SOCIAL OUTCOME MEASUREMENT DOESN'T HAVE TO BE DIFFICULT

–

5 STEPS TO GET YOU STARTED

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Step One:

Establish your purpose, scope of measurement and plan it

WHY?

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Why are you doing it?

- 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

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The Scope of the Measures

- May not need to do everything at the same time
    - 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

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Get a Plan

- Make it part of your business 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!

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Step Two:

Identify and involve key stakeholders

WHO?

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

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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?

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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

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Stakeholder Analysis: Prioritise Your Stakeholders

Power (vertical axis: Low to High), Interest (horizontal axis: Low to High)

- High Power, Low Interest: **Keep Satisfied**
- High Power, High Interest: **Manage Closely**
- Low Power, Low Interest: **Monitor (Minimum Effort)**
- Low Power, High Interest: **Keep Informed**

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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?

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Step Three:

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

WHAT?

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Outputs Vs. Outcomes, Hard Vs. Soft

OUTPUTS

are the services and facilities you deliver

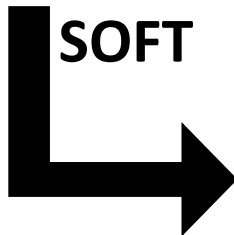include training courses, support sessions and publications

OUTCOMES

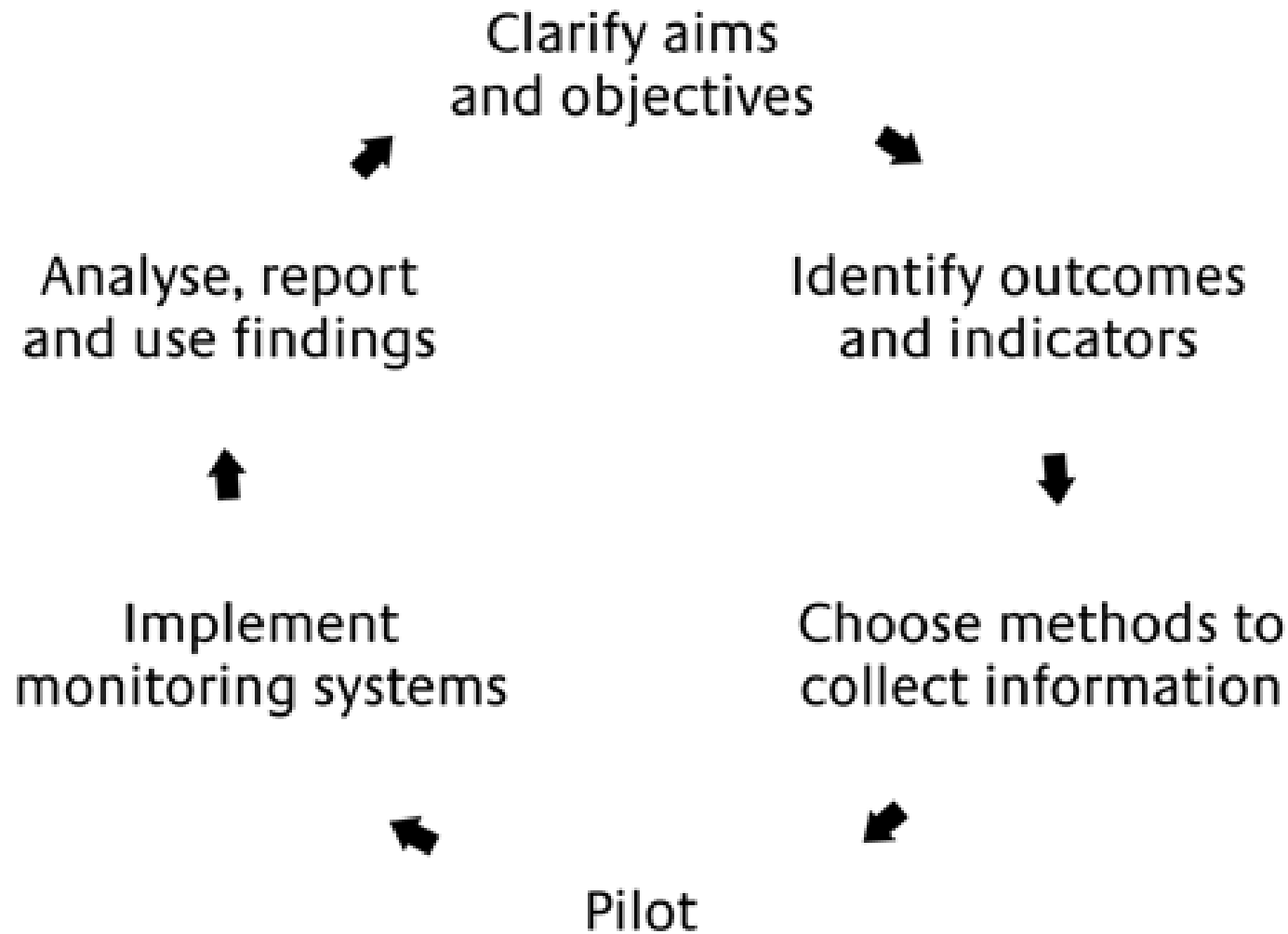all the changes and effects that happen as a result of your work

HARD

SOFT

- cannot be measured directly or easily
- include increases in confidence, self-esteem, social skills *etc.*

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

- Outcomes can be expected or unexpected, positive or negative

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The Outcomes Process

Clarify aims
and objectives

Analyse, report
and use findings

Identify outcomes
and indicators

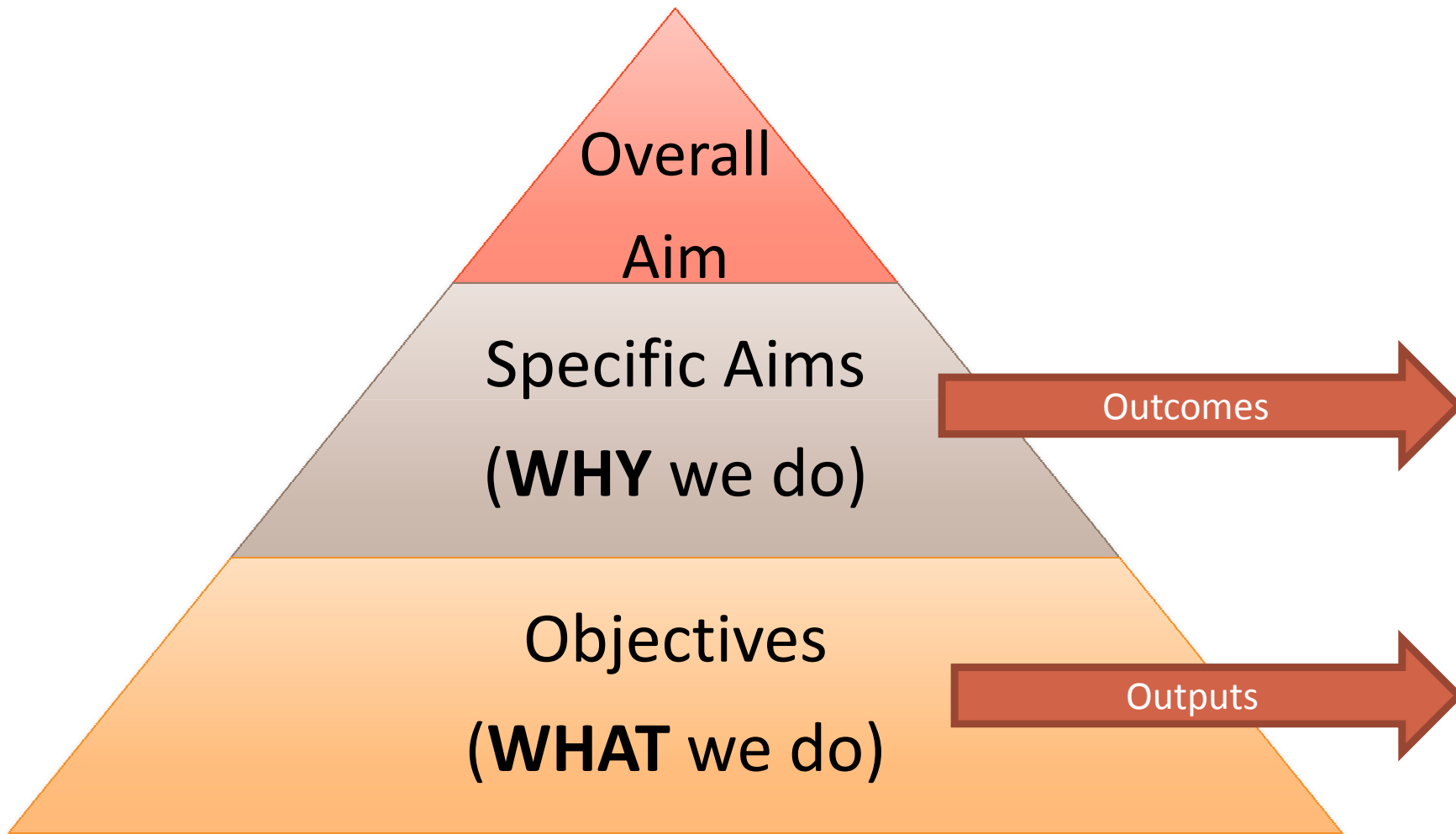Implement
monitoring systems

Choose methods to
collect information
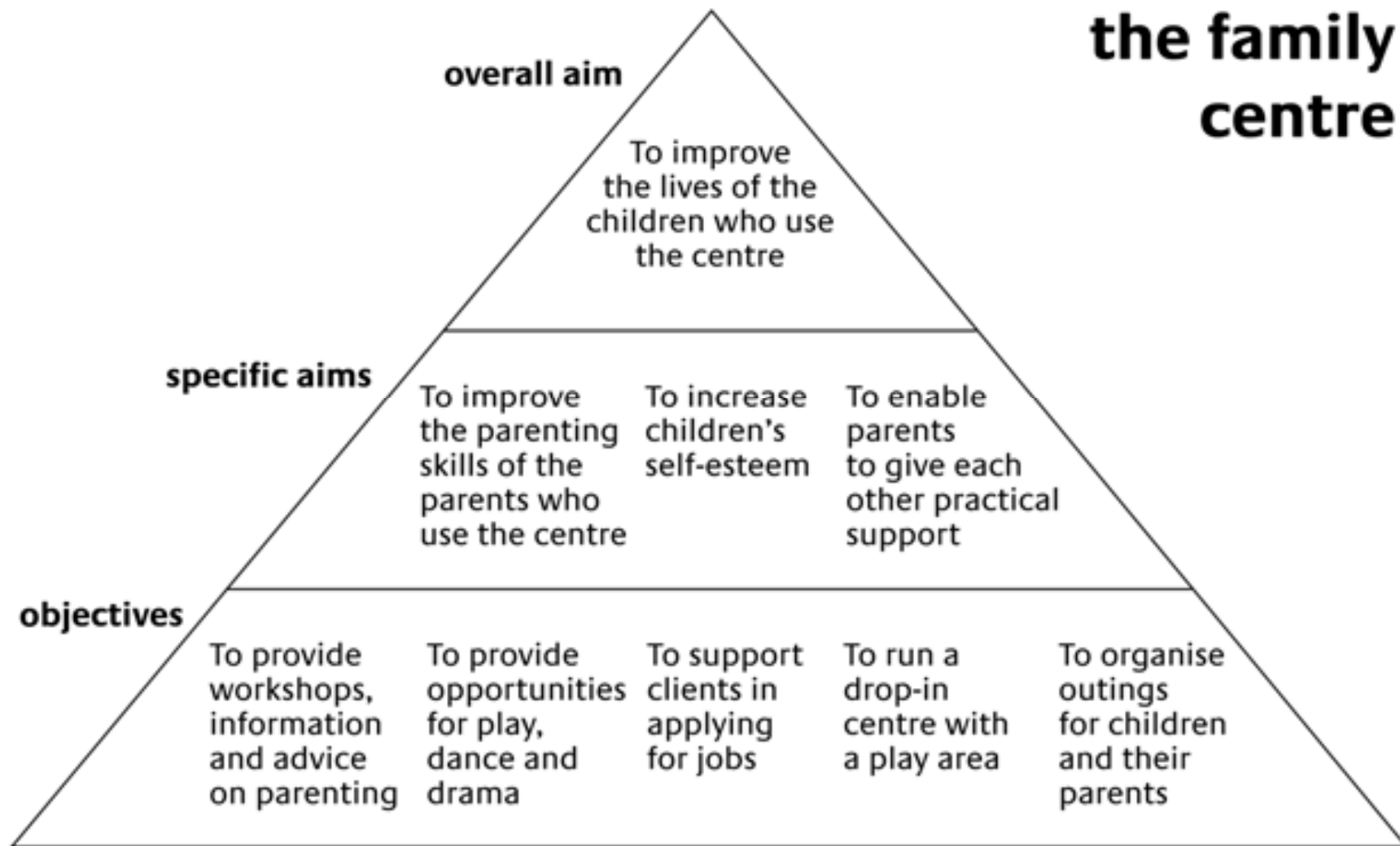
Pilot

Aims and Objectives

- **AIMS** are the planned areas of change you are trying to achieve

- **OBJECTIVES** describe the planned area of activity by which you are going to achieve your aims

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the family centre

overall aim

To improve the lives of the children who use the centre

specific aims

To improve the parenting skills of the parents who use the centre

To increase children's self-esteem

To enable parents to give each other practical support

objectives

To provide workshops, information and advice on parenting

To provide opportunities for play, dance and drama

To support clients in applying for jobs

To run a drop-in centre with a play area

To organise outings for children and their parents

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Words of Change and Activity

- To describe **AIMS**, use words like:

  To enable   To increase

  To improve   To maintain

  To reduce

- To describe **OBJECTIVES**, use words like:

  To provide   To run

  To support   To set up

  To offer

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Aims and Outcomes

- **AIMS** are the planned areas of change you are trying to achieve

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

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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

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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

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Examples of Outcome Indicators

Type of Project	Example Outcome	Example Outcome Indicators
Employment service for long term unemployed	Increased motivation to find work	• Levels of attendance and punctuality • Whether written CV
Health promotion campaign	Increased awareness of health issue	• Number of enquiries to helpline • Level of knowledge in target group
Refugee support project	Increased self esteem	• Level of self esteem • Level of involvement in running events

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Step Four:

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

HOW and WHEN?

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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

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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

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Rickter Scale – Life Board and Frames of Reference

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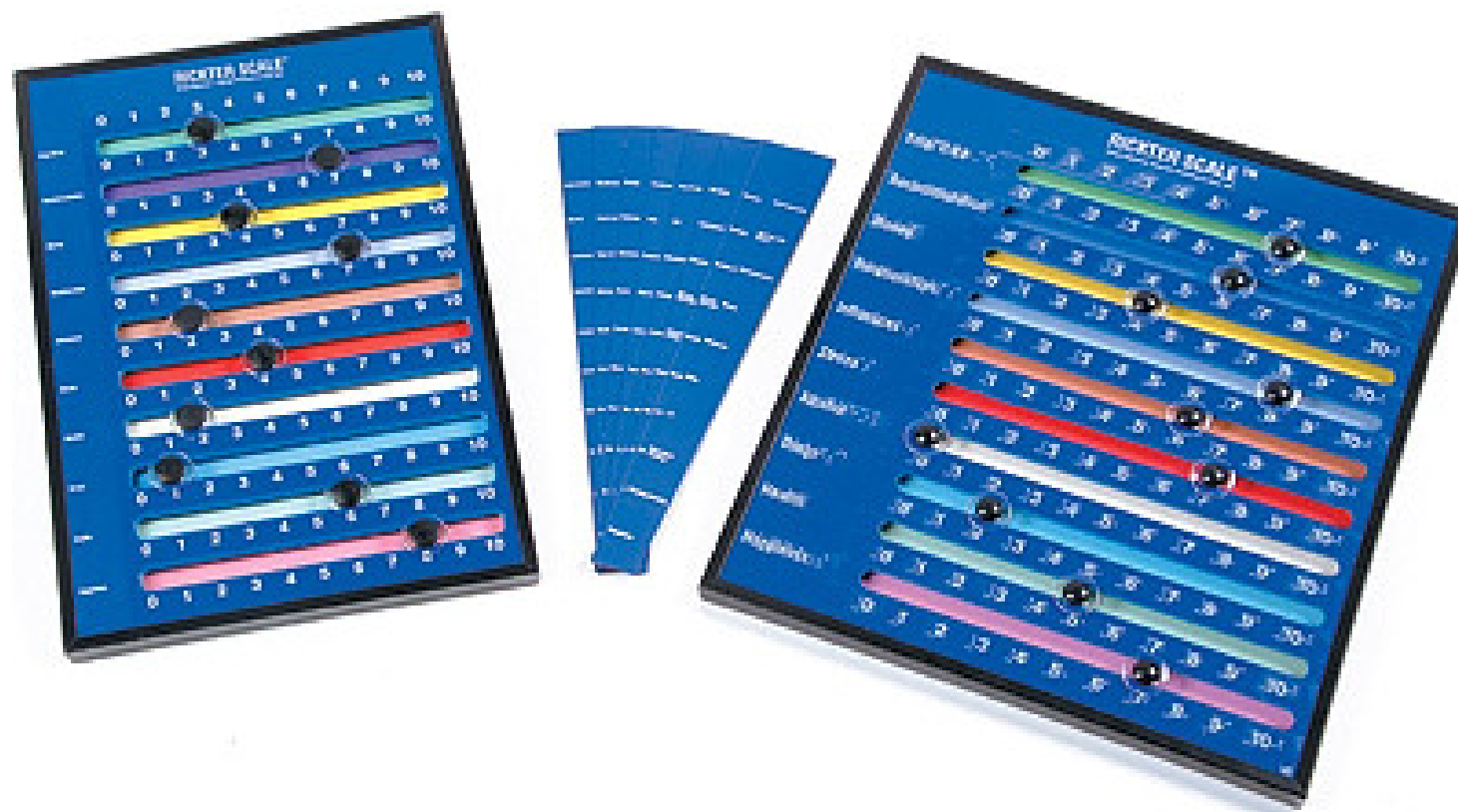
Rickter Scale – IMS-Online

The Outcomes Star – Outcomes Star
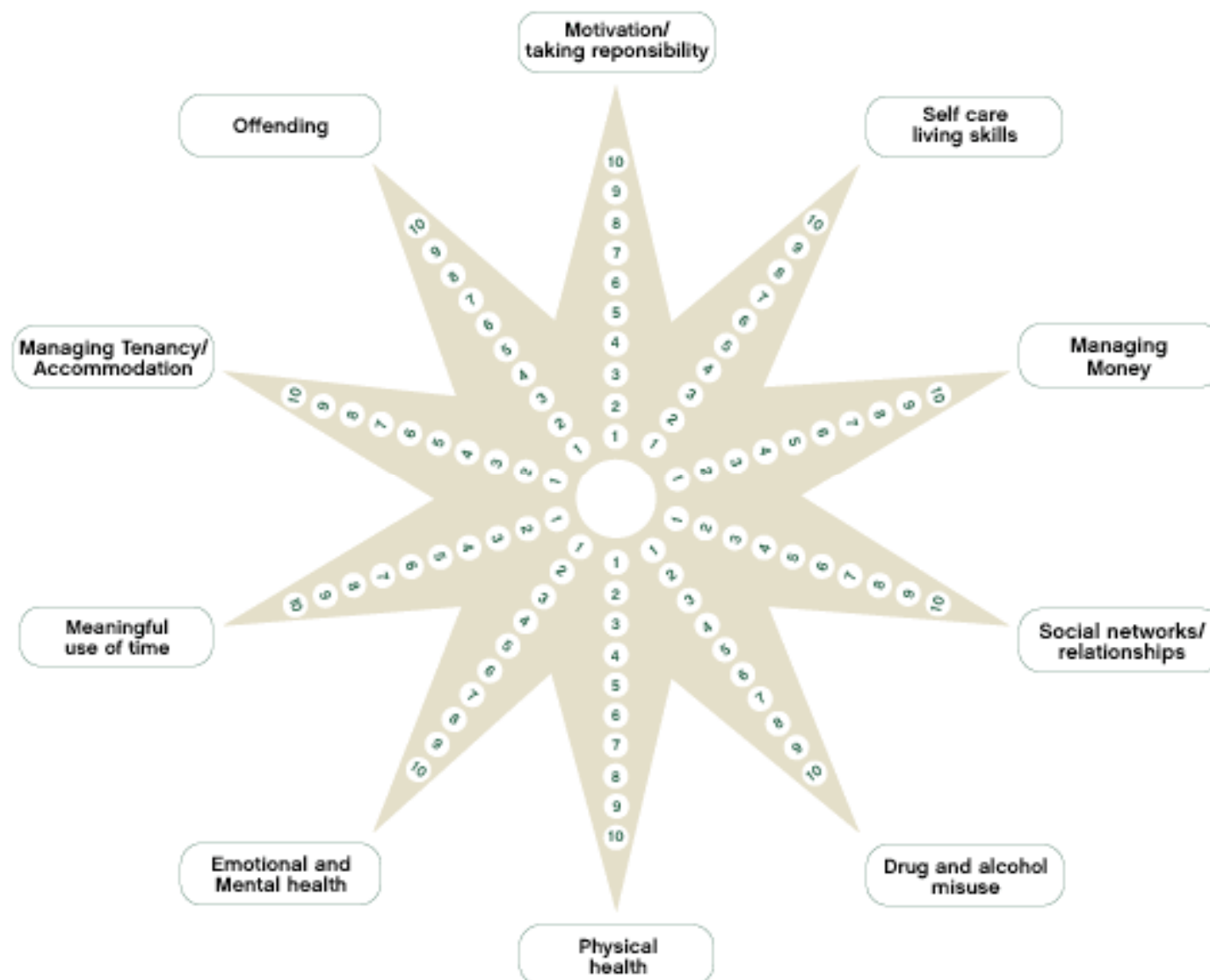
The Outcomes Star – Ladder of Change

1. Motivation and taking responsibility

This ladder is about your feelings about making changes - whether you are ready to make changes, whether you are going along with help or are actively creating change yourself. Think about where you are in your journey on this ladder at the moment. If things change a lot from day to day, or hour to hour, then where would you say you are this week?
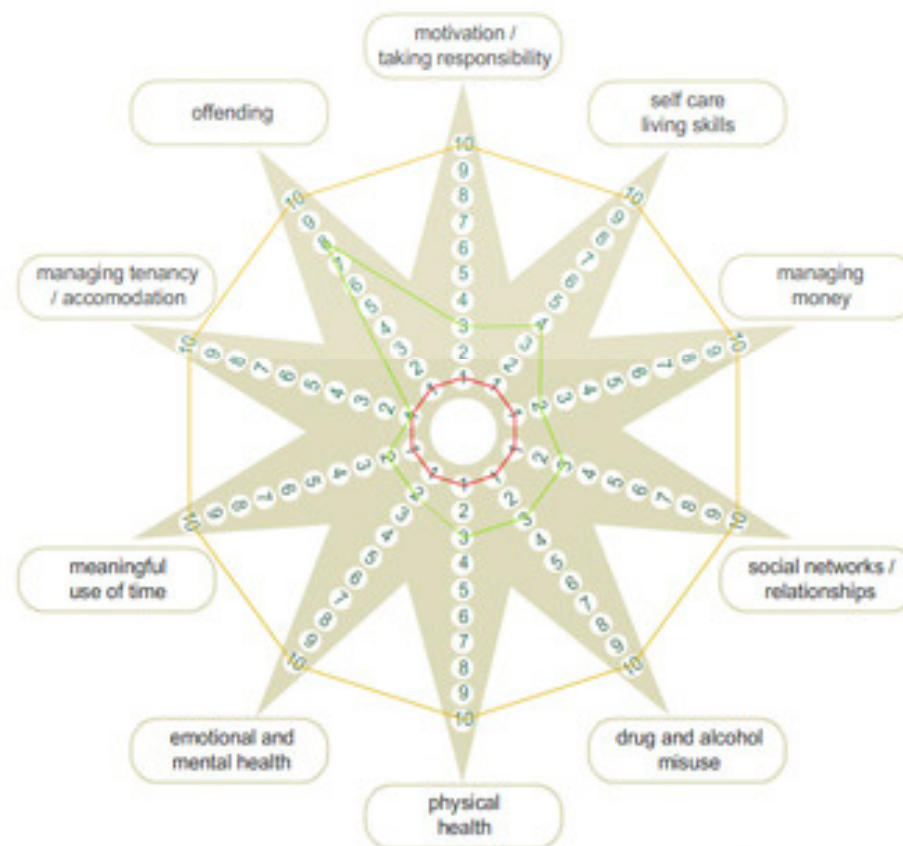
Where are you on your journey?

10 Independent of the agency. Friends and/or family provide help, if needed.

9 Comfortable with new lifestyle but need help now and then.

Self-Reliance

8 Like the way I live now but need help to keep it going.

7 Understand how what I do affects what I get.

Learning

5 Know I need to do something to help myself move on.

6 Know what I want and starting to do things to get it - with lots of help.

Believing

4 Will go along with help if other people can stop my life being like this.

3 Had enough of living like this and want things to change.

Accepting help

1 Not interested in talking to any workers or in making change.

2 Sometimes fed up with how my life is but nothing can be done about it.

Stuck

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The Outcomes Star – Outcomes Star Online

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	2	3	4	5	6
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*

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The SOUL Record – Staying Safe Worksheet

Staying Safe: Being loved and cared for

Sheet Number [   ]   Date [   ]

Which of these statements describes you?

- I feel loved………………………………………… ☺
- I can tell people how I feel………………………… ☺
- I have enough to eat……………………………… ☺
- I have enough sleep……………………………… ☺
- I like living where I do…………………………… ☺
- Someone looks after me…………………………… ☺
- I like to look my best……………………………… ☺
- I think it is important to smell nice……………… ☺
- I like the clothes I wear………………………… ☺
- People are interested in what I do……………… ☺

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

Goals: before the next time I would like to …

In order to help you think about these…

- people who love you
- anyone you look after
- when you feel hungry
- the good things about where you live
- who cleans your clothes or makes your meals
- your appearance
- who you can talk to about your day

Progress: **1 point** for each statement that describes you and for each example of achievement you have given.

5 points for every goal achieved since the last time.

Points total_____ **Previous total**_____ **Difference**_____

Signed………………………………

Signed………………………………   …………………………………

The SOUL Record – Spreadsheet Results Package

Children Summary of Distance Travelled

Total Number Measured: 5

Being Healthy Baseline	9	Staying Safe Baseline	6	Enjoying & Achieving Baseline	9	Making a Positive Contribution Baseline	11	Economic Wellbeing Baseline	15
Being Healthy Midpoint	16	Staying Safe Midpoint	17	Enjoying & Achieving Midpoint	16	Making a Positive Contribution Midpoint	17	Economic Wellbeing Midpoint	18
Being Healthy Final	21	Staying Safe Final	21	Enjoying & Achieving Final	20	Making a Positive Contribution Final	18	Economic Wellbeing Final	21

Every Child Matters Soft Outcomes
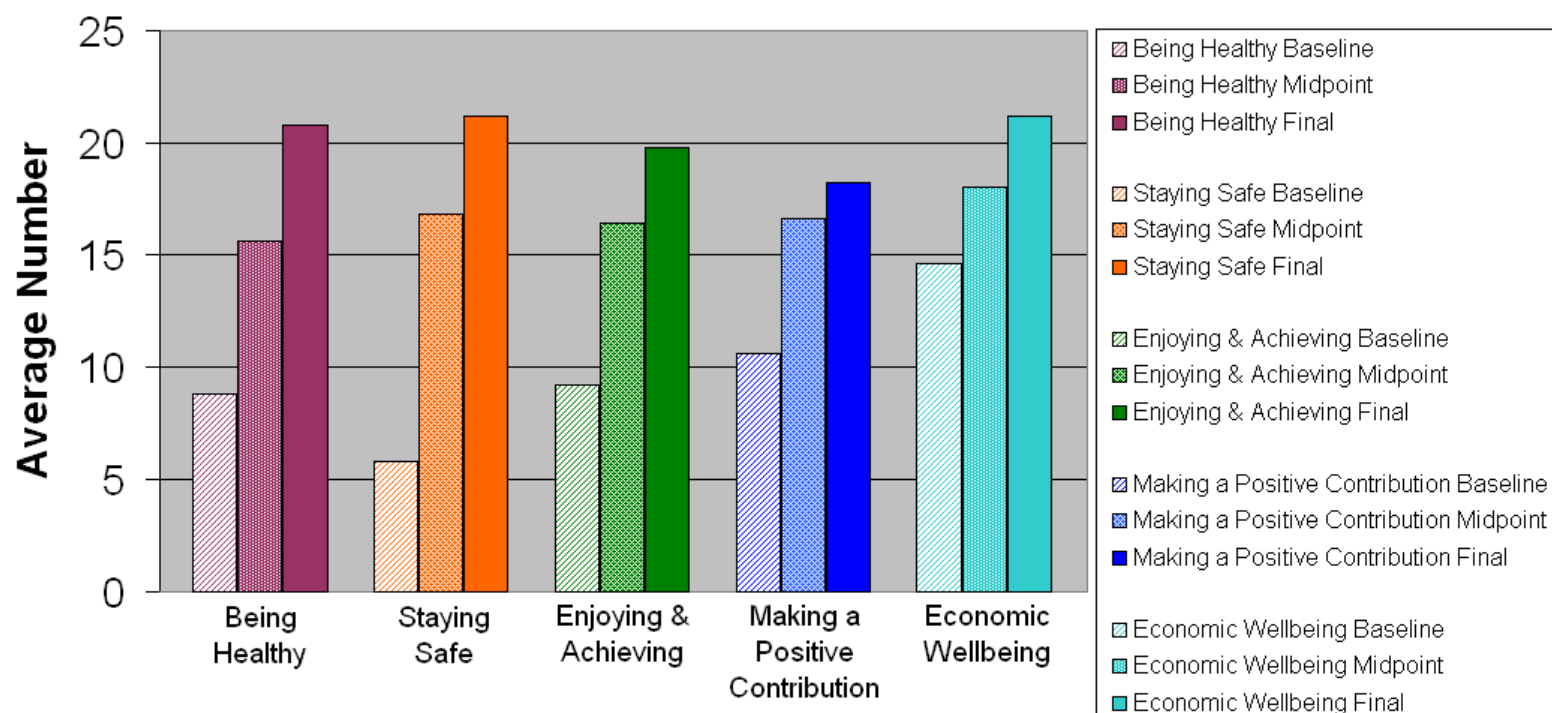
Step Five:

Make Best Use of your Work

WHERE?

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This Year's Fad?

- 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

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Beyond Outcomes – Measuring Social Value & Impact

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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

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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

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WRVS Case Study 2008 - 2011

- WRVS provide personal and practical support so older people can stay independent at home and active in their local community

- Based in Cardiff with activity throughout the UK

- In 2008, independent research commissioned to answer "Has WRVS made your life better?"

- In 2011, SROI Report commissioned to identify the savings WRVS make to local communities and organisations

- http://www.wrvs.org.uk/our-impact/measuring-our-impact

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Social Return on Investment (SROI)

- An approach to understanding and managing the impacts of a project, organisation or policy

- Based on stakeholders and puts financial value on the important impacts identified by stakeholders that do not have market values

- Requires a mix of information including qualitative, quantitative and financial

- Provides a consistent and clear approach to understanding and reporting on the changes caused by an organisation

- Also helps organisations to:
  - improve strategies, systems and accountability
  - manage risks
  - identify opportunities
  - raise finance required to achieve their mission or strategy

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Social Return on Investment (SROI)

Social Ret...					
Organisation					
Objectives					

| **Scope** | **Activity** | | **Objective of Activity** | | |
| | **Contract/Funding/ Part of organisation** | | **Purpose of Analysis** | | |

Stage 1 ➔		Stage 2 ➔			
Stakeholders	**Intended/unintended changes**	**Inputs**		**Outputs**	**The Outcomes (what cha...**
Who do we have an effect on?	What do you think will change for them?	What do they invest?	Value £	Summary of activity in numbers	Description
Who has an effect on us?					How would you describe the change?

Social Return on Investment (SROI)

turn on Investment – The Impact Map

Name				
Date				
Time Period				
Forecast or Evaluation				

Stage 3 ⟶							Stage 4 ⟶					
anges)							**Dead-weight %**	**Displace-ment %**	**Attribu-tion %**	**Drop Off %**	**Impact**	**Action Plan**
Indicator	Source	Quantity	Duration	Financial proxy	Value £	Source	What would have happened without the activity?	What activity did you displace?	Who else contributed to the change?	Does the outcome drop off in future years?	Quantity times financial proxy, less deadweight, displacement, and attribution.	What needs to be done?
How would you measure it?	Where did you get the information from?	How much change was there?	How long does it last?	What proxy would you use to value the change?	What is the value of the change?	Where did you get the information from?						

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Social Value Act

- The Social Value Act

  - Comes into force January 2013

  - Impacts on Public Authorities' procurement

  - Will have to consider improvement of economic, social and environmental well-being

- Importance for Social Enterprises

  - Commissioners have to consider the social value of services they purchase

  - Major opportunity for #socents to demonstrate their added value

  - Improved weighting against those who can't demonstrate social value

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

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Summary: An Equation

5W + H = Success

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END OF SESSION

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