessment:



Tool OCAT

Description

Questionnaire assessing organizational capacity in key areas: Aspirations, Strategy, Funding, Leadership, Staff and Volunteers, Values, Learning and Innovation, Marketing and Communication, Managing Processes, Organization, Infrastructure and Technology, Advocacy

Readiness Checklist

- ✓ Statutes, organisational and operational rules and organograms available
- ✓ Employees and/or volunteers identified

2.2 Stakeholder assessment

Questions that need to be answered in this stage:

- *Who are my stakeholders/beneficiaries? How are they affected by the problems concerned?*
- *Who contributes to your project? What is their motivation? What level of commitment do you accept?*
- *Who are the main decision makers who can enable or block the process of your project?*
- *How will you communicate with your stakeholders (channels)?*
- *Who are your competitors in the area of work?*

When planning any project, and after defining the problem or challenge we are facing we also need to define who is affected by the problem: who is the solution designed for. The stakeholders of a project can be any person, group of people, organisations affected by the project in question, or any agent who has an effect on your impact. A stakeholder assessment is a process developed at the preparation phase of the project to identify the relevant agents, their level of participation and influence on the project or even on the organization.

By assessing stakeholders we need to define them and their roles, how they are affected by our actions and also what negative or positive effect they can have on our project/organization: either enabling or blocking the planned activities. Furthermore we need to consider who are the beneficiaries - the target group of our project with whom we can partner or network, who can have a say in taking decisions, who may invest in our approach. In order to maximize impact and to be able to measure it we need to collect exact numbers about the stakeholders of our project or organization.

It is advisable for each of the stakeholder groups to describe: what category they belong to; their number; how they are connected to the issue; what their social situation is; how they can contribute to the project; how they can benefit from the project; how to communicate with them.

The assessment can be performed following these steps:

1. Identification of stakeholders (beneficiaries and other stakeholders) by different criteria,
2. Mapping of inter-connections among these people, groups, organisations,
3. Identification of stakeholders' roles, needs, risks, power etc.,
4. Planning of their involvement in your initiative (communication channels and level of involvement),
5. Selection of outcomes and impact connected to the stakeholders and their measuring through indicators.

Lastly, we recommend that the organization taking both a broad / international perspective on the stakeholders and on the solution itself - as already existing best practices can help planning, implementing and measuring the project.

An example of a tool for beneficiaries or other stakeholders assessment:



Tool **CERISE SBS**

Description

A scorecard with 7 dimensions, of which "public" and "partnership" dimensions focus on the organization's attitude towards beneficiaries and partners.

Readiness Checklist

- ✓ Research on how to reach your beneficiaries (channels)
- ✓ Strengthen the relations with your stakeholders
- ✓ Partner networks to reach out to



Step 3. Setting Objectives and Strategies

Questions that need to be answered in this stage:

- Does the project objectives fit into your organisational mission, strategy?
- What is your solution to overcome the challenge?
- What are your activity related outputs, outcomes that you want to reach? What impact do you want to achieve?
- What negative impact can your project have on its target: people, environment?
- How do you plan to measure your impact?
- Do you have the needed capacity to measure your impact?
- How do you plan to feed back your results to include changes?

Once we have a clear picture about the challenge we want to solve, and have mapped our assets, needs, our organisational capacity as well as the stakeholders affected by the problem, or having influence on the designing of the solution, we should (again) ask ourselves: what do I want to achieve? What is my goal?

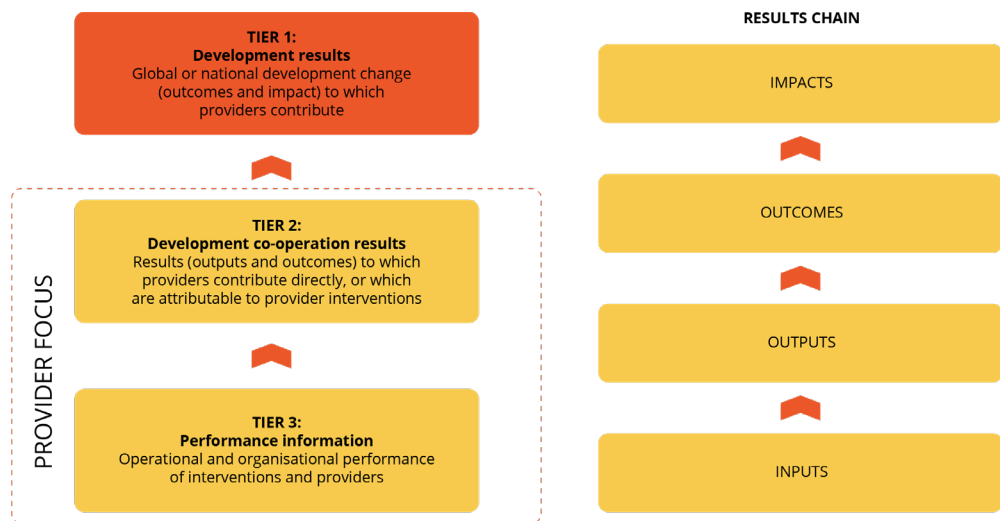
When doing so, there are successive stages to follow. The tools listed for this stage help us take these steps and differentiate between the ends we want to meet: results, outputs, outcomes, and impacts of a project.

There is not only one way to get from our activities to the intended impact, however it can be helpful to learn about “the result chain” developed by the Organization for Economic Cooperation and Development (OECD), Development Assistance Committee (DAC) to understand the steps that lead to achieving our goals.

The OECD definition for result i as follows³

³ OECD DAC - What are results?:
<https://www.oecd.org/dac/results-development/what-are-results.htm>

“Results are defined as the outputs, outcomes or impacts of development interventions, with each element contributing to the next, as set out in the results chain below. The links between each element are as important as the results themselves, reflecting the theory of change and the roles of providers and other stakeholders.



Outputs: The products, capital goods and services which result from development interventions.

Outcomes: The likely or achieved short-term and medium-term change and effects of intervention outputs.

Impact: Positive and negative, primary and secondary long-term effects produced by development interventions”

By planning impact objectives we want to tell what changes we want to achieve in our beneficiaries life, in a community or even in the broader society. It can be changes in their attitudes, knowledge or behaviors. It is useful to consider direct and indirect impact as well, while the direct impact affects the beneficiaries, the indirect impact has an impact on the environment.

An impact someone or an organisation makes could be positive or negative. It is important to bear in mind that both are legitimate and useful for the learning procedure. When having unwanted, unforeseen negative impact it gives a true feedback on how to change the project itself. Also impact can be intended, and unintended as well. An initiative of any type always causes some unintended changes, these need to be recognized and after the first evaluation added to the impact objectives, so to be able to measure it too.

3.1 Defining impact objectives

Questions that need to be answered in this stage:

- *What change do you want to achieve?*
- *What is your solution to overcome the challenge?*
- *What is your goal for measuring impact? What does it bring to you?*
- *Does the project objectives fit into your organisational mission, strategy?*
- *What are your activity related outputs, outcomes that you want to reach? What impact do you want to achieve?*
- *Are your objectives socially innovative?*
- *What negative impact can your project have on its target: people, environment?*
- *What is the time interval you want to achieve your objectives?*

Although one can say that it is impossible to plan the impacts of a project beforehand entirely, and it is true, there are always presumptions that we have to make when launching a project from scratch. However, there is no monitoring, evaluation and measuring of results possible if we do not plan our objectives in detail. Defining our impact objectives is an on-going process, changes in our activities, in the target group may occur and lead to the necessity of rethinking, adjusting our first objectives.

The tools collected for this stage range from easy step-by-step tables to more complex methods to plan our results, our impact.

From the tools we recommend for planning our impact objectives we highlight the following:



Tool

Theory of Change

Description

The tool serves a better understanding in how change actually happens, as well as a better planning and evaluation of long-term achievements beyond simple project outputs.

Readiness Checklist

- Have clear overall goals and objectives
- Start thinking of what changes you want to achieve

3.2 Designing Monitoring, Evaluation, Accountability and Learning system plans

Questions that need to be answered in this stage:

- *How do you plan to measure your results and impact?*
- *How do you plan to monitor your results: by whom, how often, by what means?*
- *How do you plan to evaluate your results: by whom, how often, by what means?*
- *Do you have the needed capacity to measure your impact?*
- *How do you plan to feed back your results to include changes?*
- *Who would you like to share the results of your monitoring, evaluation results?*
- *What make you credible? What are your organisational values?*
- *How can you achieve transparency?*

The purpose of impact assessment is not solely to collect data. The key is the way the collected data is used. In order to be able to use data meaningfully, one cannot underscore enough how important the design of the data collection strategies is, even from the very beginning of an organization, when one is in a start-up phase.

Monitoring is a regularly implemented assessment of the project's performance aiming to provide data to the project managers on where to adjust the project, where to increase performance.

Evaluation is generally at least realized at the end of a project, but suggested to take place at the different stages of the project with a more in depth approach. It gives a broader picture on the effectiveness of the project, and on the results achieved.

Accountability means being credible and liable for the activities and impact we have made, while learning is the conscious process of self-assessment one undergoes while wanting to achieve societal impact. To be a learning organisation means openness and willingness to learn from our successes and failures.

Data collection, monitoring and evaluation is not the goal per se; It provides internal and external accountability as well as an enhancement of one's planned actions. It is crucial that the whole process involves the beneficiaries and stakeholders, to include their feedback in the evaluation process, and to become transparent and thus accountable for the activities undertaken.

This includes sharing information, welcoming feedback and complaints, and incorporating these into the development of the project itself. More efficiently, the objectives should be set already by involving the target group.

This approach supports an evidence based impact measurement, which means not only routine monitoring and evaluating activities and results, but also assessing against minimum standards and sharing of findings with stakeholders.

What tools to use for planning an efficient monitoring, evaluation, accountability and learning process? Here is one suggested method:



Tool

Impact management principles

Description

An easy-to-use 5-step-tool for you to set objectives, analyse stakeholders, measure results, verify and value impact and monitor and report. It offers you tangible advice on how to monitor and evaluate your results.

Readiness Checklist

- ✓ Key outcomes and respective indicators must be set.
- ✓ Plan with human and financial resources.

3.3 Planning sustainability

Questions that need to be answered in this stage:

- Is sustainability important to you, why?
- What is your outreach of your sustainability plan: local, regional, national, international?
- What are the main areas of your activity concerning sustainability (referring to SDGs)?
- What impact you want to make related to sustainability?
- How do your sustainability plans fit into your overall goals?

Planning sustainability is planning for the future. Meaning not only sustaining the organization and its work, but also meeting the target group's and the community's goals on a long term. It refers to achieving financial, societal and environmental sustainability at once.

In a broader sense to achieve peace and prosperity for the community we work for, it is advisable to follow the Sustainable Development Goals (SDGs), adopted by the United Nations Member States in 2015. The SDGs are the development of the former Millennium Development Goals (MDGs) aiming to reduce extreme poverty by 2015. The 17 Global Goals are a universal call to action to end poverty, protect the planet and ensure that all people enjoy peace and prosperity by 2030.⁴

⁴ <https://sustainabledevelopment.un.org/sdgs>

The SDGs give a hands-on structure we can always base our sustainability goals on. The impact of our sustainability goals can be measured as part of our overall impact measuring system or separately as part of our Sustainability Strategy, measuring the evidence of reaching our sustainable goals. The SDGs offer a good starting point for structuring our objectives: focusing on one or more SDGs, checking on the SDG's call for action, deciding on our impact objectives, setting indicators and measuring methods, and finally monitoring and evaluating our outcomes. By using internationally recognized tools, one always has the opportunity to compare its impact with others and to join international platforms.

Another key guideline for planning sustainability is the approach and the tools provided by the Organisation for Economic Co-operation and Development (OECD) namely the aforementioned Better Life Index.

The OECD reflects also on the SDGs and contributes to achieving the Global Goals: "The OECD is contributing by: 1) improving policies and the way they work together; 2) mobilising resources for sustainable development; 3) working for well-being for all; 4) ensuring the planet's sustainability; 5) leveraging the power of partnerships; 6) strengthening data availability and capacity; and 7) facilitating follow up and review"

It is always useful to check and fit our national or local sustainability goals to the goals and developments present in the international arena.

One of the tools we found good for planning and measuring sustainability impact is CERISE's SP14.:



Tool CERISE (SP14)

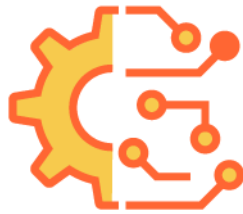
Description

By filling out a questionnaire of 6 dimensions you will receive your results on a percentage-based scale and see how much you meet your sustainable objectives. You can select between different languages.

Readiness Checklist

- ✓ Knowledge of SDGs
- ✓ Have a clear sustainability strategy

⁵ <http://www.oecd.org/dac/The%20Sustainable%20Development%20Goals%20An%20overview%20of%20relevant%20OECD%20analysis.pdf>



Step 4. Engaging and Transforming

4.1 Monitoring SI Results Indicators

Impact management works as an additional layer to the other processes taking place in the organisation and its projects. As the activities are implemented one must make sure they absorb only the strictly necessary resources within the expected quality standards to obtain the operational goals. Nonetheless impact is something different.

Impact monitoring kicks in to make sure the activities are contributing to the expected social results or outcomes. A training program for marginalised youth might efficiently reach the target number of trainees and yet be unable to contribute to their social inclusion, namely by increasing their self-esteem, employability or literacy levels.

In order to prove that impact is in the making we must build on our well-being results - previously framed within our impact objectives (Section 3A) - and for each one of those use a set of indicators. Indicators can be quantitative or qualitative (.eg. in a youth training program, the number of jobs versus the level of self-esteem). One can either use available indicators or create new ones. Indicators are the critical tools to produce impact evidence - to measure.

The aforementioned OECD Better Life Index provides validated sets of indicators for each of the well-being dimensions. For instance Education uses years in education, student skills and educational attainment.

These are however top level indicators to measure national public policy. Most SMOs must look for indications that work at their level either by referring to studies of similar projects, to local policy guidelines or to their own experience - and thus create their own.

4.2 Measuring and Valuing SI Results

The most common device to measure results is a questionnaire with the indicators built into the questions and possible answers made available as a rating/scale. The most widely used type of scale is the Likert which assumes that distances between each possible answer option are equal.

Administering questionnaires using Likert type scales allows for rigorous comparison of answers given by the target group in different moments of the project's life cycle. This accounts for changes in the group's well-being from the time the activities began being monitored - the "T0" moment - to other planned moments (T1, T2,...) and ultimately until the project ends.

A final note to stress that monitoring results as a path for impact should not be looked upon simply as a control mechanism but mostly as one for dialogue and improvement: a mechanism instrumental to detect and implement positive changes in the project.

During the monitoring process, in addition to measure the overall quantity of well-being generated on must account for how the project is distributing that quantity across the board of expected results. During our design stage some results might have come across as more relevant than others. This means that any deviation from the objectives in those results is more serious than any other and must therefore be addressed ASAP.



Tool IRIS+

Description

Guide for funders, Measures the performance of an organization, including metrics to describe and quantify progress towards specific impact objectives.

Readiness Checklist

- ✓ Key outcomes and respective indicators set
- ✓ M&E staff and budget



Step 5. Improving and Innovating

This chapter will focus on two key aspects of impact management - evaluation and communication - as they go hand in hand. Evaluation offers us the analysis of our activity, while communication enables us to present to others our evidence based achievements.

The ability to use data well leads to improving one's activity and to generating innovation. Gathering data based on well conceived impact and organizational objectives provides us the opportunity to learn about how we can do better in our work and about what approaches are more adequate in our environments. For that to happen, one needs not only to collect data, but to also analyze it - basically to evaluate one's work.

5.1 Evaluation and Learning

The ability of SMOs to engage in evaluation is essential as it represents the basis for organizational learning and growth. Often organizations set good objectives, collect data, but fail to learn from their activity, because they do not allocate any time for analysis. Whether in the form of a yearly reflection meeting, or a thorough evaluation process, the opportunity to learn from one's activity should not be missed

Firstly we must stress that there is no international consensus on defining social impact. In Step 3 we presented the OECD framework for outputs, outcomes and impact. For this toolkit's purpose we consider impact as the medium or long term change in a population's well-being as a result of a given project, program or policy. It can be positive or negative, intended or unintended.

There are two main approaches to impact evaluation: one related to "contribution" and the other to "attribution". The theory-based evaluation considers "contribution" - it means the ability of intervention change theory to adequately explain observed change (plausibility of cause). On another hand, counterfactual impact evaluations consider attribution - to what extent can the observed change/outcome be attributed to the intervention (a measurement of the effect attributable to the intervention).

Impact evaluation is used during and/or at the end of an intervention to assess a program's effectiveness in achieving its overall objective(s). It can help to inform decisions about the continuation (or discontinuation), expansion, or replication of an intervention.

Furthermore, impact evaluation enables a better understanding of the process by which impacts are achieved and to identify the factors that promote or hinder their achievement⁶.

Impact evaluation or assessment can help us to answer the following types of questions:

- How well did the program work?
- Did the program produce or contribute to the intended outcomes in the short, medium and long term?
- For whom, in what ways and in what circumstances?
- What unintended outcomes (positive and negative) were produced?
- To what extent can changes be attributed to the program?
- What were the particular features of the program and context that made a difference?
- What was the influence of other factors?⁷

As seen in Step 3 every project has multiple results - which must be defined and set from the beginning. When evaluating results related to outcomes and to impact one must account not only for the overall quantity of well-being generated but also for how that quantity is distributed through the expected results.

This is critical if during our design stage we had established results with different degrees of relevance or value. In our youth training program example one might excel at producing high levels of literacy and still have a limited impact if it had been established that employability was much more important and we did poorly at that result.

Results can be valued either by asking respondents to rate them according to their importance or by assigning a monetary value to each one (assuming that monetary value acts as a proxy for the importance of a given asset in society).

The toolkit involves several tools that can support leaders of SMOs in the learning process through evaluation. One of the tools we suggest for evaluation and learning:



Tool **SROI Analysis**

Description

Participatory method for measuring extra-financial value (such as environmental or social value).

Readiness Checklist

- ✓ Monitoring processed.
- ✓ M&E staff and budget.

⁶ Impact Evaluation in UN Agency Evaluation Systems: Guidance on Selection, Planning and Management

⁷ https://www.betterevaluation.org/en/rainbow_framework/frame/specify_key_evaluation_questions_relevant%20OECD%20analysis.pdf

5.2 Reporting and communicating

Communicating one's results internally, within the organization, and externally, to the community, donors/funders, or wider public, is another key activity that SMOs need to put in their agendas. The ability to show what an organization does, the results it obtains, the outcomes it generates and the impact it delivers is essential for the sustainability of SMOs and for their ability to grow into robust and resilient organizations.

The capacity of an SMO determines the way communication can be undertaken. Any organization has multiple audiences it relates to for various reasons: implementing activities, mobilizing resources, showing results and impact. The way we engage with all relevant audiences needs prioritization and targeted messages.

An SMO will have limited time and resources to allocate to these processes, that is why relying on certain tools may prove useful, despite the high initial costs needed for integrating these tools in the activity of the SMO.

For communication purposes in SMOs' activity there are many tools - one example



Tool Benchmark

Description

A set of tools that enable communicating to larger groups, as for example delivering a campaign, or managing a newsletter.

Readiness Checklist

- ✓ Have GDPR policy in place,
- ✓ Have a database with email addresses.

Annexes

1. Add Benchmark chart

2. one page references final page > general about Social impact management + recommendations for funders - 1 sentence/line description of what you can find in each reference

Include <https://diytoolkit.org/>

Reference the <https://civilsocietytoolbox.org/>

Maybe 4Change project Comensi toolkit https://www.dropbox.com/s/1bzki6keoxd1zv9/COMEN-SI_X.pdf?dl=0

Maybe Cromo Communities toolkit?

NGOs methods research will use to monitor their effects e is playing in Turkey Monitoring the scope of Network project, how it should benefit from future financial aid, how about the need to monitor its effects of non-governmental organizations have become involved in this research.

For the EUMN, the action will facilitate becoming a mission oriented, effective, and efficient platform and an information and advocacy channel aiming to increase CSOs involvement in Turkey's EU accession process. In terms of capacity, the action will allow EUMN to apply the method of social impact analysis on EU programming and financial assistance towards Turkey and to expand that methodology to the civil society in Turkey.

Within the scope of this project, workshops for monitoring the impacts of non-governmental organizations are organized.

The specific objective of the action include: (i) creating methods and tools for monitoring and analyzing EU programming and financial assistance with a rights based approach so as to ensure civilian oversight of Turkey's accession process; (ii) to equip CSOs by technical and general knowledge on EU decision making processes in order help them to be more actively involved in accession mechanisms and bodies; (iii) to focus on social impact analysis as an important tool for both evaluating the political effect of the EU accession process and formulating evidence-based advocacy activities.

The most suitable methods for non-governmental organizations were selected and included in this project.

The Octagon (Manuals, Toolkits and Guidance)	A tool for the assessment
Evaluation of citizens'voice & Accountability	Review of the literature donor approaches report
NPO Certification Model	Impact Management
Participatory Organizational Evaluation Tool (POET)	Impact Management
UNDP CSO Capacity Assessment Tool	Social Performans Assessment
Social Audit: A Toolkit	

