



Demonstrating Value Workbook

Appendix A: Snapshot Content Ideas by Category

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Cross Cutting – Community Impact

We address an important and meaningful community issue	Indicators drawn from research about the issue that shows the need
	Quote highlighting the seriousness of the problem
	Anecdotes/ quotes from people that highlight the challenge / issue area
	Images that highlight the challenge/issue/success area
We connect individuals to resources according to their needs	Illustrative example that shows this
	Profile of individual who benefited from services /program
We provide benefits that exceed those offered elsewhere	List of benefits of particular program/service/product
We reduce (taxpayer, public) costs to deliver the same or better outcomes	Example that illustrates the difference in the cost of your alternative relative to standard practice
	Social Return on Investment or Cost Benefit Analysis
We know that our message is being heard; We are influencing policy change	# of media coverage events, # of photos in paper
	changes in rhetoric, position and actions of those you are targeting with your advocacy efforts
We provide useful and relevant resources	# resources accessed on the website
	# resources shared by users (via social media from website)
	List of top 5 search terms
	List of top 5 resources accessed
We serve the needs of other programs within our organization and community	# Unique referrals to our website
	Top 3 community referral websites

We connect individuals with programs and services according to their needs	Figure that shows connection points
Many people benefit from our services	# persons served (could be broken down by gender, age, other sub-groups, service received)
	# persons that are served by multiple services
We meet needs relative to service demand	Demand projection for program
	\$ (estimated) Investment needed to meet demand
	# services provided (overall, per person)
	# estimated cases (by area, by year)
We reach people beyond the core service area	% increase clients/participants outside of area of operation
We attract people to our Website	# visits to website
	# visits to specific sections of website
We improve knowledge about a practice and/or issue	% cumulative average change in scores (test scores, self-reported, observed)
	# people who complete workshop/course/training opportunity
Individuals, households...(etc.) put into practice what they've learned	Quotes from participants that highlight achievements
	Examples of Pledges and Actions undertaken
Participants appreciate the program	% participants who recommend program
We influence the standard of practice	# cases where alternative replaced standard practice

You may also be interested in the following DV tools, resources and blogs on the DV website:

[Impact Mapping Worksheet](#)

Supportive Employment

We create meaningful and appropriate work opportunities (to match needs)	job positions created (total, and full-time equivalent positions)
	total hours of employment
	list of barriers to employment identified by employees
	profile of individuals (gender, age, residence, income)
	# persons employed (or self-employed)
	# hours of work provided (total and avg/person)
	profile of work opportunities (skilled vs unskilled)
We balance the mix of target and non-target employees to support both our mission and business	% employees from target population
	ratio of hours worked by employees from target population/ to total hours worked by all employees
We accommodate and support the needs of employees	% employees on long-term sick leave
	% individuals that are connected to other supports (both internally/externally)
	# Interactions by Support Area or # Community Referrals
	% individuals that have completed training this year, by type of training
	\$ support costs per individual per year
	# (avg) scheduling changes per employee
	List of supports provided directly to employees
	% employees transitioned to work/school
	% individuals with wellness plans

	examples of individualized supports and training (can use a figure to illustrate)
We increase the financial independence of individuals	\$ pay/wage/income pre- vs post training
	\$ average hourly wage and benefit coverage (can also compare this to the industry standard)
	\$ Income generated (total, avg per person)
	Average wage
Individuals become engaged and stay connected to the social enterprise	Average length of time involved with the social enterprise OR Training completion and placement rate
	# long-term client employees (>2years)
	# employees who left, by reason for leaving
	# employees by duration of tenure
	Retention rate
Individuals who stabilize their lives and develop important skills, abilities and competencies	Quotes from individuals that highlight achievements
	# (and/or %) of employees who assume more responsibility and/or hours
	List of skills and capacities gained
	% increase in listed skills and capacities
	'open' narratives that speak to increased stability, independence, quality of life
	# Individuals who left to pursue a new opportunity that builds on their experience

	examples of life changes and 'livelihood assets' developed. One method to draw on could be the Sustainable Livelihood Asset framework or the Most Significant Change framework.
Individuals have an improved quality of life.	Quality of Life Scale (Examples of scales: Multi-purpose: Short Warwick- Edinburgh Mental Well-being Scale; Health focused: SF-36 / SF-12, and WHOQOL-BREF; Social Services: GENCAT Scale)
	share of people who report that they are "satisfied or very satisfied" with their lives

You may also be interested in some of the following tools, resources and blogs on the DV website that relate to supportive employment:

- [Employment Support Tracking Tool](#)
- [Maintaining Privacy and Confidentiality](#)
- [Showing the Value of Supportive Employment](#)
- [Supportive Employment Positions Tracking Tool](#)
- [Sustainable Livelihoods Assessment](#)
- [Shared Impact Map and Societal Cost Calculator](#)
- [Quality of Life Tools](#)

Transforming the Lives of Individuals

We accurately assess needs and provide appropriate support	# assessment errors
	staffing ratio (e.g. # clients per staff)
We reach people in a timely way	# delays in support
We understand the challenges and needs of the population we serve	Diagram that illustrates the uniqueness/appropriateness of the intervention model
We reduce the level of stress for individuals and their families	Anecdotes / quotes from focus groups and studies that highlight areas of achievement
We see individuals who stabilize their lives and develop important life and work skills	List of skills and capacities gained
	% increase in listed skills and capacities
	Quotes from individuals that highlight achievements
We are successful in engaging people in our enterprise/ initiative	# of spots (positions) available
	# of people served / # participants
	average length of time involved
	Demographic information of those who you engage
	completion (and placement rate)
We connect people to other supports	# of referrals by type of referral
	% of people that followed up
	% that found referral useful
Individuals in our program/enterprise are actively engaged in it.	% of people that access a support
	Feedback about engagement in activities, events

We are supporting participants in issue areas that are meaningful to them	# of interactions, by topic area
Individuals building skills, abilities and competencies	List of skills (and perhaps frequency of attainment)
	List of qualifications and certifications (and perhaps frequency of attainment)
	# Individuals who increased their level of engagement and responsibility in the enterprise/ program
	# of individuals who leave to pursue a new opportunity
Individuals are moving beyond 'survival mode' to greater stability and independence?	Use of public and other community supports and services
	# of people that somebody can rely on for support in times of need
	Self-efficacy scales (Belief in yourself that you can do something)
	ID in possession by type of ID
	Monthly income
	Examples of life changes
	Retention rate/ absenteeism rate
Sustainable Livelihoods (A framework to understand what 'assets' an individual has (not just financial), and how they are developing these 'assets' further to escape poverty on a sustainable basis.)	
	Share of people who report that they are "satisfied or very satisfied" with their lives

Individuals improving their well-being / quality of life?	Quality of Life Scale (Examples of scales: Multi-purpose: Short Warwick- Edinburgh Mental Well-being Scale; Health focused: SF-36 / SF-12, and WHOQOL-BREF; Social Services: GENCAT Scale)
	Most Significant Change (An approach to systematically generate and analyze personal accounts of change and deciding which of these accounts is the most significant – and why)
	A case study that shows a particular situation in depth. This could be a person, a site, or a project. It often uses a combination of quantitative and qualitative data.
	Social Network Mapping /Personal Network Visualization (This is a graphic representation or visualization of an individual or a family's linkages to the larger social system including informal supports.)

Culture

Cultural Empowerment

We are empowering people to be proud of their cultural identity	Track the number of members from that culture who are meaningfully engaged in your program / social enterprise
	Survey those directly involved to establish the extent (if any) of changes in perceptions of themselves as members of the cultural group (cultural pride).
	Indicators that represent the strength and practice of culture in a community.
	Portray how community members interact with the enterprise/program (number and in what capacities).
We are improving general awareness and perception of our culture	Changes in public awareness surrounding the history, language, art, etc. of the cultural group, as demonstrated by media, survey or story.
	Actions in support of promoting/preserving the culture of particular cultural group.

Cultural Industries

The lives of the artists involved in our organization are improving	change in visibility / careers
	change in artist's revenues
	portion of local or alternative cultural content
We are reaching an audience with our work.	# participation / attendance / traffic (e.g. in a gallery)
	Feedback from short survey
	Media spots
	Number of activities / events held

We are providing a means for artists to develop their livelihood	number of artists, craftspeople or performers who are associated / work for the enterprise
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You may also be interested in the following DV tools, resources and blogs on the DV website:

[Tracking Cultural Empowerment and Awareness](#)

[The Value of Art and Culture \(Blog\)](#)

Health

We accurately diagnose and provide appropriate services / treatment	description of diagnostic process
	# errors
	staffing ratio (e.g. # patients per staff)
We increase the skill and confidence of staff/caregivers	self-reported scores
We meet needs that are complex	% participants/patients with multiple chronic conditions
We reach people in a timely way	# delays in care
	Wait times (days)
We understand the challenge and needs of the population	Diagram that illustrates the uniqueness/appropriateness of the intervention model
We reduce the level of stress for individuals and their families	Anecdotes / quotes from focus groups and studies that highlight areas of achievement
We are improving Quality of Life	Changes in quality of life as represented by the use of Quality of Life assessment tools before and after the program's intervention
We are improving Health Outcomes	See Canadian Institute for Health Information's Health Outcomes Indicator (or your country's equivalent)
We are improving Health System Performance Outcomes	See Canadian Institute for Health Information's Health System Performance Indicators (or your country's equivalent)

Affordable Housing

We address critical housing needs in the community	description of who is will be housed by the project
	description of how intervention addresses gaps in a housing continuum
We improve the local economy	change in property values
	# jobs and spending generated from construction
We improve the mix of housing options in a community	change in the breakdown of housing in the neighbourhood (rental vs. ownership; housing prices)
We increase community Well-being and inclusion	community indicators relating to social, economic and environmental outcomes
	homeless count
We design and operate housing to facilitate community involvement, health and personal development	housing and neighbourhood quality assessment tools
Individuals and households are accessing housing and services and improving their housing situation	# of people/families placed in more stable housing
	# of different people/families receiving any housing loss prevention services
	# people/families who maintained housing for at least 3 months
	# of program referrals
Individuals and families stabilize their lives and improve their quality of life.	# people/families that transition to more stable housing (in housing continuum)
	case studies / narrative that illustrate transition
	quality of life survey tools

You may also be interested in the following DV tools, resources and blogs on the DV website:
[Showing the Value of Affordable Housing](#), [Narrative and Storytelling](#), [Quality of Life Tools](#)

Local Food

To make nutritious food accessible and available to all	# Meals prepared and served
	Number of Community Gardens
	Nutritional contribution of community gardening.
	# food retailers in a specific area
Local producers are better connected to local consumers	Number and location of Farmers Markets
	Number of farmers selling at Farmers' Markets
	# alternative retailers in a community (e.g., co-ops, farmers markets)
Local farmers improve their income	Gross receipts
	Ratio of Farm Business Operating Expenses to Gross Receipts (2000, 2005)
Stronger local food economy	# people employed in primary and secondary food industry
	Number and types of food processors
More farms adopt sustainable farming practices	# of organic farms
We see the preservation (and expansion) of farmland	total area of farmland in a region
	Agricultural Land Reserve Exclusion and Inclusions (BC specific)
	Availability of agricultural land to new farmers
	area of agricultural land converted to other uses
Local farming is viable and growing	# farms
	Average age of farmers

	# of farm operators
	Average farm size
	Number and percent of large, medium, and small farms
	Farming employment and income, including off-farm income
	Census of Agriculture Farm operators' income provided by farm types
	Total farm capital (market value \$)
	Extent of producers' debt

You may also be interested in Demonstrating Value's [Farmers Market Impact Toolkit](#)

Land and Resource Stewardship

We're improving land and natural resource use practices.	Practice Adoption rate (# or %)
	Certifications (# or %)
	Regulatory compliance (list of infractions)
	Reduction of undesirable practices (% reduction)
We are conserving natural areas.	Land conserved (km ²)
	Site Quality (list or mapping of ecosystem type, condition, unique features)
	Quality of protection (list of mapping of land tenure, land use, access points, roads, conservation covenants)
We are restoring natural areas.	Indicators specific to type of restoration activities. Common restoration activities (stream restoration, bioremediation, species re-introduction, evasive species removal) have standard indicators that are measured.
We are improving ecosystem integrity	Select indicators that represent key elements of an ecosystem. This could include indicators that relate to ecosystem drivers (like precipitation, snowpack, streamflow, water temperature, water quality, and unexpected weather conditions), natural disturbances, and biodiversity. A number of different frameworks have also been advanced to guide monitoring, for instance, Watershed Report Cards and Bio-inventory Mapping

[Connecting the Dots: Helpful Frameworks for Measuring Action and Impact \(Part 1: The Environment\) Blog](#)

Green Economy

<p>We are changing practices in consumption, production (and building), transportation and disposal.</p>	<p>Shares of competing options to provide a service. For example, mode shares per person kilometre travelled, share of households that use geothermal energy for space heating relative to electric baseboards, etc.</p>
<p>We are changing how materials, energy and water are used.</p>	<p>Quantity and type(s) of material, energy and/or water used in an activity or product. For example, GJ, KWh or physical units for energy (which can be transformed using conversion factors), litres or cubic metres for water, weight or volume dimensions for materials.</p>
<p>We are changing the levels and frequency of pollution, waste and environmental damage.</p>	<p>Greenhouse Gas emissions (t CO₂e)</p>
	<p>Criteria Air Contaminant emissions</p>
	<p>Organic matter in water, e.g. Biochemical Oxygen Demand (BOD)</p>
	<p>Detection of pathogens</p>
	<p>Pollutant concentration</p>

[Showing the Value of Green Building](#)

[Connecting the Dots: Helpful Frameworks for Measuring Action and Impact \(Part 1: The Environment\) Blog](#)

Reuse and Recycling

We increase community participation in recycling and waste reduction	# pickups (or drop offs)
	participation rate (% of households that use program/ households with access to program)
	characteristics of those who participate (and those who may not)
	Perception of the facility / service
We reduce the amount of waste in landfill	# tonnes waste diverted
	recycling rate (total tonnes of recyclables collected by total tonnes of recyclables and refuse from the same region.)

You may also be interested in the following DV tools, resources and blogs on the DV website:

[Tracking the Value of Recycling and Waste Reduction](#)

Financial Performance

We are able to pay our bills	current ratio (current assets / current liabilities)
We have diversified revenues	\$ revenue by source
	# customers accounting for x% of sales
	% revenue by source
	% total revenue by top 3 customers
We have extra funds to manage future shortfalls	accumulated annual surplus (operating reserve)
We have sufficient financial return on the capital we invest	return on Investment (for specific capital investment)
	return on assets (net profit / total assets)
We manage our debt	debt/asset Ratio
We are increasing the number and value of donors and partners	anecdotes/ quotes of “grant funding highlights”
	# donors/partners
	\$ donations
	\$ / donor
We cover all of our costs with the sales revenue that we receive	% net margin (net profit ÷ Sales x 100; net profit = sales - total expenses)
We cover the cost of sales from the sales revenue	% gross margin (gross profit ÷ sales x 100)
We maximize profits by product/service	change in profit margin by product/service (or graph which breaks out time periods)
We maximize revenues and control costs to increase profits	\$ revenue by product/service
	Break out of revenue/cost structure from Income Statement

We maximize revenues and control costs to increase profits	change in revenue by product/service (or graph which breaks out time periods)
We earn sufficient income from the business and can meet any shortfall from other sources	business cost recovery ratio (business costs/sales revenue). Business costs are net of social costs to directly support the mission
	% revenue from sales
We enable our parent organization to be more financial sustainable	list of the use(s) of surplus generated
	\$ value of revenues (and/or profit) generated for non-profit parent organization

You may also be interested in the following DV tools, resources and blogs on the DV website:

[Financial Intelligence for Social Enterprises](#)

[Financial Ratio Analysis](#)

[Understanding Financial Success: Three Key Questions for Social Enterprises \(blog\)](#)

Operations

We efficiently and consistently deliver our service	wastage (physical units of material or energy)
	% capacity utilization of equipment or other capital (actual/potential use)
	production costs per unit (all or key costs)
	average time (hours/minutes) to complete task
	% on time deliveries
We operate safely and minimize hazards	description of compliance with standards
	# safety incidences
We can meet order demand	order fill rate
Our operations are environmentally sustainable	# tonnes waste diverted (or cubic yards)
	# kWh (or GJ) energy saved
	# Litres of Food Waste Diverted
	# Tonnes CO2e Reduced
	# litres of water used/ time period
	% water used in particular process
	% recycled input materials used

You may also be interested in the following DV tools, resources and blogs on the DV website:

[Social and Environmental Operations Assessment](#)

[Tracking your Business Performance](#)

Sales and Marketing

We are developing enduring relationships with customers	% customers with a relationship >x years (customer loyalty)
	% willingness to reorder / return
	# returning customers
We meet customer needs	list of comments provided by customers in survey
	% customers that report they are 'satisfied' or 'very satisfied'
	# times services have been redone or refunded
	list of needs met by product/service
	% customers who recommend services
We are attracting more customers	# new customers
	# total customers
	# customers by referral source/region/product or service
	% market (# customers/# potential customers)
	map of geographic spread of business
We have customers that are aligned with our mission	% customers who indicate that they value our mission
We are attracting more customers	\$ revenues generated by new customers
We have effective marketing and sales	# sales/contracts finalized
	list of current/recent marketing initiatives
	# sales leads
	\$ value of sales leads (potential revenue)

	sales conversion rate
	\$ sales
	# sales leads by type of marketing campaign
	% advertising utilization rate
	# units purchased
We have increasing sales of products/services with greater profit margins	% sales growth by product/service

You may also be interested in the following DV tools, resources and blogs on the DV website:

[Tracking your Business Performance](#)

[Guide to CRM Systems](#)

[Customer Satisfaction Survey](#)

Human Capital

Our board and staff have strong connections with the local community	# Board Local Connectedness
We have considerable experience and expertise in this field	Listing of projects during last year (shown as a word cloud)
	# projects completed
	Examples of projects
	List of achievements/milestones
	List of Employees and current contractors
	# years experience
We attract volunteers	# volunteers
	# volunteer hours in a specific time period
We value of the time donated by our volunteers	\$ value of volunteer hours
We have a growing, engaged membership base for our co-op	# members participating in specific activities (or expressed as share of total)
	% Members satisfied with co-op
	Anecdotes/ quotes from members that highlight their experiences
	% members coming from referrals
	Profile of cooperative member demographics (gender, age, residence)
	# total members
	# new members

	# returning members
We attract and keep the right people	turnover rate
	time-to-fill
	recruitment source
	reasons for leaving
	absenteeism rate
	overall satisfaction
	skills needed/available
	diversity (# / % of specific demographic)
We are successful in supporting people to accomplish their goals	satisfaction with development opportunities
	completion of performance plans and reviews
	training and mentorship opportunities
	(existence of, take-up and satisfaction with)
People are compensated well	employee's view of the benefits and compensation
	\$ hourly wage compared to industry standard
	\$ value of benefits compared to industry standard
	use of benefits

Other Organizational Sustainability

We have the systems and processes to adapt to new challenges and opportunities	list of key strategic initiatives undertaken/completed
	budget devoted to capacity building
	success of technology initiatives*
	% process documentation completed
We have a solid assets and are financially sustainable	accumulated annual surplus (operating reserve)
	# customers accounting for x% of sales
	\$ or % revenue by source
	debt/asset ratio (if managing debt)
	current Ratio (current assets / current liabilities)
	revenues lost to inadequate assets
Key partners in the community appreciate and trust us	# complaints or withdrawals of support
	list of ways the community supports what you do
	feedback from partners
We enable our parent organization to be more financial sustainable (This applies to some social enterprises)	list of the use(s) of surplus generated
	\$ value of revenues (and/or profit) generated
	for non-profit parent organization
We show leadership, and have considerable experience and expertise	combined years of staff experience
	board profile
	list of awards/achievements/milestones
	years in operation

	change in scale/scope offered (products, markets...)
	# and type of media exposure
Key stakeholders appreciate and trust the program	# complaints or withdrawals of ____(stakeholder group)___
	% of ____(stakeholder group)___ that are satisfied with the program
	% of ____(stakeholder group)___ that recommend program
	% cumulative average satisfaction score of specific stakeholders
We meet the needs of ____(particular stakeholder group)___	Description of connection points
	Relevant corporate-wide performance indicators

You may also be interested in the following DV tools, resources and blogs on the DV website:

[Organizational Sustainability Assessment Tool](#)

[Social Enterprise Evaluation Question Set](#)

[Demonstrating Organizational Sustainability is More Important than You Think \(Blog\)](#)