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VALUES-BASED INDICATORS TOOLKIT

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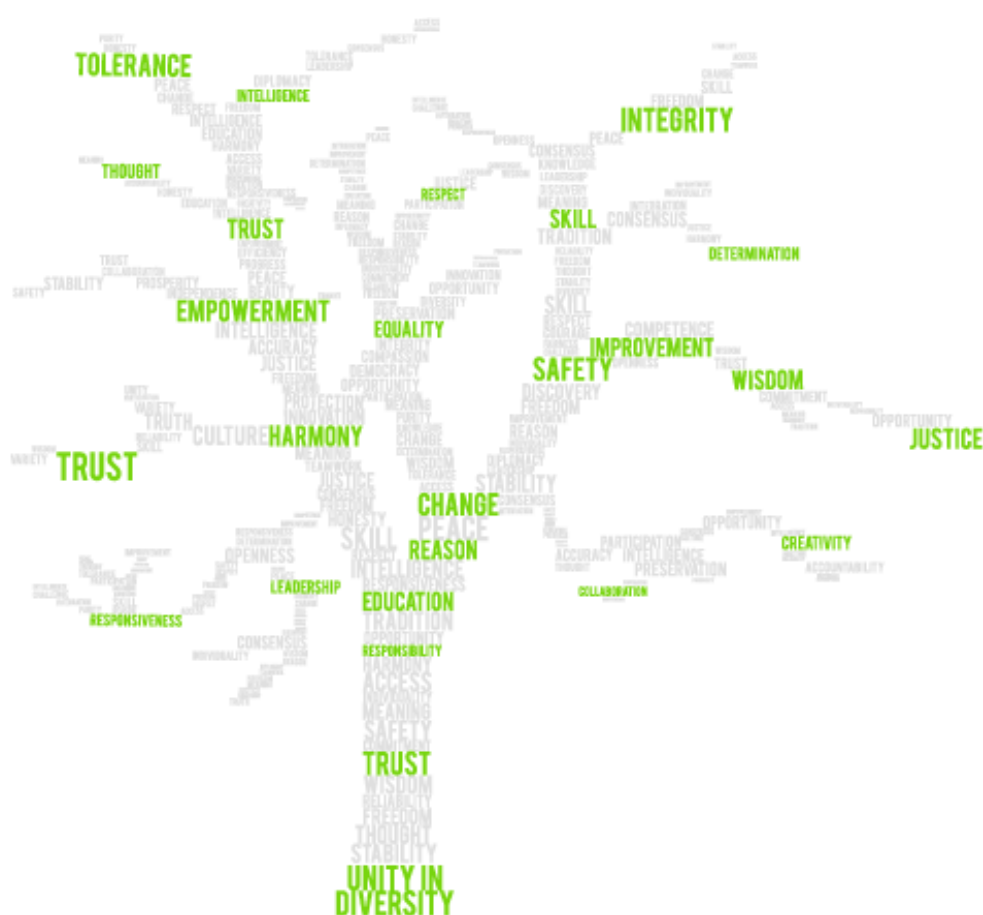
VALUES-BASED INDICATORS TOOLKIT

To be used in conjunction with `Values-Based Indicators: Guidance Notes for Civil Society Organisations'

Form A: Indicator Shortlist Form

Please read sections 2.1 to 2.3 of the guidance notes and then, as an individual or as a group, use this form to mark all the indicators that you think could be relevant to your organisation or project by putting an X or * in the box. Do this by thinking about which indicators relate to something that's important for the success of your organisation or project, not by thinking about the current situation (what is present and what's missing right now), or about how the indicators will be measured.

Do not change the wording of the indicators at this stage – there will be an opportunity to do that later. Note that 'entity' has been used in all the indicators as shorthand for 'project, team, organisation, group or company'.

You may need to print the form out and share it with others.

Code No.	Indicator	Mark if Relevant
1	Everyone has their place in the team	
2	Everyone knows what their responsibilities are within the team	
3	Everyone feels responsibility for their part of the work	
4	Everyone knows what the final goal of his/her work is, as well as the work of the whole entity	
5	People feel that they are encouraged to fulfil their responsibilities	
6	People feel that they are given autonomy and trust to fulfil their responsibilities	
7	People feel that they are supported to fulfil their responsibilities	
8	Work environment is supportive of people being able to fulfil their responsibilities in their families or personal relationships	
9	Work environment is supportive of people being able to act with care in their families or personal relationships	
10	People follow through on their commitments	
11	Partners are trusted to follow through on their commitments without the need for formal agreements	
12	People feel that they are trusted to follow through on their commitments	
13	Goals are reviewed between committed parties to determine what has and has not been achieved	
14	Decision-making processes are ethical	
15	Decision-making processes are democratic	
16	Decision-making processes provide for equal representation	
17	Decision-making takes into account the social, economic and environmental needs of future generations	
18	People participate actively in reaching the entity's goals	
19	People participate actively in making decisions about issues that affect their lives	
20	People participate actively in developing the entity's code of ethics	

21	People participate actively in developing procedures to deal with unethical conduct	
22	People feel that there is transparent communication	
23	Entity is transparent about the processes of decision-making	
24	Entity is transparent about the outcomes of decision-making	
25	People feel that there is the right information flow	
26	Entity shares information openly with people	
27	Regular monitoring of how people are treated	
28	Action is consciously taken to improve the ways that people are treated	
29	Teams include members with different characteristics (e.g. gender, culture, age and other aspects of individual difference such as personality)	
30	Different points of view are heard and incorporated	
31	People feel that different approaches are valued	
32	Trusted partners are given flexibility to do things differently within prescribed structure	
33	Learning processes accommodate different learning styles	
34	People feel that their own individual identity and approach is respected	
35	People feel that their worth is acknowledged	
36	Women feel that they are valued	
37	Women feel that they have equal access to information	
38	Women feel that they are given equal opportunities to participate in decision-making processes	
39	People have self-respect	
40	People are inclusive (talk to everyone and no one is left out)	
41	People respect the differences in others	
42	People appreciate the differences in others	
43	People find ways to understand the differences in others	
44	Entity acts in a manner that is impartial and non-discriminatory (not discriminating on the basis of nationality, ethnic origin, colour, gender, sexual orientation, creed or religion)	
45	People learn freely together, regardless of nationality, ethnic origin, skin colour, gender, sexual orientation, creed or religion	
46	People share information freely, regardless of nationality, ethnic origin, skin colour, gender, sexual orientation, creed or religion	
47	People share their skills and abilities freely with one another, regardless of nationality, ethnic origin, skin colour, gender, sexual orientation, creed or religion	
48	Differences of opinion are acknowledged and valued through dialogue	

49	Conflicts are resolved through dialogue	
50	Open dialogue exists between project partners	
51	People are able to suspend their own standpoints during dialogue and listen to those of others	
52	Conflict resolution leads to learning and growth	
53	Individuals express their own opinions	
54	People feel that they have an equal opportunity to express their opinions	
55	Action is consciously taken to give everyone an equal opportunity to express their opinions	
56	People feel encouraged to express their opinions	
57	Action is consciously taken to encourage people to express their opinions	
58	People feel that their opinions are respected	
59	People feel that everyone's opinions are respected	
60	People become aware of how their existing knowledge, skills, resources and/or traditions can contribute to a project or the whole entity	
61	People feel that they are encouraged to contribute their existing knowledge, skills, networks, resources and/or traditions to a project or the whole entity	
62	Action is consciously taken to encourage people to contribute their existing knowledge, skills, networks, resources and/or traditions to a project or the whole entity	
63	People feel that their own knowledge, skills, networks, resources and/or traditions have already contributed to the outcomes of the project or entity	
64	People feel that their contributions to the entity are acknowledged	
65	Entity respects and acknowledges the contributions of others to its work, and gives credit for the outcomes to those who contributed	
66	People feel that they are encouraged to explore their own ideas and/or reflect on their own individuality	
67	People are taking the opportunity to explore their own ideas and/or reflect on their own individuality	
68	People feel that they have been given the opportunity to explore the wisdoms, traditions and values that they already hold, rather than having something imposed upon them	
69	People feel that they are encouraged to develop their own visions and goals for projects, and/or for the whole entity	
70	People are taking the opportunity to develop their own visions and goals for projects, and/or for the whole entity	
71	People feel that they are encouraged to develop programs, identify problems and deliver solutions on their own	
72	People are taking the opportunity to develop programs, identify problems and deliver solutions on their own	

73	People investigate what is right and good by themselves, rather than adopting other people's opinions	
74	Entity's activities or events have a motivating effect on participants	
75	Entity's activities or events connect participants emotionally to the community of life	
76	People feel that they are encouraged to reach their potential	
77	People feel that their personal needs for development in the work place are met	
78	People feel that they are provided with opportunities for personal growth	
79	Entity has a culture of learning	
80	People have an attitude of learning towards their development	
81	People reflect critically on what is necessary to learn	
82	People are not afraid to make mistakes	
83	Mistakes are understood as opportunities to learn and improve	
84	People feel that the work environment is pleasant and harmonious	
85	People are perceived to be respectful in their interactions with others	
86	People treat each other with kindness	
87	People speak courteously to each other	
88	People introduce ideas to others with respect, humility and patience	
89	People are perceived to be trustworthy	
90	People are perceived to be truthful	
91	People are perceived to be honest	
92	People are perceived to be transparent	
93	People are perceived to practice integrity in their interactions with others	
94	People do not back-bite about others within the entity	
95	People feel that they create something better or greater as a group than on their own	
96	People feel that they can participate in the vision and activities of the entity or project without compromising their personal beliefs or values	
97	Group norms exist	
98	People follow the group norms	
99	People's behaviour is consistent with their words	
100	People strive to become conscious of their value system	
101	People can identify applicable ethical values in a given context	
102	People strive to put their personal values into practice	

103	Actions of individuals are consistent and in harmony with the core principles promoted by the entity	
104	People strive to bring their lives into accordance with the entity's values	
105	Leaders act as living representatives of the principles they espouse	
106	People feel inspired by the way that leaders live their principles	
107	As a result of the entity's messages or activities, people start their own personal initiatives with similar goals	
108	As a result of the entity's messages or activities, people's personal lifestyles include more conscious pro-environmental behaviours	
109	As a result of the entity's messages or activities, people establish new organisations or groups	
110	People have demonstrated the ability to replicate a project or approach in other communities or organisations	
111	People invest their own time and resources in activities that benefit the environment or society	
112	Entity aims to provide people with educational opportunities that empower them to contribute actively to sustainable development	
113	People have a sense of power that they can effect change	
114	Entity allows local groups who have an interest in their work to contribute their ideas or become partners on a project	
115	Partners trust that each shares a commitment and willingness to collaborate for a similar vision	
116	Entities are willing to work with each other because they respect each other	
117	People are productive	
118	People are creative	
119	Decisions made in the entity are supported	
120	People feel that they are treated equitably and with fairness	
121	Recruitment processes are conducted in a way that is perceived as fair to all applicants	
122	Remuneration/payment policies are perceived as fair by all involved	
123	Human resource management policies are perceived as fair by all involved	
124	People treat each other with equity and fairness	
125	Truth-seeking, non-judgmental, confidential channels are in place for individuals/teams seeking guidance on the application of ethics, reporting violations and examining violations of ethics	
126	People trust the channels that are in place for individuals/teams seeking guidance on the application of ethics, reporting violations and examining violations of ethics	

127	Performance goals are measured	
128	Performance goals are communicated internally or externally	
129	Financial integrity is assessed	
130	Financial integrity is communicated internally or externally	
131	Resource use efficiency is measured	
132	Resource use efficiency is communicated internally or externally	
133	People have respect for nature	
134	Action is consciously taken to contribute to a greater respect for nature	
135	People understand the complexity of natural systems	
136	Action is consciously taken to contribute to a greater understanding of the way nature is organised in systems and cycles	
137	Action is consciously taken to contribute to a greater understanding of the natural world as a source of personal fulfilment	
138	The environment and community of life is celebrated	
139	Entity is aware of the interconnectedness between the environment and their sphere of activity	
140	People are aware of the connectedness between their religion and the environment	
141	Entity acts to reduce its environmental impact or remedy its contribution to environmental problems	
142	Entity is aware of its environmental impact or its contribution to environmental problems	
143	Entity has successfully reduced its environmental impact or remedied its contribution to environmental problems	
144	Entity strives to have a positive effect on the natural environment.	
145	Entity recognises its role as a protector of the natural environment	
146	Entity acts to protect the environment, without waiting for governments or others to act first	
147	Entity is open to dialogue about alternative means of production that have less negative impact, no impact, or a positive impact on the environment	
148	Entity implements a policy of purchasing environmentally sustainable products, e.g. recycled paper, even if cheaper alternatives exist	
149	Entity implements a policy of procuring some or all of its energy from renewable sources	
150	Entity implements a policy of reducing carbon emissions	
151	Entity implements a policy of sustainable waste management, e.g. recycling or reducing waste	
152	Number of activities/projects towards goal of environmental sustainability	
153	Number of activities/projects for raising awareness of environmental sustainability	

154	Quality of process of activities or projects aiming to achieve or promote environmental sustainability	
155	Action is consciously taken to share with others how to protect and restore the natural environment	
156	Education is undertaken to raise awareness and capabilities for the organisation to act according to principles of environmental sustainability	
157	Entity actively seeks to work with others who will increase their ability to improve the environment	
158	Long term commitments to protect the environment are created	
159	Long term commitments to protect the environment are adhered to	
160	Entity contributes positively to society by working to address social problems or global issues	
161	Entity implements a policy of ethical investment	
162	Number of activities/projects towards goal of addressing the social aspects of sustainability	
163	Number of activities/projects for raising awareness of the social aspects of sustainability	
164	Quality of process of activities or projects aiming to achieve or promote social aspects of sustainability	
165	Entity's activities or events create a safe environment for people	
166	Work is viewed as a form of service	

Form B: Personalising Indicators and Targeting for Measurement

Please read sections 2.4 of the guidance notes, then copy and paste <u>all</u> the indicators that you marked as 'relevant' in Form A into the empty boxes. You can insert more rows if you marked more than 20 indicators. Now, as an individual or as a group, you can personalise the indicators if you want to, by changing the wording.

After reading sections 2.5 and 3 of the guidance notes, please mark with an X or * all the indicators that you'd like to try measuring.

You might also find it helpful to refer to Appendix A of the guidance notes, and to the case studies available at www.wevalue.org/peopleandprojects/casestudies.php, to see how your chosen indicators have been measured in other settings.

You may need to print the form out and share it with others.

Code No.	Indicator	Select for Measurement

Form C: Indicator Measurement Overview

After reading sections 4 and 5 of the guidance notes, copy and paste all the Indicators that you selected for measurement (from Form B) into the empty boxes. Use all the space that you need. You can insert more rows if you decided to measure more than 5 Indicators, and you might even decide to put each Indicator on a separate page – especially if you measured each of them in several different ways, as we recommend.

As you make decisions about Measurement Methods, design your Assessment Tools, collect your data and think about what it means, use this table to keep track of your results and conclusions. You may need to print the form out and share it with others.

Code	Indicator Description	Measurement method(s)	Specific questions asked, behaviours observed, etc.	Results	Conclusions (what did you learn from the results? What can you say about the Target Indicator?)

Form D1: Using your results to evaluate pre-defined Values

NB: Complete this form ONLY **if your entity (organisation, project, etc.) already had well-defined Values before doing this evaluation,** e.g. specific values that are listed in its mission statement or on its website, **or if you have recently reached a consensus about your entity's Values in preparation for this evaluation.** If you haven't discussed Values in your entity before, or if there isn't a strong consensus about the Values of your entity, use Form D2 instead.

After reading Section 5.1A of the guidance notes, type your entity's Values into the text box below:

OUR VALUES:

Now copy and paste the Indicators from Form C into the table below. Use all the space that you need. You can insert more rows if you measured more than 5 Indicators. Having measured the Indicators, can you link them to any of the Values in the list above? (There may be more than one for each Indicator). Are there any other Values that come to mind when you look at the Indicators, which weren't included in your entity's original mission statement? Type them in the table below.

Code	Indicator Description	Values in our list that this Indicator relates to	Other Values that this Indicator relates to

Form D2: Using your results to clarify what your entity's Values are

NB: Complete this form ONLY **if you haven't discussed Values in your entity (organisation, project, etc.) before, or if there isn't a strong consensus** about the Values of your entity. If your entity already had well-defined Values before doing this evaluation, e.g. specific values that are listed in its mission statement or on its website, or if you have recently reached a consensus about your entity's Values in preparation for this evaluation, use Form D1 instead.

After reading Section 5.1B of the guidance notes, reflect individually or as a group on the Indicators that you measured and type any common themes and/or Values that you have identified, through your discussions, into the text box below:

Now copy and paste the Indicators from Form C into the table below. Use all the space that you need. You can insert more rows if you measured more than 5 indicators. Which of the themes or Values in the list above does each Indicator relate to? (There may be more than one for each Indicator). Are there any other Values that come to mind when you look at the Indicators?   Type them in the table below.

Code	Indicator Description	Values in our list that this Indicator relates to	Other Values that this Indicator relates to

Form E: Drawing some conclusions about Values

After reading Section 5.2 of the guidance notes, copy and paste the Values and Indicators from Form D1 or D2, respectively, and the conclusions from Form C, into this table. Use all the space that you need. You can insert more rows if you have more Values, or more Indicators for a given value, than this table allows for.

Value	Relevant Indicators		Conclusions (what our results told us about these Indicators)
	Code	Indicator	

Does this tell you anything useful about Values, and things related to Values, in your entity – good or bad? Enter some text in the box below:

Form F: Feedback Form

The We Value team would love to see your findings, and learn about whether the Values-Based Indicators have been useful for your entity. Please e-mail a copy of your completed Toolkit, or as many of the forms as you feel comfortable sharing, to sdecu@brighton.ac.uk.

Even if you'd prefer not to share your actual findings, we would appreciate receiving Forms A-B and the completed Feedback Form (below).

If you've printed out your forms and filled them in by hand, and would prefer to send a photocopy, you can mail the forms to: Sustainable Development Coordination Unit, Cockcroft Building, Lewes Road, Moulsecoomb, Brighton BN2 4GH, UK.

1. In general, how much did you (as an individual) participate in choosing the indicators and learning from the results? (Delete as applicable)
   Very much / Quite a lot / Only a little / Not at all

2. Who else participated (individuals and/or groups)? Please list as many as you can remember.

3. Can you say anything about *how* they participated, or at what level?

4. Do you feel that the goal of measuring something useful about Values was achieved? (Delete as applicable)
   Yes, totally / Yes, partially / No, not too much / No, not at all / Don't know

5. How likely is it that you will measure any of the indicators again in the future? (Delete as applicable)
   Very likely / Quite likely / Not very likely / Very unlikely

6. In what ways did you expect the We Value process to be useful for your organisation, before you tried it? In what ways was it actually useful, if at all? Please mark all the answers that apply.

	I expected We Value to be useful for this	Our entity actually found it useful for this
Clarifying our organisation's values		
Increasing people's commitment to values		
Helping us to understand the overall strengths and weaknesses of the entity (organisation, group, company)		
Helping leaders to understand people's individual strengths and weaknesses		
Raising people's awareness of their individual strengths and weaknesses		
Giving us ideas about how to improve our activities, products or services		
Giving us ideas for new activities, products or services		
Strengthening relationships within team(s) or in the entity as a whole		
Improving communication within team(s) or in the entity as a whole		
Improving decision-making processes		
Solving problems or addressing challenges		
Helping us to prioritise activities		
Helping us to understand the impacts of our work		
Helping us to report back to existing donors on the impacts of our work		

Changing the way in which monitoring and evaluation activities are carried out within the entity		
Helping us to write funding proposals		
Helping us to communicate our message to the public		
Helping us to attract or recruit new people (members, customers, etc)		
Reflecting on how values are translated into action (or not!)		
Strengthening relationships between the entity and its beneficiaries, customers, target audience, etc.		
Other:		

7. Did you or your entity see any benefits of using We Value? Why should any other group bother to use it? Please comment briefly.

8. Do you have any other comments about the We Value Toolkit and Guidance Notes, e.g. design, ease of use, content, or what you'd like to see included in the future?