

M&E framework development



What we offer

Dialogue can work with you and your implementing partners to develop monitoring and evaluation (M&E) frameworks for your CSI projects. We apply the principles of the Kellogg Foundation's programme logic model in our work.

The process includes facilitated workshops with you and your project partners to agree on the objectives, activities, outputs, outcomes and intended impact of the project. The indicators for each of these are agreed, together with data collection methods, frequencies and responsibilities.

You will be provided with a high-level M&E framework for the project, together with tools to gather information (e.g. questionnaires, site visit checklists, Excel databases) and reporting templates.

Why do it?

M&E is a shared responsibility for you and your implementing partner to ensure that funds are being used to good effect. It allows you to determine what impact your CSI projects are having on society and on the company, and to share this with external stakeholders. Additionally, it provides information that helps to adjust and improve projects while they are underway. The process of developing the M&E framework helps to ensure that all project partners have the same objectives and are in agreement on how to measure success.

Why Dialogue?

Dialogue has over 15 years of experience in the CSI sector in South Africa and we have worked with many leading South African companies on their M&E frameworks. We have conducted reviews of hundreds of CSI projects over this time. We also interview over 100 corporates on their CSI practices each year and have built up a comprehensive database of CSI practices in South Africa.

Programme benchmarking

What we offer

Dialogue can benchmark your CSI programme against a number of competitors or peers of your choice. We will compare the CSI programmes across a number of areas, including expenditure, structure and number of staff, developmental and geographic focus areas, projects, volunteerism, monitoring and evaluation, marketing, and awards and ratings.

The benchmarking is based on public information and supplemented with information from our database of CSI practices built up over many years of research and experience.

You will be provided with a report containing a summary of findings highlighting relative strengths, opportunities and recommendations, followed by detailed information on the CSI programmes.

Why do it?

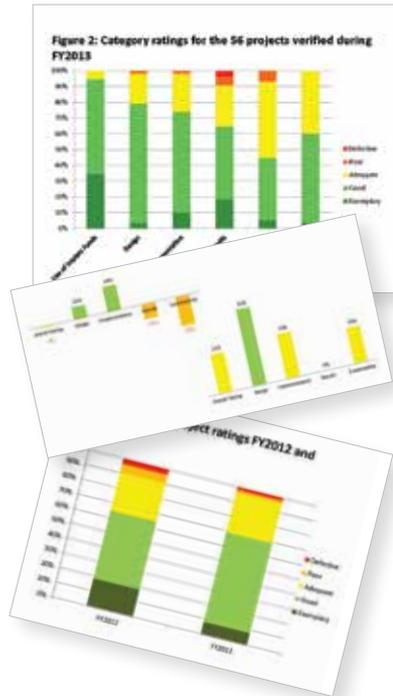
Benchmarking your CSI programme will allow you to compare and position it relative to your peers. You will be able to identify the relative strengths of your programme as well as areas that require attention. You will also be able to identify potential areas for differentiation or collaboration.

Why Dialogue?

Dialogue has been conducting extensive research into the CSI practices of companies in South Africa for over 15 years. Each year we interview over 100 corporates on their CSI practices and publish the aggregated results in the annual Dialogue CSI Handbook. Over time we have built up a comprehensive database of CSI practices in South Africa, which is supplemented by our extensive experience in consulting with many leading South African companies. This information and knowledge is unique to Dialogue and is a key input into the benchmarking process.

Company	2010		2011		2012		2013		2010-2013 growth
	Spended (Rm)	% of sales							
Company 1	11	-	30	-	30	-	177	-	-
Company 2	70	1.0%	100	1.6%	77	1.1%	125	1.8%	80%
Company 3	73	1.7%	80	1.8%	89	1.4%	108	1.4%	48%
Company 4	100	0.7%	91	1.4%	96	1.3%	92	1.0%	10%
Company 5	72	-	72	0.3%	-	-	-	-	5%
Company 6	28	-	-	-	-	-	-	-	7%
Company 7	-	-	-	-	-	-	-	-	18%

Project reviews



What we offer

Dialogue has developed a process for reviewing the performance of your CSI projects. Our methodology involves scoring project performance across a number of pre-determined elements, enabling a comparative performance rating for different projects.

The process includes a review of existing project information, stakeholder interviews, site visits and beneficiary surveys. The information from these activities is analysed using our project review methodology.

You will be provided with an overall score of project performance as well as a score against each of the elements of review. A detailed report on the achievement of objectives and performance in each of the areas will follow, together with the quantification of outcomes and impact where supporting evidence exists.

Why do it?

A review of project performance will determine whether CSI funding is achieving positive outcomes. It identifies areas of sub-optimal or dysfunctional performance so that remedial action can be taken. It also identifies areas of success, which can be shared or expanded upon. If done for multiple projects, the review allows a comparison of performance across projects. CSI project reviews are useful to funders and implementing partners, who share an interest in sustaining the project and improving outcomes.

Why Dialogue?

Dialogue has been conducting extensive research into the CSI practices of companies in South Africa for over 15 years. Over the past few years we have reviewed over 200 CSI projects, at varying levels of depth and complexity. We have used the knowledge and experience gained to develop our pragmatic project review methodology.

Triologue's CSI strategy framework



What we offer

Triologue specialises in the development of company-specific corporate social investment (CSI) strategies. We use a proprietary framework based on years of experience to guide the process. It covers objectives, focus areas, alignment, structures, resources, communication and monitoring and evaluation.

Typically we conduct background research and a number of stakeholder interviews before facilitating a strategy workshop that focuses on best practice and the way forward in each of the areas. It is useful to benchmark the CSI programme and position the projects on Triologue's strategic positioning matrix prior to the strategy development process.

Once a strategy has been developed and approved, we can assist in the implementation of the strategy in a number of ways, including the identification or development of flagship projects, the compilation of budgets and exit plans, and the development of tools including application forms, and monitoring and evaluation frameworks and forms.

Why do it?

A CSI strategy provides guidance for all of your CSI activities. It identifies the objectives of the programme, how to achieve them and how to measure whether they are achieved. When implemented effectively, it results in more focused, effective CSI performance that is aligned to your business objectives.

We recommend revisiting the CSI strategy every three years.

Why Triologue?

Triologue has over 15 years of experience in the CSI sector in South Africa and we have worked with many leading South African companies on their CSI strategies. In addition, we interview over 100 corporates on their CSI practices each year and have built up a comprehensive database of CSI practices in South Africa.

Reporting

What we offer

Triologue offers a full CSI reporting service, from information gathering and writing to design, print and delivery. We apply our knowledge of CSI to ensure that the right information is included in clear, compelling editorial.

Our CSI reporting work varies from project case studies for different audiences and platforms (brochures, websites, annual reports, posters) to published foundation reports. The range of services we offer includes concept design, information collection, writing, editing, proofing, design, photography, print management and delivery.

Why do it?

Studies show that there is significant value in a company's good reputation, and CSI can make an important contribution to this. Communicating your CSI strategy, activities and the impact of these on society promotes your commitment to South Africa's development challenges and keeps important stakeholders informed.

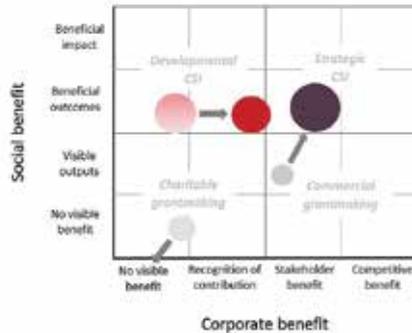


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Why Triologue?

Triologue has over 15 years of experience in the CSI sector in South Africa and we have supported many leading South African companies with their CSI reporting. We are able to apply our deep understanding of CSI to ask the right questions and structure the information logically. Our extensive experience in integrated and sustainability reporting allows us to match the tone and depth of content with the target audience.

Triologue's CSI positioning matrix



What we offer

Leading CSI practice advocates shared value, whereby positive developmental outcomes are accompanied by a business return from CSI expenditure. Triologue has developed a diagnostic tool that scores CSI projects on both a development and business scale and locates them on a strategic positioning matrix.

Each quadrant of the matrix has defining characteristics and accompanying criteria, which are used to score CSI projects. You will be provided with a visual display of where your CSI projects are located on the strategic positioning matrix, together with a description of how they performed against the key criteria. Your expenditure on each project will be incorporated in the display to show at a glance what proportion of funds fall into each quadrant.

Why do it?

The analysis and location of CSI projects on the matrix provides invaluable insights on the performance of a portfolio of CSI projects. It can be used to inform strategic decisions, such as how to change the positioning of projects and whether to expand or exit projects. It also provides information that can be used to identify project elements that conform to, or fall short of, lead practice. Additionally, the analysis can be used to report CSI performance to internal or external stakeholders and to track changes in strategic project positioning over time.

Why Triologue?

Triologue has over 15 years of experience in the CSI sector in South Africa and we have supported many leading South African companies with their CSI strategies and project reviews. We also interview over 100 corporates on their CSI practices each year and have built up a comprehensive database of CSI practices in South Africa. We have embedded our unique knowledge of this field in the design of the CSI strategic positioning matrix.

Dialogue consulting services

Sustainability consulting

<ul style="list-style-type: none"> • Gap analysis • ESG positioning matrix 	<ul style="list-style-type: none"> • Sustainability strategy and roadmap development 	<ul style="list-style-type: none"> • Sustainability management framework development • Stakeholder mapping and engagement 	<ul style="list-style-type: none"> • Integrated reporting • Sustainability reporting 	<ul style="list-style-type: none"> • Report review
				
DIAGNOSE	PLAN	IMPLEMENT	REPORT	REVIEW
				
<ul style="list-style-type: none"> • CSI programme benchmarking • CSI positioning matrix 	<ul style="list-style-type: none"> • CSI policy and strategy development 	<ul style="list-style-type: none"> • CSI strategy implementation support • M&E framework development 	<ul style="list-style-type: none"> • CSI reporting 	<ul style="list-style-type: none"> • CSI project performance review

CSI consulting

Our knowledge-sharing activities

- Publish the annual **CSI Handbook**, the industry standard for insights, researched trends and best practice in the CSI arena
- Undertake research and publish thought-leadership in the annual **Trialogue Sustainability Review** (FM supplement)
- Host the annual **CSI Matters conference** and quarterly **CSI Matters forum**
- Co-host regular **Trialogue Sustainability forums**
- Deliver regular **CSI training**

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