



UP2YOU

Bottom-up sustainable
and inclusive development

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GUIDELINES ON HOW TO SET UP AND RUN COMMUNITY BALANCE SCORECARD



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TABLE OF CONTENTS

Introduction

Structure of the CBS

How to Use the CBS – A Step-by-Step Guide

CBS and LCL Synergy

How to Interpret CBS Results

Updating and Improving the CBS

Examples and Good Practices

Conclusions&Annexes

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1. Introduction: What is the CBS?

The Community Balance Scorecard (CBS) is a participatory evaluation tool designed to help local actors—such as universities, civil society organisations (CSOs), youth networks, and municipalities—monitor and guide community development efforts. Developed within the UP2YOU project through a co-creation process involving multiple European partners, the CBS provides a simple yet robust structure for evaluating initiatives aligned with the Sustainable Development Goals (SDGs).

Unlike top-down evaluation systems, the CBS emphasizes bottom-up, community-driven measurement by tracking progress across four balanced dimensions: social, economic, educational, and environmental. It is flexible enough to adapt to various types of pilot actions, learning activities, and territorial engagement strategies.

2. Structure of the CBS

The CBS is built around a Community Index, which is calculated using indicators grouped into four interdependent dimensions:

Dimension	Focus Areas
Social	Inclusion, participation, well-being, community belonging
Economic	Employment, entrepreneurship, job-readiness, income equity
Educational	Access to learning, flexible training, upskilling, relevance of education offers
Environmental	Sustainability practices, awareness, community actions, green entrepreneurship

Each dimension contains a set of indicators—qualitative or quantitative—which are selected or adapted by local actors based on the context of their pilot action.

The CBS supports:

- Shared reflection during and after project implementation
- Participatory monitoring with stakeholders
- Storytelling of change, backed by real data

3. Step-by-Step: How to Use the CBS in Your Community

This section outlines a practical pathway for applying the CBS in LCL activities.

Step 1: Form Your Local Group

- Involve key stakeholders: university departments, CSOs, youth groups, local institutions
- Ensure diverse representation (age, background, roles)
- Use a stakeholder engagement strategy and invitation letter template

Step 2: Co-Define Your Local Objectives

- Host initial workshops to identify the main challenge or transformation goal
- Use problem and solution trees (e.g. Canva-based templates)
- Select a shared objective, such as youth employment, digital literacy, or environmental sustainability

Step 3: Select Relevant CBS Dimensions and Indicators

- Choose 2 to 4 CBS dimensions that best match your pilot activity
- Select indicators from the CBS database or co-create new ones

- Example indicators:
 - % of youth with improved digital skills
 - Number of community actors involved
 - Perceived change in confidence or well-being (via self-assessment surveys)
 - Reduction in environmental waste or CO₂

■ Step 4: Apply CBS Tools Throughout the Pilot

- Integrate CBS into training design (pre/post tests, surveys, peer reflections)
- Use tools such as:
 - Google Forms or printed surveys
 - Miro or Padlet for brainstorming
 - Focus groups and participatory mapping
 - Mentor feedback forms

■ Step 5: Analyze and Visualize the Data

- Use the CBS platform or downloadable Excel templates
- Calculate the Community Index for your pilot
- Visualize change with bar charts, radar plots, or traffic light systems
- Highlight strengths, weaknesses, and lessons learned

4. How to Interpret Results

CBS is not just about numbers—it supports strategic learning. Here's how:

Pattern Observed	Interpretation
All scores improved except "social dimension"	Need more inclusive outreach or engagement mechanisms
Strong economic gains, low environmental results	Opportunity to add green elements to entrepreneurship
Mixed feedback on participation	Review format, session length, or accessibility
Improvement in knowledge, low behavior change	Add follow-up coaching or mentorship components

Results should be discussed in post-action meetings with all stakeholders.

5. Updating and Improving the CBS

To keep the CBS relevant and responsive:

- Update indicators annually based on local context and feedback
- Allow youth and community members to propose new metrics
- Add dimensions (e.g. Digital Inclusion) if required
- Reflect on findings from other territories and share CBS adaptations across Labs

 **TIP:** Use a shared Google Sheet to collect lessons from each LCL's CBS usage.

6. Examples of CBS in Practice

📌 Turkey – CEKDEV: “YOUTHLINK – Antalya Youth Skills Studio”

Objective: Combat youth unemployment by building digital, civic, and entrepreneurial skills.

CBS Use:

- Selected dimensions: Economic, Educational, Social
- Indicators:
 - % of participants with improved confidence (pre/post test)
 - of new community-led projects proposed
 - Degree of perceived social inclusion

Outcomes:

- 82% increased confidence
- 2 youth-led initiatives created
- Social belonging rose significantly based on qualitative feedback

📌 Italy – FCAT: “Tradizione InPressa”

Objective: Promote intergenerational dialogue and inclusion via craft workshops.

CBS Use:

- Dimensions: Social, Educational, Environmental
- Adapted CBS tools for low-literacy groups (oral surveys)

Outcomes:

- Participants reported high emotional engagement
- Developed new digital ceramic skills
- Strengthened cooperation between CSOs and municipality

7. CBS and LCL Synergy: Why It Works

The Community Balance Scorecard (CBS) aligns naturally and meaningfully with the Living Collaborative Labs (LCL) methodology developed under the UP2YOU project. Both tools are grounded in the principles of co-design, community engagement, and bottom-up innovation, which makes their integration not only strategic but also transformative.

Designed with and for Communities

The CBS is not imposed externally; it is built through dialogue with local actors, reflecting their unique priorities, values, and goals. Just like the LCL methodology, the CBS recognizes that communities are the experts of their own realities. The process of selecting indicators, measuring outcomes, and interpreting data is done collaboratively—ensuring that evaluation is not a technical task, but a shared act of reflection and planning.

Reflects the LCL's Theory of Transformation

The LCL model is based on the idea that lasting social change emerges when stakeholders co-create solutions. Similarly, the CBS empowers these same actors to track and shape that change over time. It does not focus only on outputs (e.g., number of trainings), but rather on outcomes such as improved self-confidence, increased social inclusion, or strengthened civic agency—all core to the LCL transformation logic.

Flexible Across Contexts and Communities

Whether used in rural Turkey, urban Spain, or island communities in Cyprus, the CBS provides a modular and culturally adaptable framework. Its indicators can be adjusted to reflect local dialects, capacities, and values. For example, a community concerned with environmental stewardship can prioritize ecological indicators, while another focused on education can emphasize learning access and relevance.

This mirrors the territorial flexibility of the LCL model, which encourages local actors to define their own pathways to inclusion, resilience, and opportunity.

✚ Supports Both Micro-Courses and Pilot Actions

The CBS can be applied to a wide range of activities emerging from LCLs:

- Micro-courses (e.g., a 2-day workshop on digital storytelling)
- Longer pilot actions (e.g., a 3-month social entrepreneurship incubator)

For both, CBS provides structured guidance on:

- Defining success
- Monitoring inclusion and engagement
- Tracking individual and collective learning
- Documenting systemic collaboration outcomes

This ensures that even small-scale initiatives are measured holistically and ethically, valuing both numbers and narratives.

🔍 Complements, Not Replaces, Evaluation

The CBS is not intended to replace formal project evaluation frameworks. Instead, it functions as a community-centered complement—bringing in dimensions that are often ignored in top-down assessment tools, such as:

- Perceived inclusion
- Informal skill development
- Trust in institutions
- Grassroots innovation

By doing so, the CBS amplifies the voices of participants and ensures that the lessons learned during the LCLs are both visible and actionable.

8. Conclusion

The CBS is not only a measurement tool—it's a community empowerment mechanism. It enables local actors to:

- Reflect critically on their work
- Generate shared evidence of progress
- Build stronger strategies for inclusion and sustainability
- Transfer learning across borders and institutions

It is an open and evolving framework, and each new application helps it grow.

“With CBS, you measure what matters most — and you do it together.”



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