

**SOCIAL OUTCOME MEASUREMENT
DOESN'T HAVE TO BE DIFFICULT**

—

5 STEPS TO GET YOU STARTED

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Step One: Why?

Step One:

Establish your purpose,
scope of measurement and
plan it


WHY?



STEP ONE

Why are you doing it?

- Triple Bottom Line – or the 3Ps: finances alone don't tell the whole story
 - Profit
 - Planet
 - People
- Who do you need to impress?
 - Financial measures don't tell the whole story
 - You're not in it purely for the financial gain
- Funders' & other stakeholders' interests may be different
 - May be financial
 - May be more output focussed
- Balance your need to demonstrate your added value with stakeholders' sets of interests




STEP 1: ESTABLISH YOUR PURPOSE

Scope the Work

- Don't under-estimate it: Social outcome measurement may be a big task
 - Might want to start easy – or tricky...
 - Prioritise
- Resources:
 - Your staff time
 - Takes their eye off the ball
 - Costs / benefits
- Consider phasing the work
 - Learn from experience
 - Develop in-house skills to transfer from team to team
 - May want to phase activity building up to the Annual Report or funding rounds

STEP 1: SCOPE THE WORK



Plan the Work


Make it part of your business strategy

- Can be a powerful tool for managing change
- Can impact on your marketing strategy
- Social Value Act

- Cost it
 - Staff time
 - Training requirements
 - External support costs

- Don't be put off by 'consultants': It's probably not as difficult as you may think!
- Develop your own in-house skills
- Be ambitious – you know you're good at what you do!

STEP 1: PLAN THE WORK




Step Two: Who?

Step Two:

Identify and involve key stakeholders

WHO?


STEP TWO



Stakeholder Analysis

- Stakeholder Analysis is used to identify the key people who are involved or interact with your organisation
- Use the opinions of the most powerful stakeholders to shape your projects at an early stage, improving the overall quality of your project or evaluation
- Identifying key stakeholders ensures the project or evaluation is more likely to be successful
- Helps you to anticipate what people's reaction to your project may be, and build into your plan the actions that will win people's support and feedback


STEP TWO - WHO ARE IMPORTANT TO OUR ORGANISATION?



Stakeholder Analysis: Identify Your Stakeholders

- Stakeholders may be both organisations and people; ultimately you must communicate with people
- Make sure that you identify the correct individual stakeholders within a stakeholder organisation
- Who are your stakeholders?
 - Who is affected by your work?
 - Who has influence or power of your work?
 - Who has an interest in your work being successful?


STEP TWO - IDENTIFYING STAKEHOLDERS



Stakeholder Analysis: Prioritise Your Stakeholders

- **High power, high interest:** these are the people you must fully engage and make the greatest efforts to satisfy
- **High power, low interest:** put enough work in with these people to keep them satisfied, but not so much that they become bored with your message
- **Low power, high interest:** keep these people adequately informed, and talk to them to ensure that no major issues are arising. These people can often be very helpful with the detail of your project
- **Low power, low interest:** again, monitor these people, but do not bore them with excessive communication

STEP TWO - PRIORITISING STAKEHOLDERS - POWER / INTEREST GRID



Stakeholder Analysis: Prioritise Your Stakeholders

STEP TWO - PRIORITISING STAKEHOLDERS – POWER / INTEREST GRID

Stakeholder Analysis: Understand Your Key Stakeholders

- Who influences your key stakeholders opinions, and who influences their opinion of you / your organisation?
 - Do some of these influencers therefore become important stakeholders in their own right?
- Who else might be influenced by your key stakeholders opinions?
 - Do these people become stakeholders in their own right?
- How do your key stakeholders want to receive information from you / give their feedback to you?
 - What is the best way of communicating your message to them, and them communicating your message to you?
- What is their current opinion / how do they value your work?

STEP TWO - UNDERSTANDING KEY STAKEHOLDERS

Step Three: What?

Identify the outcomes you propose to achieve and the indicators that show you are meeting those outcomes

WHAT?

STEP THREE

Outputs Vs. Outcomes, Hard Vs. Soft

OUTPUTS
are the services and facilities you deliver
include training courses, support sessions and publications

OUTCOMES
all the changes and effects that happen as a result of your work

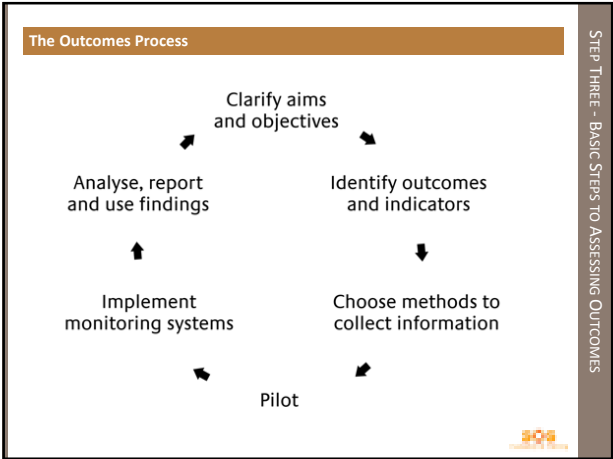
HARD ↓

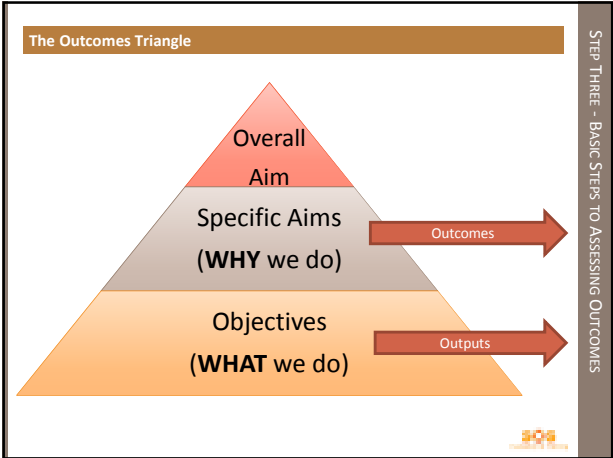
- clearly-definable & quantifiable results
- include obtaining a qualification, finding work or securing a place on a course

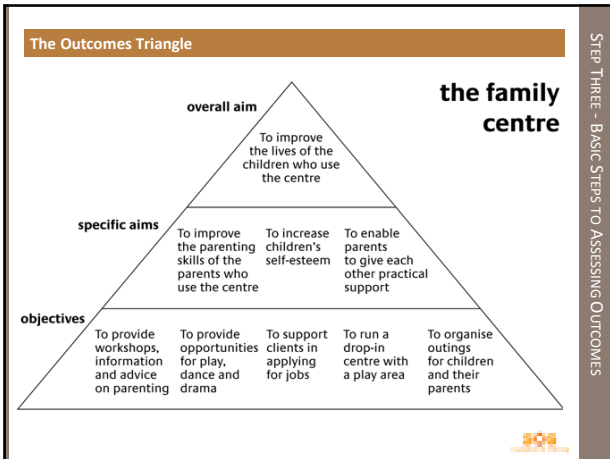
SOFT ↘

- cannot be measured directly or easily
- include increases in confidence, self-esteem, social skills etc.
- Outcomes can be expected or unexpected, positive or negative

STEP THREE - WHAT ARE OUTCOMES?







The Employment Project

Specific Aim	Example Outcomes
To enable clients to find a meaningful occupation	Improved motivation to find work Improved communication skills Improved job search skills Client finds meaningful occupation
To enable clients to maintain a tenancy	Increased ability to pay bills Increased ability in domestic tasks More tenancies maintained

STEP THREE - FROM AIMS TO OUTCOME INDICATORS

- Outcome Indicators**
- These are things you can use to assess and monitor whether the expected outcome is occurring
 - They show what has happened and can be qualitative or quantitative
 - Each outcome has at least one indicator. Some outcomes have multiple indicators
- STEP THREE - FROM AIMS TO OUTCOME INDICATORS

Examples of Outcome Indicators

Type of Project	Example Outcome	Example Outcome Indicators
Employment service for long term unemployed	Increased motivation to find work	<ul style="list-style-type: none"> Levels of attendance and punctuality Whether written CV
Health promotion campaign	Increased awareness of health issue	<ul style="list-style-type: none"> Number of enquiries to helpline Level of knowledge in target group
Refugee support project	Increased self esteem	<ul style="list-style-type: none"> Level of self esteem Level of involvement in running events

STEP THREE - FROM AIMS TO OUTCOME INDICATORS

Step Four: How and When?

Step Four:

Establish your data collection methods and think about when you will collect the data

HOW and WHEN?

STEP FOUR

- Outcome Monitoring**
- Indicators form the basis of an outcomes monitoring system
 - Information from indicators demonstrate that outcomes are achieved and show progress towards your aim, thus demonstrating impact
 - You need to collect information at least twice to be able to compare results over time
 - The main ways to collect outcome information are:
 - Self assessment by service users
 - Interviews
 - Observation
 - Record keeping
- STEP FOUR - FROM AIMS TO OUTCOME INDICATORS

The Key "Off the Shelf" Options

- **Rickter Scale**
 - Originally developed by business partners for young offenders in County Durham
 - Measure progression using a 'Life Board' and 'Frames of Reference'
 - No clear evidence of research and development work
- **The Outcomes Star**
 - Developed by Triangle Consulting on behalf of St. Mungo's Homelessness Organisation.
 - Captures the clients "Journey of Change"
 - Some research and development work with 14 organisations
- **The SOUL Record**
 - Developed by The Research Centre, City College Norwich and a Voluntary Sector Consortium
 - Measures outcome progression for adults, young people and children
 - Measures against Every Child Matters
 - Extensive research and development work with over 40 organisations



STEP FOUR - "OFF THE SHELF" OUTCOMES MONITORING SOLUTIONS

Rickter Scale – Life Board and Frames of Reference

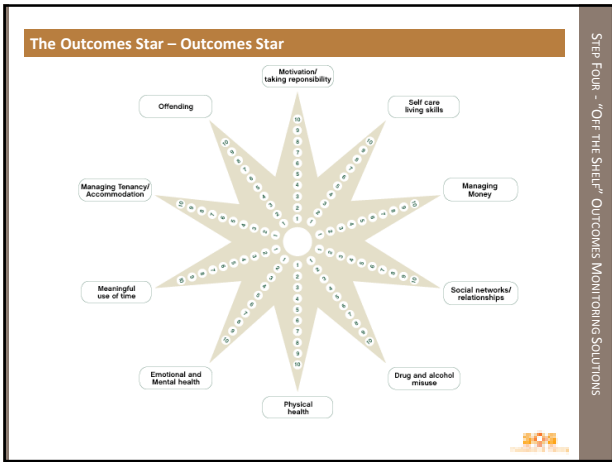


STEP FOUR - "OFF THE SHELF" OUTCOMES MONITORING SOLUTIONS

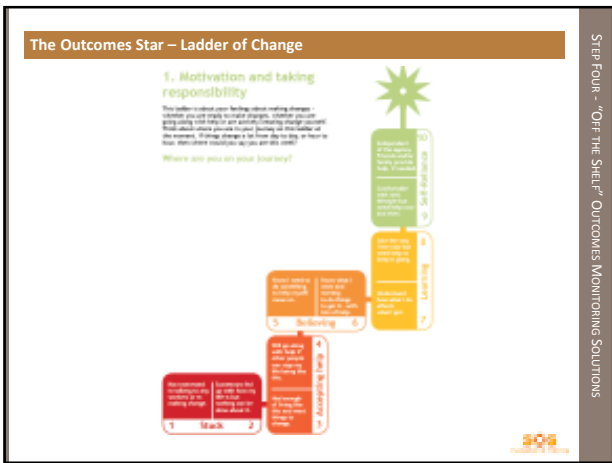
Rickter Scale – IMS-Online



STEP FOUR - "OFF THE SHELF" OUTCOMES MONITORING SOLUTIONS



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STEP FOUR - "OFF THE SHELF" OUTCOMES MONITORING SOLUTIONS

The SOUL Record – Children's Questionnaire

Name _____ Date _____ How do you feel today? 😞 😐 😊

1 = strongly disagree; 2 = disagree; 3 = slightly disagree; 4 = slightly agree; 5 = agree; 6 = strongly agree

1	I feel good about myself	1	2	3	4	5	6
2	I am good at some of the things I do	1	2	3	4	5	6
3	I try to eat healthy food	1	2	3	4	5	6
4	I get lots of exercise	1	2	3	4	5	6
5	I feel safe at home	1	2	3	4	5	6
6	I feel safe at school	1	2	3	4	5	6
7	I feel loved and cared for	1	2	3	4	5	6
8	I know who to go to, or phone, if I need help	1	2	3	4	5	6
9	I try my best at school	1	2	3	4	5	6
10	I usually remember to bring the things I need for school	1	2	3	4	5	6
11	I like playing/spending time with my friends	1	2	3	4	5	6
12	I belong to a club or group outside school	1	2	3	4	5	6
13	I care about the environment	1	2	3	4	5	6
14	I help around the house	1	2	3	4	5	6
15	I treat people with respect	1	2	3	4	5	6
16	I usually try and help other people	1	2	3	4	5	6
17	I know what I would like to do when I leave school/college	1	2	3	4	5	6
18	I am good with money	1	2	3	4	5	6
19	I like where I live	1	2	3	4	5	6
20	I wear the clothes that I want to wear	1	2	3	4	5	6

Children's Getting to Know You Thanks for helping us to get to know you

STEP FOUR – "OFF THE SHELF" OUTCOMES MONITORING SOLUTIONS

The SOUL Record – Staying Safe Worksheet

Staying Safe – Being loved and cared for

How often do these statements describe you?

- Never
- Rarely
- Sometimes
- Often
- Very Often

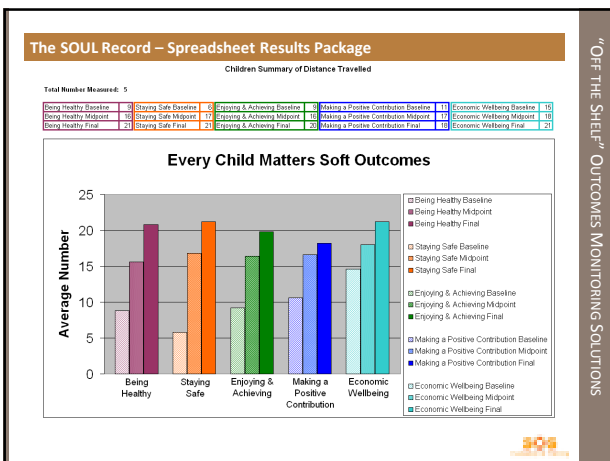
Tell me about any changes or goals you've achieved since the last time you did this activity...

Goals: Before the next time I would like to...

Points Total: _____ Previous Total: _____ Difference: _____

Signed: _____
Signed: _____

STEP FOUR – "OFF THE SHELF" OUTCOMES MONITORING SOLUTIONS



"OFF THE SHELF" OUTCOMES MONITORING SOLUTIONS

Step Five: Where?

STEP FIVE

Step Five:
Make best use of your
work
WHERE?



This Year's Fad?

STEP 5: MAKE BEST USE OF YOUR WORK

- Outcomes Measurement is more of an art than a science...
 - It's evolving
 - View 'experts' with suspicion!
- Make your findings public
 - Because not many organisations are doing it, your work will be of interest
 - Adds to the body of knowledge
 - You might even be viewed as an 'expert' (suspiciously!)
- Tell your funders, supporters, staff, all and sundry what you've discovered
- Don't stop at doing it once
 - Develop baselines and measure developments over time
 - SROI



Norwich Theatre Royal

STEP 5: MAKE BEST USE OF YOUR WORK

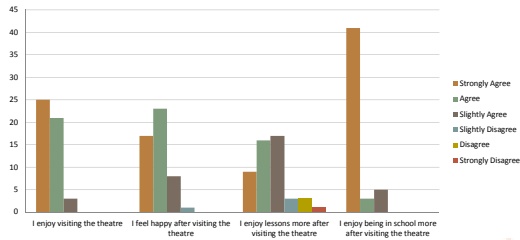
- Social Impact Report 2012
- Looked in detail at:
 - Theatre Access Project for schools
 - Get Together Group
 - Audio-described performance of Oliver for a group of teenagers with visual impairment



Theatre Access Project

- 49 pupils, half of whom were attending the theatre for the first time
- 3 teachers

Enjoyment and Happiness at the Theatre and at School

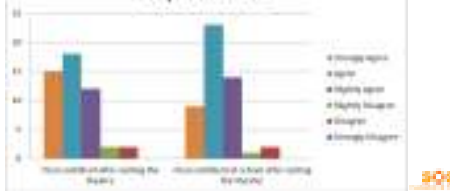


STEP 5: MAKE BEST USE OF YOUR WORK

Inspired by Theatre Visit



Pupil Confidence

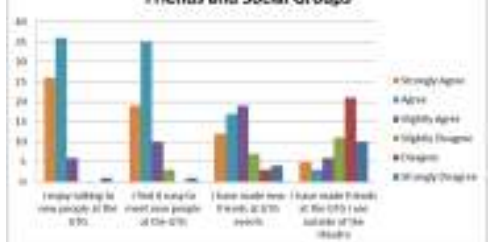


STEP 5: MAKE BEST USE OF YOUR WORK

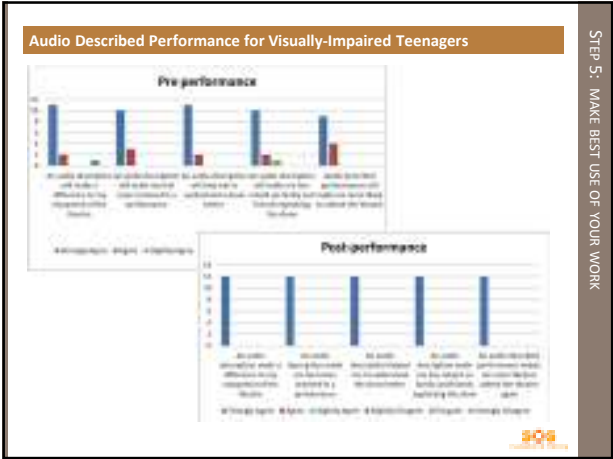
Get Together Group

- 74 members of the group were surveyed

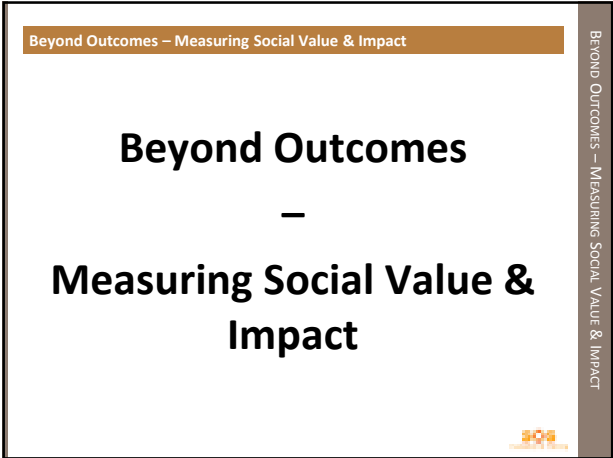
Friends and Social Groups



STEP 5: MAKE BEST USE OF YOUR WORK







What is Social Impact?

- 'Social Impact' can mean a number of different things to different people and under differing circumstances
- No one agreed definition of the term or concept
- 'Social Impact Measurement' is understanding the effects on various people that happen as a result of an action, activity, project, programme or policy
- An action or activity will have immediate and direct impact on certain people (Outcome), but it can also have a more far reaching effect on people, organisations, institutions and entities which are not directly engaging with these actions (Impact)
- Evaluation is about the quality of processes, social impact is about the changes an action, activity, project, programme or policy has brought about



BEYOND OUTCOMES – MEASURING SOCIAL VALUE & IMPACT

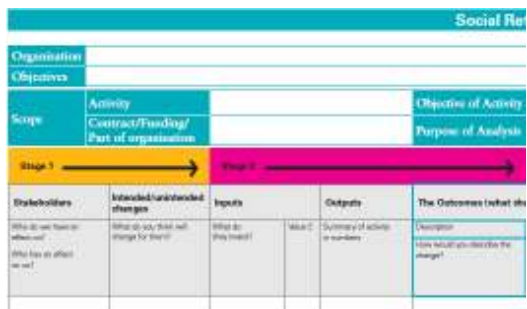
Principles of Social Impact Measurement

- Involve stakeholders
 - “can include individuals, groups, communities, local and national government and other public sector bodies with a policy interest in the outcomes experienced by other stakeholders of an activity, and any other entity or group that is either affected by, or affects, the activity to be assessed”
- Develop a "Theory of Change" to express how changes have happened for stakeholders
 - Logic Models
 - Impact Maps from SROI
 - Stakeholder Analysis from Social Accounting and Auditing
- Be transparent
 - No social impact assessment can be entirely objective, and none can entirely be free of assumptions



BEYOND OUTCOMES – MEASURING SOCIAL VALUE & IMPACT

Social Return on Investment (SROI)



BEYOND OUTCOMES – MEASURING SOCIAL VALUE & IMPACT

Social Return on Investment (SROI)

Start on Investment - The Impact Map

Name: _____ Date: _____

Start Period: _____ End Period: _____

Stage 1 → Stage 2 →

Impact	Value	Weight	Score	Impact	Value	Weight	Score	Impact	Value	Weight	Score
...

SOS

BEYOND OUTCOMES – MEASURING SOCIAL VALUE & IMPACT

Social Value Act

- The Social Value Act
 - Came into force January 2013
 - Impacts on Public Authorities' procurement
 - Will have to consider improvement of economic, social and environmental well-being
- Importance for Providers
 - Commissioners have to consider the social value of services they purchase
 - Major opportunity for providers to demonstrate their added value
 - Improved weighting against those who can't demonstrate social value

SOS

SOCIAL VALUE ACT

Social Value Act

- Don't do nothing
 - Being able to demonstrate social value of services gives competitive edge
- Makes social value central to the commissioning of services – but doesn't replace cost, quality, etc
- Have to keep commissioners on their toes


SOS

SOCIAL VALUE ACT

Summary: An Equation

SUMMARY

***5W + H =
Success***



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