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Getting Started with Social Impact Measurement

Toolkit

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Introduction

This workbook brings together six practical templates that guide you step-by-step from defining the problem your organisation seeks to address, to presenting a one-page impact-measurement framework for funders and boards.

It is designed for busy teams that need to evidence impact without a large evaluation budget.

How to get the most from this pack

- Work through the templates in order. You will find an Impact Measurement Glossary at the end of the pack if any terminology is unfamiliar.
- Each worksheet builds on the last, so you finish with a coherent measurement system rather than disconnected documents.
- You will find guidance ahead of each template to explain its purpose, give completion tips and highlight common pitfalls
- Make sure to keep drafts - save dated versions or snapshots (PDFs or photos of whiteboards). They become a learning log showing how your thinking evolves.
- Involve colleagues and stakeholders - impact measurement is a team sport. Share drafts with frontline staff, volunteers and (where possible) your organisation's beneficiaries to check language, realism and blind spots.
- Set a review rhythm - revisit the completed templates every six months (quarterly for fast-moving projects) to update assumptions, targets and indicators.



Need some help?

If, like many fellow organisations, impact measurement is something you struggle with, then we can provide free support to Scottish social enterprises thanks to Scottish Government funding.

Support can include any of the following:

- A review of your current evaluation practices
- Identifying the problem you're solving
- Identifying key beneficiaries and stakeholders
- Building a logic model that links the problem/needs you address to activities, social, environmental and community outcomes
- Alignment to the local, national and international policy environments
- Creating an evaluation plan
- Using your impact measurement practice to inform strategy and communication
- Managing and analysing your data
- If you are interested in finding out more and securing some support for your organisation, apply now at the link below:



Alternatively, check for upcoming dates for our popular [social impact measurement course here](#) or [request access to our on-demand e-learning course here](#).

Template 1: Problem-Statement Builder

How to use this worksheet

- A sharp problem statement grounds your entire impact strategy.
- Complete each section in turn, keeping each response to one or two concise sentences.
- Use authoritative data (e.g. local authority statistics, published research) and avoid value-laden language like “crisis” unless the evidence supports it.

Section	Prompt
Context	Where and in what policy environment does the problem occur? Mention geography and any relevant legislation or trends.
Target Group	Who is directly affected? Be as specific as possible (age, gender, locality, circumstances).
Need	What facts prove the need exists? Quote figures, surveys or testimonies.
Root cause(s)	Underlying drivers that create or perpetuate the issue (e.g. lack of transport, systemic bias).
Magnitude of the problem	Quantify the scale (numbers affected, cost to society, environmental impact).
Consequences of Inaction	Describe what gets worse if nothing changes—social, economic, environmental costs.
Our organisational role/added value	Why are you well-placed to tackle this? Reference experience, networks or resources.

Tips

- Lead with numbers, follow with narrative.
- Check every claim can be traced back to an external source.
- If multiple needs emerge, pick the primary one to stay focused.
- Use authoritative data (e.g. local authority statistics, published research) and avoid value-laden language like “crisis” unless the evidence supports it.

1. Problem-Statement Builder

1. Context (geography, policy, trends etc.)

6. Root cause(s)

2. Target Group (who is the focus of your work/support?)

4. Magnitude of the problem (scale, numbers, estimates etc.)

3. Need (simple outline + evidence e.g. data points, studies...)

5. Consequences of Inaction

7. Our organisational role/added value

Template 2: Theory of Change Worksheet

How to use this worksheet

- A Theory of Change (ToC) maps the logic of your programme, showing how day-to-day activities lead to long-term impact
- Complete the six boxes in order, then sense-check the links between them.

Section	Prompt	Helpful questions
1. The Problem	Concisely restate the need you identified in Template 1.	<ul style="list-style-type: none">• What's the core pain-point?• Is it backed by data?
2. Beneficiaries	Name the specific group you aim to help.	<ul style="list-style-type: none">• Who experiences the problem first-hand?• Are any sub-groups excluded?
3. Activities	List the key services, products or interventions you will deliver.	<ul style="list-style-type: none">• Are these activities within your control and expertise?
4. Outputs	Tangible, countable products of your activities.	<ul style="list-style-type: none">• What can you count straight away (sessions, toolkits, tonnage diverted)?
5. Outcomes	Short- to medium-term changes for beneficiaries.	<ul style="list-style-type: none">• What evidence will show the change is happening?• Is the outcome realistic in the timeframe?
6. Impact	The broader, longer-term difference to society or the environment.	<ul style="list-style-type: none">• How does this align with Scotland's National Performance Framework or the SDGs?

Tips

- Work left to right: check each arrow feels credible; if not, flesh out assumptions or add missing activities.
- Note assumptions & risks in the margin (e.g. "Assumes partners refer 100 clients per quarter"). Review these every six months.
- Keep it to one page: a ToC is a communication tool, not a thesis.
- Use active voice ("We deliver training" instead of "Training is delivered") to make responsibilities clear.

2. Theory of Change Worksheet

1. The Problem

What specific problem, need or set of circumstances are you aiming to solve?

2. Beneficiaries

Who will have their situation improved through your work/ support?

3. Activities

What will you do to meet the needs of your beneficiaries?

Your Notes or Assumptions

6. Impact

What are likely to be the broader, longer-term impacts of your work?

5. Outcomes

What short-medium term changes do you aim to bring about via your activities?

4. Outputs

How will you count or measure your activities? E.g. no. of participants, training sessions, downloads etc.

Template 3: Outcome-Writing Worksheet

How to use this template

- Turn your Theory of Change into measurable outcome statements.
- Each row should read like a mini-sentence: “Young people increase their employment prospects, with 70 % in work within six months.”

Section	Prompt
Who (beneficiary)	State one group only; avoid “and/or”.
What (change)	Describe the capability, behaviour or condition that shifts.
Direction	Clearly state if aim is to increase or decrease. If maintaining is the goal, write “maintain”.
Scale & timeline	Add a numeric target and when you expect to reach it.
Notes / indicator ideas	Jot potential measures, baselines or data sources.

SMART Checklist

- **Specific** – Clear enough for an external reader to picture success.
- **Measurable** – Percentages, scores or counts, not vague adjectives.
- **Achievable** – Ambitious yet realistic given resources.
- **Relevant** – Directly linked to the problem statement.
- **Time-bound** – A defined end-point (date or duration).

Common Pitfalls

- Mixing multiple changes in one statement – split them.
- Using verbs like “support” or “enable” (they’re about activity, not outcome).
- Forgetting direction – state whether you want the metric to rise or fall.

3. Outcome-Writing Worksheet

Complete the WHO --> WHAT --> DIRECTION (+ scale & timeline) chain for each of your priority outcomes along the lines of the example below.

Priority #	Who (beneficiary)	What (change)	Direction (< increase / > decrease)	Scale & Timeline	Notes / Indicator ideas
1	Young people (16-24)	Employment prospects	<	70 % in work within 6 months	Use HMRC employment data + follow-up survey

Template 4: Indicator Matrix Worksheet

How to use this template

- Use this worksheet to translate outcomes into concrete evidence you can collect.
- Aim for at least one hard (objective) and one soft (subjective) indicator per outcome.
- Hard indicators typically come from reliable third-party data (e.g. HMRC payroll records, NHS referrals).
- Soft indicators capture perception or behaviour change via self-report surveys, interviews or observation.
- Well-crafted indicators are SMART – Specific, Measurable, Achievable, Relevant and Time-bound. If an indicator fails one of these tests, refine it or choose an alternative.

SMART Checklist

- **Specific** – Clear enough for an external reader to picture success.
- **Measurable** – Percentages, scores or counts, not vague adjectives.
- **Achievable** – Ambitious yet realistic given resources.
- **Relevant** – Directly linked to the problem statement.
- **Time-bound** – A defined end-point (date or duration).

Tips

- Keep data-collection frequency realistic – a quick quarterly check-in beats a perfect annual survey that never happens.
- Use colour-coding (e.g. green = on track, amber = needs attention, red = off track) once data start flowing in.
- Record a responsible person to create accountability for each indicator.

4. Indicator Matrix Worksheet

Outcome	Hard evidence (e.g. admin data)	Soft self-report	Soft observed	Data source(s)	Frequency	Responsible
<i>Young people gain employment</i>	<i>Number securing PAYE employment</i>	<i>% reporting improved job search confidence (Likert-scale)</i>	<i>Facilitator observation of interview-skills role-play</i>	<i>HMRC employment check, post-programme survey, session notes</i>	<i>6-month follow-up</i>	<i>Employment Advisor</i>

Template 5: Impact-Measurement Framework

How to use this template

- Use this worksheet to bring together everything you’ve produced so far—mission, problem, activities, outcomes and indicators on one page.
- Ideal for board packs, funder applications or dashboards.

Section	What to include
Mission	Your organisation’s enduring purpose (one or two lines).
Problem statement	Paste the refined statement from Template 1.
Core activities	List your headline services or interventions (3–5 max).
Outputs	Quantifiable deliverables (e.g. workshops run, meals served).
Outcomes	The final list from Template 2, in priority order.
Indicators & data sources	Pair each outcome with its hard & soft indicators plus collection method from Template 3.

Using the Framework

- “RAG-rate” columns quarterly – green (on target), amber (watch), red (off target).
- Circulate to staff before strategy days; ask them to flag evidence gaps.
- Copy the “Indicators & data sources” column into grant bid monitoring sections to save time.

Maintenance

- Schedule a review every six months to update indicators, add new activities or adjust targets.
- Archive previous versions to track how your measurement approach evolves.

5. Impact-Measurement Framework

1. Mission

6. Outputs

2. Problem statement

4. Outcomes

3. Core Activities

5. Indicators & data sources

7. Our organisational role/added value

6. Social Impact Measurement Glossary

Helpful terminology for planning, monitoring and evaluating social impact projects in Scotland and beyond.

Term	Definition	Term	Definition
Attribution	The extent to which observed outcomes can be linked directly to your intervention rather than external factors.	Indicator	A specific, measurable sign of progress towards an outcome (quantitative or qualitative).
Baseline	Data that describe the situation before an intervention begins, used as a comparison point for measuring change.	Inputs	The resources invested in an activity, such as money, staff time or equipment.
Beneficiary	A person, group or organisation that experiences change (positive or negative) as a result of an activity.	Key Performance Indicator (KPI)	A high-priority indicator selected to track ongoing organisational performance.
Counterfactual	An estimate of what would have happened to beneficiaries in the absence of the intervention.	Learning	Using evidence and reflection to improve strategy and delivery; the “L” in MEL (Monitoring, Evaluation and Learning).
Dashboard	A visual display (often digital) that summarises key metrics and trends in real time.	Logic Model	A diagram that links inputs, activities, outputs, outcomes and impact in a linear chain.
Deadweight	The proportion of outcomes that would have occurred anyway, without the intervention.	Mixed Methods	An evaluation approach that combines quantitative and qualitative data collection and analysis.
Displacement	When positive outcomes in one area cause negative outcomes elsewhere (e.g. jobs moved between regions).	Monitoring	The routine, systematic collection of data on specified indicators during programme delivery.
Drop-off	The rate at which an outcome reduces over time after the initial change has occurred.	National Performance Framework (NPF)	Scotland’s national set of wellbeing and economic indicators that track progress towards national outcomes.
Impact	The broader, long-term change for people, communities or environments that results from outcomes.	Outcome	The short- or medium-term change experienced by beneficiaries because of an activity.
		Output	The immediate product or service delivered (e.g. workshops run, meals served).

Social Impact Measurement Glossary (Cont.)

Term	Definition
Participatory Evaluation	Approaches that actively involve stakeholders—especially beneficiaries—in designing and conducting evaluation.
Proxy Indicator	A measure that substitutes for another indicator when direct measurement is not feasible.
Qualitative Data	Non-numeric information (e.g. interview quotes, observations) that captures depth and context.
Quantitative Data	Numeric information (e.g. survey scores, counts) that allows statistical analysis.
Reliability	The degree to which a measurement tool produces consistent results over time and across users.
Sample Size	The number of respondents or observations included in a study; affects statistical confidence.
Scottish Index of Multiple Deprivation (SIMD)	A national ranking of small areas based on relative deprivation across multiple domains.
Social Return on Investment (SROI)	A framework that assigns monetary value to social, environmental and economic outcomes.
Stakeholder	Any individual or organisation with an interest in, or affected by, the intervention.

Term	Definition
Sustainable Development Goals (SDGs)	Seventeen global goals adopted by UN member states to end poverty, protect the planet and ensure prosperity.
Theory of Change	A comprehensive description of how and why an intervention is expected to lead to desired impact.
Triangulation	Using multiple data sources or methods to cross-check findings and improve validity.
Validity	The degree to which a tool or method measures what it claims to measure.
Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS)	A 14-item scale widely used in the UK to measure mental-wellbeing outcomes.
Wellbeing Economy	An economic approach that prioritises human and ecological wellbeing alongside traditional economic growth.

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