



SOCIAL
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TOOLS FOR SOCIAL CHANGE



WORKSHEET

SETTING MONITORING INDICATORS

A worksheet to help to identify performance indicators that can show if you are making good progress and achieving the things you hoped for.

THIS WORKSHEET WILL HELP YOU TO:

- ✓ IDENTIFY A SET OF INDICATORS THAT WILL BE USEFUL AND PRACTICAL TO APPLY
- ✓ SHOW HOW EFFECTIVELY YOU ARE DELIVERING YOUR WORK
- ✓ DETERMINE PROGRESS IN DELIVERING YOUR OBJECTIVES
- ✓ DEMONSTRATE THE EXTENT TO WHICH YOU ARE ACHIEVING YOUR AIMS



ABOUT THE WORKSHEET

So you're working to make a positive change in the world. But how do you know that your campaign, project or enterprise is on track? How do you know when your work is successful?

That's where good monitoring indicators come in.

Indicators are simply tangible signs that you are making progress and achieving the things you hoped for. They might be referred to as measures, metrics or indicators.

These indicators can help you to understand:

- How effectively you are delivering your work (your processes).
- Your progress in delivering your objectives (your outputs)
- To what extent you are achieving your aims (your outcomes)

Without indicators it is difficult to know what information you need to gather about your work and how to assess progress in an objective and consistent way.

This worksheet guides you through a five-step process for setting the right indicators.



SETTING INDICATORS

Follow these five steps to identify and test your monitoring indicators.

1. Describe the Change

So what change are you trying to make?

Start by describing as clearly as you can a single change, benefit, or other effect that you expect to bring about as a result of your work. For example, you might want to bring about sustained employment for a young person.

Description of Change

2. List Possible Indicators

Now identify a long list of possible indicators for the change you have described.

Think about the change and how you will know it is occurring. What would success look like? What signs or clues would there be that you are on track to achieve it?

Consider the following types of indicators.

Process indicators

Indicators of progress in carrying out work that will lead to the change. This could include take-up, waiting times, satisfaction, efficiency, quality, and so on. For example, the percentage of young people that choose to access a training opportunity.

Output indicators

Indicators that will demonstrate the amount and type of work that you do and that show progress towards meeting your objectives. For example, the percentage of young people that achieve a training qualification.



Outcome indicators

Indicators of changes that take place as a result of your work, and show progress towards meeting your aims. This could include changes in Behaviour, Attitude, Condition, Knowledge, or Status (BACKS) that you bring about as a result of your work. For example, the number of young people that remain in a job after 6 months.

Look to different sources for indicators. You can think up your own indicators, draw on standard indicators that others are using (see for example, www.globalvaluexchange.org), or include indicators that have already been set by your funders.

List all of the possible indicators you can think of at this stage.

3. Assess the Indicators

Now go back to the list of indicators you have identified.

There are no 'right' or 'wrong' choices, but we want to get to a set of indicators that are the right fit given your unique circumstances and the change you are working towards.

Discuss or score each of the possible indicators using the following criteria.

Realistic

The indicator should be practical to assess and lend itself to measurement within the time and skills available to you.

Relevant

The indicator should link directly to changes that are within your control and which really matter.

Valid

The indicator should be precise, enable consistent collection of data, and be credible to your audience.

Clear

The indicator should be simple and direct enough to show progress over a reasonable timeframe and be understandable to others.

Actionable

The indicator should lend itself to objective assessment and relate to clear and actionable results.



You can use the following table to make your assessment. Simply apply your chosen criteria to each indicator in turn. Add a check mark if the indicator meets the criteria or, alternatively, use a High, Medium, or Low rating for each.

Description of the Change:					
Possible Indicators	Realistic	Relevant	Valid	Clear	Actionable
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

4. Select Your Indicators

Consider your assessment.

Identify and rank the indicators that best fit the criteria. Is there a small set of indicators that get to the heart of the change you are trying to measure? Taken together, do these represent an appropriate mix and balance of indicators from different sources? Are there ways to narrow down or strengthen a core set of indicators?

List your final choice of indicators. It's best to have no more than three indicators for any single change you intend to bring about.



Selected Indicators:

- 1.
- 2.
- 3.

5. Test the Indicators

Once you have selected your indicators, it's a good idea to test them out.

Piloting the indicators will help ensure that:

- It is feasible to collect appropriate performance data
- The data make sense when set against the indicators
- The indicators prove useful over time
- Your audience develops a better understanding as a result

In light of the findings from the pilot, either confirm or modify the indicators.



FURTHER INFORMATION

Thanks for taking the time to check out this guide.

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