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Impact reporting – what impact is being made?

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1. Introduction

The New Economic Foundation (nef) report “Unintended consequences” (Ryan-Collins, J., Sanfilippo, L., 2007) identifies “myths” that underpin the government’s efficiency drive. This includes:

The easily measured financial indicators of efficiency are dominating the harder-to-measure indicators of effectiveness – particularly those of wider social and environmental benefits that are essential to good local services

From a financial management perspective, how can one begin to measure effectiveness, until impact measurement and reporting has a clear framework? More charities are looking at impact reporting. A few already produce Impact reports distinct from their Annual report. If Impact reporting is to move forward, what is the current base-line? How well do charities currently report impact? The aim here is to consider a small sample of impact reports to see what progress is being made.

2. Why report impact?

The Charity Commission issued a research report RS8 in June 2004 on “Transparency and Accountability” which said in the foreword:-

Our evidence is that the general standard of performance against the transparency and accountability framework is not satisfactory

It went on to say (p 30):-

The impact of a charity's activities is of great interest to stakeholders as a measure of its effectiveness in applying its resources for public benefit... Reporting on the impact of a charity's activities is not a Charities SORP requirement but it is a key part of best practice in transparency and accountability to which charities should be giving greater attention.

So charities committed to best practice in transparency and accountability need to be considering Impact Reporting.

In April 2008 the SORP committee held a stakeholders forum to seek feedback on the issues that could usefully be addressed by the next SORP and to identify issues for future debate. Under the question “What needs to go in the [Trustees Annual] report”, the first point raised was “longer term impact reporting”. Impact reporting could well be heading onto Financial Managers agendas.

This raises a question of “how many charities currently produce an impact reports”

2.1 What does “impact” mean

The NCVO (Wainwright, Measuring Impact a Guide to Resources, n.d., p9) use a definition from Blankenburg (1995) who describes impact as:

“...long-term and sustainable changes introduced by a given intervention in the lives of beneficiaries. Impact can be related either to the specific objectives of an

intervention or to unanticipated changes caused by an intervention; such unanticipated changes may also occur in the lives of people not belonging to the beneficiary group. Impact can be either positive or negative.”

This allows for a very wide view of impact – included unintended impact. One of the questions this raises for “impact reporting” is: is it meant to report on intended (future) impact, or on actual (past) impact. Performance measurement would suggest past (including unintended), but performance management would presumably be looking at future, as would funders.

Andrew Hind (1995, p196) defines impact as:

“The charities ultimate objective”

A succinct definition – he clearly sees the link between impact and objectives as fundamental.

2.2 Impact and Outcomes

One of the first issues that arises when looking at impact reporting is the widespread mingling of the use of the words “impact” and “outcomes” (and sometimes “outputs”).

The definition of outcome as used by Hind (1995, 196) is, again, succinct, if somewhat open to interpretation :-

The changes necessary to achieve the required impact.

Moxham, C., and Boaden, R., (2007, p828) offer this more descriptive definition of outcomes:-

Outcomes are the benefits or changes for intended beneficiaries. They tend to be less tangible and therefore less countable than outputs. Outcomes are usually planned and are therefore set out in an organisation’s objectives.

The Impact and Outcome definition offered by Lawlor, E., Neitzert, E. and Nicholls, J., (2008, p48) is:-

- *Outcome: Changes resulting from the activity for individuals, community, or other stakeholders. For example, a new job, increased income or community cohesion.*
- *Impacts: Difference made by an organisation or project*

These various definitions don’t quite align. For instance, the word “change” appears in definitions of both impact and outcomes, which is confusing.

The RNID make little attempt to distinguish outcomes and impact in their well-acclaimed guide “The Value of impact reporting” published in 2004. In the section on measurement of impact it says:

RNID uses a mixture of process and outcome measure.

This implies that to measure “process and outcomes” is therefore to measure impact.

The New Philanthropy Capital 2005 guide “Funding Success” (Lumley, T., Langerman, C., Brookes, M.,(2005, p3)) says:-

While our research and analysis both focus on charities, they are always underpinned by the principle of maximising benefits for the people they serve. In the language of the charitable sector, this means that NPC focuses on outcomes.

That's outcomes rather than impact.

This confusion between “outcomes” and “impact” (whether intentional or not) is a barrier to pure impact reporting for charities – as will be seen in the survey below – in that the use of “outcome” reporting (or even just “output” reporting) becomes a common (and seemingly accepted) substitute for impact reporting, being easier to define and measure (particularly in terms of Financial Management).

The question framed here are when looking at current practice is:-

- Is “impact” measured in outcome (and output) statistics only?

3. Challenges

The support by the government of an independent “third” sector delivering public service is an explicit acknowledgement that the services delivered by a responsive third sector, whose interests are more closely aligned to the beneficiaries, is a more effective way of delivering service than by state administration. The dilemma comes in “who sets the agenda” and hence who measures the impact. Much of the long term measurement of impact, if left to the government, will be aligned to the government's agenda. The measurement of impact, if it is to maintain alignment to beneficiaries needs, surely needs to be done by those closest to the beneficiaries. Which, for individual charities, is obviously easier said than done.

The fundamental problem with reporting impact is summed up by Dees and Anderson, ((2003:7) from Haugh, March 2005, P 9). In summary, social benefits are often:-

“..intangible, hard to quantify, difficult to attribute to a single organisation, best evaluated in the future and open to dispute”

Each charity is different, has a different set of objectives, works in a different sector, and undertakes different types of work. How can impact be measured in a way that allows objective, fair comparisons? Does Impact assessment have any universal characteristics?

Two comments illustrate the problem, both quotes taken here from Barman (Voluntas 2007/18, p104):-

The task of assessing performance in the voluntary sector is complicated by the absence of a single and shared criterion for success (Kanter & Summers, 1987).

...lack of any suitable overall performance measure analogous to ‘return on capital’ in industry” (Handy, 1981, p.3).

There is no such universal or simple measure in not for profits organisations as, say, Return on Capital, and the goal of charities is not to maximise returns. But is it, hence, reasonable to derive a similar universal for the charity position to say their “goal “is to maximise impact?

There are a number of obstacles to impact measurement. Wainwright (2003, in Moxham, C., Boaden, R., 2007, p832) sets out the main ones:

- *the difficulties in identifying a causal relationship between a particular activity and a particular outcome;*
- *the difficulty for organisations whose main purpose is the prevention of something (for example, teenage pregnancies) to demonstrate positive impacts;*
- *the availability of baseline data; the applicability of using qualitative or quantitative data;*
- *attitudes to measurement; diversity of the sector; and cost*

Moxham, C., and Boaden, R., go on to say (2007, p833):

Regardless of terminology, a further challenge in terms of measuring performance within the voluntary sector is cited as timescale

In other words what to measure and over what time frame. The time frame question is linked to any investment proposition, and is intractable as attribution and causality, unless the project is entered into with a specified a time-scale criteria.

The questions framed here are when looking at current practice are:-

- Are causal links made?
- Is a timescale mentioned?

4. Objectives and Decision making

As already mentioned, Hind sees the link between Objectives and Impact to be fundamental - (for instance, one could argue that without an impact assessment, can charities make a Public Benefit statement?).

The question then becomes how do charities manage the link between their objectives and their impact. What decision criteria are they using in strategic, project and planning evaluation to ensure effective resource allocation (whether one assumes “maximising impact” is an implicit aim or not). These prioritising and choice criteria ought to be consistent with the impact measurement criteria. Are they being captured and reported? Transparency would at least offer some insight about the impact sought and the route taken.

Paton (2003, p37) says:

Measurement expresses and encourages an approach to decision-making based on facts and analysis, rather than anecdotes and opinions, not to mention wishful thinking and self-serving claims

The charity sector supply-chain, from Funders' to Implementers', will have a number of decision points in it. The Funders make decision about their aims and what projects they will fund to reach them; the implementing charities make decisions about their aims and what

projects they will implement to reach them, and there is congruence when a funder decides to fund a particular project.

Ideally transparency of each stage of the decision process should be available. But to get funders decisions aligned to implementer's decisions would require such a high degree of co-operation as to be unrealistic.

And any explanation of the feedback loop that feeds into and informs the decision criteria would also be make a closer link in the chain from objective to impact.

The questions framed here are when looking at current practice are:-

- Is the link to the charities objectives clear?
- Are decision criteria mentioned?

5. Impact Measurement tools and techniques

5.1 Performance measurement

In there paper on performance measurement Moxham, C., and Boaden, R.,(2007, p834) comment that:-

The literature reveals a dearth of empirical evidence about how voluntary sector performance is measured

Performance measurement, at least operational performance, has a number of tools available. How widely they are used is perhaps questionable. The balanced scorecard (Kaplan and Norton, 1992) for example, makes explicit reference to its applicability to voluntary organisations. There are various Quality models (such as PQASSO and TQM) which tend to on efficiency of outputs..

Benchmarking is an external focussed evaluation. But this is about requiring comparability. And any benchmarking could merely highlight incomparability of structure and resource, not effectiveness.

The real question is whether charity KPIs reflects their impact aims? If they don't, then they aren't substitutes for pure impact reporting.

5.2 Impact Measurement

The actual impact measurement techniques seem to be in much shorter supply than the writings about impact reporting.

A range of measurements are suggested by McCarthy, K., (2008, p114) – including:-

- *Experimental or quasi-experimental impact evaluation*
- *Self evaluation / performance monitoring*
- *Individual tracer studies(following users)*
- *Case studies*
- *Theory-based evaluation*

Case studies are obviously a well used method for publicising charities works. Though if used in isolation give little real information.

5.2 SROI.

Social Return on Investment (SROI) is an attempt to find a universal measurement of performance. In theory it is a simple ratio of the net present value of benefits to the net present value of investment.

Jeremy Nichols (2008, p117), Director at SROI UK defines SROI as:

“... a measurement approach developed from traditional cost-benefit analysis, in which the social and environmental impacts of an investment are given financial values.”

Simple until you attempt to quantify in monetary terms the net present value of benefits. And over what time period.

SROI also introduces an area of performance consideration often given low prominence in the sector, that of risk.

The Office of the Third Sector (OTS) have funded a three year program starting in 2008 on measuring social value. The contributors' to this study include the SROI network. The OTS have also issued an SROI guide the purpose of which is to standardise practice, develop the methodology and provide more clarity on the use of SROI.

Although there has been much prominence given to SROI, it is interesting to note that one of its proponents, the US foundation REFD, have issued a paper distancing themselves somewhat from it, and highlighting some of its weaknesses. These include attribution and causality problems and also complexity and cost of analysis.

The questions framed here when looking at current practice are:-

- Are any tools or techniques for measuring impact mentioned or used?
- Feedback, surveys and focus groups
- Is any benchmarking mentioned?
- Are [there] Case Studies used [linked to these statistics]?

6. Who's the report about?

Ian Bruce, in advocating effective charity marketing, says (1994, p112):

In particular it helps charities to act more responsible and effectively in meeting the needs of beneficiaries...

He goes on to say (1994, p133):

A marketing approach must permeate the whole organisation if it is to succeed

Although these ideas are in the context of marketing, not impact – it promotes the idea that impact reporting should be about the beneficiaries themselves. By definition impact reporting should be about the changes made to beneficiaries. But is the focus of current impact report

self-consideration or beneficiary consideration. Is the organisation attempting to justify its effectiveness, or is its “effectiveness” subordinate to resultant beneficiary impact?

Clearly a charity needs to include in its impact reporting some degree of self-analysis, including attempting to show causality. But there is a spectrum between the subject of the report being purely the organisation at one extreme, and the subject of the report being purely the beneficiaries at the other. And outcome / output reporting would tend to be the characteristics of a report at the “organisation” focus end, and impact at the “beneficiary” focus end.

The question raised here are when looking at current practice is:-

- Is impact from the stand point of the beneficiary covered other than by case study

7. And who is it for?

This seems to be to be an often overlooked , but very significant, question. Commercial companies Annual Reports are for investors and would be investors primarily. Any other reader must accept that the content and format are for the investor community.

But who is the impact report for? Do different readers demand different information? And if so, who has the final say on content? Is it for internal performance assessment? For past funders? Future funders? And is that institutional funders or the general public? What about beneficiaries? Third parties? Staff and volunteers? Others? If Impact Reporting dos make it into regulation, then the content will be determined by regulators.

Currently there seems to be a free hand for contenct and format of Impact Reports, but it is worth asking the question “whose it intended for” in doing a brief survey. Perhaps institutional funders should start to dictate some best practice.

8. Analysis

8.1 *The aim*

The aim was to look at current practice for impact reporting and to see what methods charities are using, linking back to the principles set out in the earlier sections.

8.2 *The sample (see appendix 1)*

The sample is of 26 charities. There are 15 that currently produce separate impact reports, so they were self selecting. Another 12 larger charities were chosen at random to see how they report impact (i.e. in their Annual Reports).

For each of the charities the Charity Commission Summary Information return (SIR) has also been looked at. In particular the answers to the question on the return “how does your charity measure the success of the strategy” has been fed into the survey (see appendix 2).

8.3 *The questions*

From the preceding narrative, a number of questions arose as indicators of impact reporting. In the absence of agreed structure or format of impact reports, and with few strong

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recommendations of best practice, it is a series of questions that can only point to areas where there are common practice, and areas where there is less adherence to the principles behind impact reporting.

The questions are set out in the findings section below.

8.4 *The findings*

A simple scoring mechanism was applied. 2 point if a charity is fully responding to one of the above questions, 1 if partially responding, and 0 if no response. So if any question was being fully covered by all charity reports it would have a 100% response.

1. Separate Impact Report	15
2. Is the link to the charities objectives clear?	44%
3. Is impact from the stand point of the beneficiary mentioned other than case studies?	6%
4. Are causal links made?	8%
5. Has a baseline been made?	0%
6. Are timescales mentioned?	8%
7. Are decision criteria mentioned?	8%
8. Is “impact” measured in output and outcome statistics only?	81%
9. Are there Case Studies linked to these statistics?	44%
10. Are any tools or techniques for measuring impact mentioned or used?	23%
11. Feedback, surveys and focus groups?	15%
12. Is any benchmarking used?	0%

There are areas that are quite well covered. Outcome and output reporting is favoured by most reports. (Though heavy use of outcome and output statistics, as has been discussed, is not really a sign of a pure impact reporting).

Some linkage to objectives (though this might just mean re-stating them at the beginning of the report) and the use of case studies are relatively common in the reports.

The mention of any other performance criteria is surprisingly limited, and the use of feedback and surveys even less so. Some reference is made to the use of KPI's (though often not explained. And one charity did mention the Balanced Scorecard.

But other areas that are very much less tackled are any reference to Beneficiaries other than case studies, causal links from the charities work to impact, timescales (other than reference to X year strategic plans) and decision criteria.

There are interesting exceptions to this. The British Film Institute and CARE both set out their priorities (i.e. give some pointer to their decision criteria), though not why they have made these priorities.

And base-lining and benchmarking are totally absent from these reports. Base-lining is a particular omission, though does raise the issue about how often should charities produce impact reports. To produce a yearly report is somewhat arbitrary. Impact is a simple formula – this is where we are, this is where we want to get to (or, this is where we are, this is where we were at), which doesn't necessarily fit well in a neat annual snapshot review.

9. Conclusion.

One obvious point about the reports looked at are that many are merely publicity “brochures”. (Some are actually just Annual Reports with a different name). It is difficult to know who they are aimed at, other than perhaps the general public.

They are all written from the point of view of the charity, reporting what the charity has done in the past year, not how the beneficiaries have benefited. Only the overseas aid charities get close to writing reports that come from the beneficiary viewpoint. Many of them are actually activity reports. Any link to impact is for the reader to infer. Impact reporting must surely start with those for whom impact is intended.

Impact reporting is a subject well disposed to rhetoric and theory, but which seems not to link easily to practice. There are many reasons for this, not least of which is that charities all have different natures. A hospice that exists to provide high quality care to its residence can quantify impact in simple metrics. Its impact can be likened almost to a service contract. A disaster relief aid charity, on the other hand, works by responding to events. To ask about impact would almost seem to miss the point.

The question that is waiting to be answered though is “Why”? Why have we done these activities rather than any others? Why do we think doing this is the most effective way to achieve our objectives? And how do we tell you, the report reader, why we do what we do?

From this simple survey it would seem that true impact reporting is still a theoretical hope, and there seem to be a long journey to overcome practical issues before it arrives at general good practice.

	1	2	3	4	5	6	7	8	9	10	11	12	
1. Seperate impact report													
2. Link to Objectives													
3. Beneficiary impact ex case study													
4. Causal links													
5. Baseline													
6. Timescale													
7. Decision Criteria													
8. Outcome / Output reporting													
9. Case Studies													
10. Other methods, KPIs etc.													
11. Feedback, surveys and focus groups													
12. Bench-marking													
Charity	1	2	3	4	5	6	7	8	9	10	11	12	available at:-
ACEVO - Impact Report 2008	2	1				1		2			2		https://www.acevo.org.uk/index.cfm/display.../About_acevo_impact_report
Arthritis care - Impact report 2007	2	2		1		1		2	2		2		http://www.arthritis.org.uk/AboutUs/Corporateinformation/ImpactReport
Cardinal Hume Centre - Impact Repotr 2008	2							2	2	1	2		http://www.cardinalhume.org.uk/editorial.asp?page_id=241
CRISIS - Impact Report 2007/8	2	1				1		2	2				http://www.crisis.org.uk/page.builder/annual-report.html
The Civil Service Benevolent Fund - Impact report 2008	2							2	1				http://www.crisis.org.uk/page.builder/annual-report.html
Epilepsy Action - Impact report 2008	2	2						2	1	1			http://www.epilepsy.org.uk/impact/index.html
NDCS - Impact report 2007/8	2	1	1					2		2	2		http://www.ndcs.org.uk/about_us/impact_report_accounts/impact_report.html
NSPCC - Impact Report 2008	2	1						2	1	2			http://www.nspcc.org.uk/whatwedo/aboutthenspcc/annualreport/impact_report_2008/index.html
RCGP - Impact report 2007	2	1						1		1			http://www.rcgp.org.uk/PDF/corp_impact_report2008.pdf
Refugee Council - Impact Reprot 2007/8	2							2	2				http://www.refugeecouncil.org.uk/about/impact.htm
RNID - Impact report 2007	2	1						2	2				http://www.rnidimpact.org.uk/hearingaids.html
St Anns Hospice - Impact Report 2007/8	2	1						2	1				http://www.st-anns-hospice.org.uk/document-library/impact-report-2007-8
Volunteering England - Impact report Iss 3 July 2007	2			1				1	1				http://www.volunteering.org.uk/WhoWeAre/About+Volunteering+England/about-us.html
WRVS- Social Impact reprot 2008	2	2	2	2						2			http://www.wrvs.org.uk/inside.aspx?page_id=414
Action Aid- Annual review 2007/8		1						1	1				http://www.actionaid.org/main.aspx?PageID=176
Age Concern - rept of the Trustees 2007/8	1	2					1	2		1			http://www.ageconcern.org.uk/AgeConcern/annual_report.asp
British Film Insitute - Annual review 2007/8		2					1	2					http://www.bfi.org.uk/about/review.html
Care International - Annual Review 2008	2	1					1	2	2	2			http://www.careinternational.org.uk/10250/annual-review-2008/
Disability Living Foundation - Annual review 2007/8		1						1					http://www.dlf.org.uk/about/
Joseph Rowntree - 2006-8 Triennial report								2					http://www.jrct.org.uk/
Scope - Annual report and Accounts 2007/8		1				1		2	1				http://www.scope.org.uk/downloads/publications/ScopeAnnualReport0708.pdf
United Response 0 Annual Review and Impact report 2007								1	2				http://www.unitedresponse.org.uk/what-we-do/about-us/annual-review.htm
Weldemar Hospice Care Trust - 31st march 2008								1					http://www.weld-hospice.org.uk/about-us/latest-publications/impact-report-2007-2008/
The Wolfson Foundation AR 2007/08		1					1	1					http://www.wolfson.org.uk/publications.htm
World Vision	1	1						2	2				http://www.worldvision.org.uk/server.php?show=nav.2207
Leonard Cheshire								1					http://www.lcdisability.org/?lid=27
Total	23	3	4	0	4	4	42	23	12	8	0		
% complete	44%	6%	8%	0%	8%	8%	81%	44%	23%	15%	0%		

Charity	SIR:- "How does your charity measure the success of the strategy
ACEVO	Our strategy contains key performance indicators which measure our success in implementing each objective in the plan. These include: <ul style="list-style-type: none"> • 70% of members say they are satisfied or very satisfied with ACEVO by 2011 • Double membership numbers in the North of England by 2011 • Perception audits of key stakeholders indicate a strong association of acevo with the code by 2011
Arthritis care	Level of increase in the public profile of the Charity Expansion of the pool of members Level of increase in external investments and collaborations with institutions Level of demand of the services we provide Level of influence we exercise over governmental policies Level of concentration of our branches throughout the UK, Wales and Scotland
Cardinal Hume Centre	This is based on both quantitative and qualitative factors. We monitor the number of clients we support and interact with and also monitor outcomes, to assess the success of our services. We will also continue the external reviews of our services and our surveys of what our clients think.
CRISIS	The externally focused objectives form the basis of annual operational plans with targets for each department that in turn allows us to measure our progress towards meeting these strategic objectives. The trustees of the organisation review progress quarterly and annually. We are in the process of reviewing and developing improved monitoring and evaluation systems for all of our services.
The Civil Service Benevolent Fund	Registered as a Friendly Society
Epilepsy Action	Impact assessments and reports.
National Deaf Childrens Society	by employing effective evaluation tools and impact measurement; by working towards and achieving accredited quality marks; by consultation with beneficiaries, partners and others working in the field; by the evidence of the charity's lobbying and campaigning influencing government policy.
NSPCC	The success of the strategy is measured through: <ul style="list-style-type: none"> * the review of the annual corporate business plan * the performance framework which contains high level measures of impact along with strategic and performance indicators which are monitored by the Leadership Group and the Board of Trustees * Functional strategic indicators monitored by the functional directors * An annual performance report that includes key statistics from within the organisation and from government.
RCGP	The College's strategic plan looks to developments over a three year period, which are regularly reviewed and adapted in light of experience and feedback from the membership and patient representation. The success of the strategy is evidenced throughout the Colleges Impact Report.
Refugee Council	The Refugee Council will complete its current strategic plan at the end of March 2009 and will launch a new strategic plan which runs from 2009 to 2012. Each year the charity develops annual operational plans which work towards achieving the over-arching strategic objectives (above). The Chief Executive compiles a bi-monthly report for the Board of Trustees providing updates on current issues and how these relate to the strategic plan. These reports are considered in detail at Board meetings.
RNID	Through quantitative and qualitative success measures as summarised and presented in the Annual Impact Report
St Anns Hospice	Excellent Inspection Reports from the Health Commission Clinical Audit that demonstrates measurable improvement National Patient Satisfaction Survey Charter Mark and Investors in People accreditation Financial Reporting Systems which provide timely information on financial operations.
Volunteering England	Volunteering England publishes periodic Impact Reports during the year to report on its activities and achievements which can be downloaded from its website at www.volunteering.org.uk . The charity is currently developing a framework for a much more comprehensive Social Audit which will capture the full range of benefits resulting from its work.
WRVS	We set and monitor key, high-level performance indicators for our strategic objectives and aims. Underneath these are sets of measurable, organisational, departmental and team objectives, expressed in ways that demonstrate collaborative working internally and externally and which have detailed performance indicators. Departmental and team objectives are translated into individual objectives for individual performance management. We will also build on our statement of beliefs to develop an agreed set of behaviours for WRVS, a range of service quality standards, together with supporting strategies, policies on efficiency, performance pay, equality and diversity etc, and a plan to embed these and enable achievement to be monitored.
Action Aid	Using ActionAid's Accountability Learning and Planning System (ALPS) we assess progress against our goals, actions and priorities, and have organisation-wide objectives, strategies and action plans. ALPS also requires ActionAid's work to be independently reviewed at all levels every 3 to 5 years.
Age Concern	N/A
British Film Institute	In its business plan the BFI includes a set of challenging targets and key performance indicators that will help us monitor success. We are measuring our achievements in terms of impact and audience reach.

Charity	SIR:- "How does your charity measure the success of the strategy"
Care International	Firstly, the Trustees and Management Team set key performance indicators and targets to ensure our strategy is correctly implemented and action can be taken if this is found not to be the case. Secondly, to understand our global impact we use impact monitoring tools. In terms of measuring our impact on addressing global poverty, we have five core categories against which we measure. Benchmarking activities are built into the design and implementation of our work to ensure we are able to constantly monitor progress and adapt when needed. We will regularly commission focused, technical appraisals of our work. We also use internal audit to guarantee the quality of our work and ensure we are effectively delivering our strategic objectives.
Disability Living Foundation	<p>Number of calls and e-mails received by the helpline</p> <ul style="list-style-type: none"> - Number of visitors to our Equipment Demonstration Centre - Number of Hamilton Directories sold - Number of people attending our training courses - Number of people attended DLF Moving and Handling People event - Number of products/suppliers updated
Joseph Rowntree	The work of each committee is reviewed annually. The work of the whole Trust is reviewed through the Trust Secretary's annual report. Regular programme area reviews are performed, occasionally using external evaluators. Regular contact is maintained with grantees & annual reports & financial accounts are received from larger & multi-year grantees. In their closing letter grantees disclose whether the objectives of the work supported changed at all, what was achieved & what were the most successful & unsuccessful aspects of the work. The Trust constantly scans the political environment for external assessment of how grantees are influencing policy & standards of good practice. Trustees meet with & have dialogue with applicants.
Scope	<p>We have a framework for performance management across the whole of Scope using the balanced scorecard - a method of measuring and managing performance that is increasingly popular within the voluntary sector and already well established in the private sector. Each department has developed Key Performance Indicators to measure its progress in achieving its planned activities, which in turn link to Scope's strategy and mission.</p> <p>Our business plan for 2008/09 has been developed to feature a series of key targets for each strategic strand and these will be reported against in full in next year's Summary Information Return and Annual Report and Accounts.</p>
United Response	<p>Locally we will measure our progress towards this vision through our person-centred planning process, in particular by using our values based tool, the Way we Work, which places each person at the centre of their life and helps staff to plan and organise appropriate support around them, to make sure they can live the life they choose.</p> <p>- Nationally we will measure our impact through a range of critical success factors, through specific internal and external surveys, focus groups and research and ongoing performance monitoring.</p>
Weldmar Hospice Care Trust	<p>We measure success through:</p> <ol style="list-style-type: none"> 1. Numbers of people accessing services in a timely way 2. Numbers being cared for in preferred place of care 3. Results of statutory inspections 4. Patient satisfaction measures (questionnaires and focus groups) 5. Clinical audit of our, and our partners', services
The Wolfson Foundation	Written progress reports and follow up visits by academic experts, members of the executive, building consultants.
World Vision	<p>Each strategic goal is reviewed and measured against key performance indicators in a quarterly organisation scorecard. Our programmes have regular reporting schedules and reviews, which are part of a longterm monitoring programme called LEAP (Learning through Evaluation with Accountability and Planning).</p> <p>LEAP uses a toolkit of Transformational Development Indicators, which mark and evaluate success. This process also identifies areas for improvement and includes time for reflection.</p> <p>There are also regular management reviews which measure and monitor organisational efficiency.</p>
Leonard Cheshire	By setting operational targets on an annual basis against this strategy. All operational objectives have to show how they contribute to the overall strategy.

Appendix 3

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