The SIM Handbook

West Sussex County Council's guide to social impact measurement

west sussex county council

social impact measurement

Contents

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Section 1 Fundamentals

Chapter 1: Background

1.1 About this handbook

This handbook provides social enterprises and other mission driven organisations, (as well as commissioners and procurers) with ways in which to measure, understand and improve their social impact over the long term. Measuring the social impact of our work will help us to improve what we do and, ultimately, to improve more people's lives.

The handbook provides you with:

- background to social impact measurement (SIM)
- Definition of SIM
- A framework to understand how SIM helps you improve your organisation
- Case study examples
- SIM methods and guidance on how to use them
- A practical and intuitive way to measure social impact in an organisation
- Information and methodology that you can use in responding to calls from commissioners and procurement officers.

What makes this Handbook different?

This handbook was devised through working with commissioners and civil society organisations in West Sussex. It is the first social impact publication (as far as we know) that has been co-created with Commissioners.

In writing and researching this handbook, we ran several workshops with Commissioners and service providers across a range of services to find out what they saw as societal needs, what long term changes they wanted to see in the communities they work with, and therefore what the appropriate services are. We also looked at how they thought these changes could be measured. The workshops also allowed us to communicate the challenges civil society organisations sometimes face in social impact measurement. The specific indicators they contributed to in the indicators bank can be found in section three of the handbook. Whilst this process sits at the heart of the handbook, based on the experience in West Sussex we think the principles and content is not geographically bound and therefore can be used for organisations throughout the UK and overseas.

1.2 About West Sussex

More than 750 000 people live in West Sussex and the number is increasing. The county is made up of a coast line, a rural inland and the economic area around Gatwick Airport, known as the Gatwick Diamond.

The local economy has a large number of small businesses and skills levels can be low. The area is mainly prosperous but there are variations. The most deprived neighbourhoods are on the coast - in Adur, Worthing and Arun - and in Crawley but pockets of disadvantage are also scattered across the rural areas.

The key challenges for West Sussex include responding to the needs of a growing number of older people, providing new housing that people can afford to buy or rent and meeting the differing needs across the rural, coastal and Gatwick Diamond areas. There is a high percentage of older people and an ageing population. Most recently, there are problems brought about by the economic recession and radical new legislation both of which are affecting, and will continue to do so in the future, the way our communities receive services.

Ultimately, social impact measurement and this handbook should be about helping you and your stakeholders to solve these problems and improve life for people in West Sussex.

1.3 Is this handbook for me?

This handbook is for any organisation – small or large - that wants to gain a better understanding of the social or economic impact they have, in order to prove, improve and communicate that impact. Whether you are a complete beginner or whether you are regularly thinking, talking, telling and questioning the impact you make, this guide will help you to formally plan and measure your impact.

The information here will be useful in particular for:

- Social enterprises
- Social entrepreneurs
- Charitable organisations
- Community and voluntary organisations
- Ethical businesses
- Businesses interested in their social value.

The handbook is also for those who work with the mission driven organisations above. People such as:

- Local commissioners
- Business support and advice providers
- Community anchors, local community and councils for voluntary service
- Investors, lenders or philanthropic funders
- Public or private sector organisations seeking to better understand or work with civil society organisations.

Whatever organisation or group you belong to – you might be surprised about how simple it can be to measure social impact and begin to see the benefit.

1.4 Public Policy Context

National

The Coalition Government wants to build a 'Big Society' and civil society organisations are at the heart of that process. It aims to put more power and responsibility (for example, through the Localism Bill) into the hands of groups, neighbourhoods, community organisers, volunteers, mutuals, co-operatives, charities and social enterprises. At the moment, if you work at an organisation like this, you may be wondering how to position your organisation in the new public policy context and climate of financial austerity, perhaps when you are facing rising demand.

As plans for the 'Big Society' are put into practice, there are bound to be calls for organisations to become even better at understanding and demonstrating their impact. Think tank, New Philanthropy Capital recently argued that, "charities and social enterprises do indeed have an important role to play in building a Big Society. But two things stand in the way: an inability to provide evidence of their impact and the challenge of identifying proven, cost-effective approaches and organisations that can be scaled up to meet the challenge."[1]

It is reasonable to suspect that the best organisations could be supported, resourced and / or 'scaled up', increased in size or replicated. The less good might be subject to cuts or funding problems. Your organisation and stakeholders will decide whether the 'Big Society' is meaningful or relevant to you or not, but this handbook should provide you with information to help to demonstrate your role in it, if you wish.

From a more local perspective, West Sussex County Council has recently launched a Performance Framework for 2011/14 under the over arching principle "In West Sussex we believe in transforming futures together".[2] This will be underpinned by the following approaches:

- The Cooperative approach – which is a way to work with our communities better and closer enabling them to participate in he delivery of services.
- Living within our Means
- Active Communities
- Think Family
- Health Ambitions
- Minding our Business
- Building a Sustainable Future
- On the Move

Chapter 2: Foundations

2.1 What is social impact measurement?

What makes you a social enterprise or other civil society organisation, and what probably motivated you in the first place, is the social, economic and/or environmental impact of your organisation. You need to be very clear about your impact and understand it, because it is at the heart of what you do. You need to know what is working or what is not working, be able to improve it and be able to tell other people about it.

Impact is central to an organisation's strategy as it helps you know whether you are meeting your mission and vision in the long-term. Your team, your clients and your other stakeholders will want to know – showing your impact makes you accountable to them. Understanding, measuring and communicating impact is also extremely important for marketing purposes to win new business and secure existing customers.

Tip

Impact:

In an everyday sense, the impact of an organisation is the broader, longer-term change that it has effected in either individuals or in society, the economy and / or the environment.

There is also a more precise definition of impact, used by methods such as Social Return On Investment (SROI). In this case, the impact that your organisation has had on the outcome for a particular person or group can be calculated by measuring the outcome, and subtracting what would have happened anyway, the potential negative effects of the activity and that which was created by other organisations.

Measurement:

There are many definitions for measurement, some obviously quite technical, but think of it as, 'observations that reduce uncertainty'. Or in this context, it is anything that helps you to know better whether your organisation is having an impact or not.

You may have heard lots of different terms when people talk about measuring impact. There are many ways to describe the idea and practice of what we are talking about in this handbook but essentially they all boil down to the same thing – getting a better understanding of the truth about what you do and sharing that with the people who matter to your organisation.

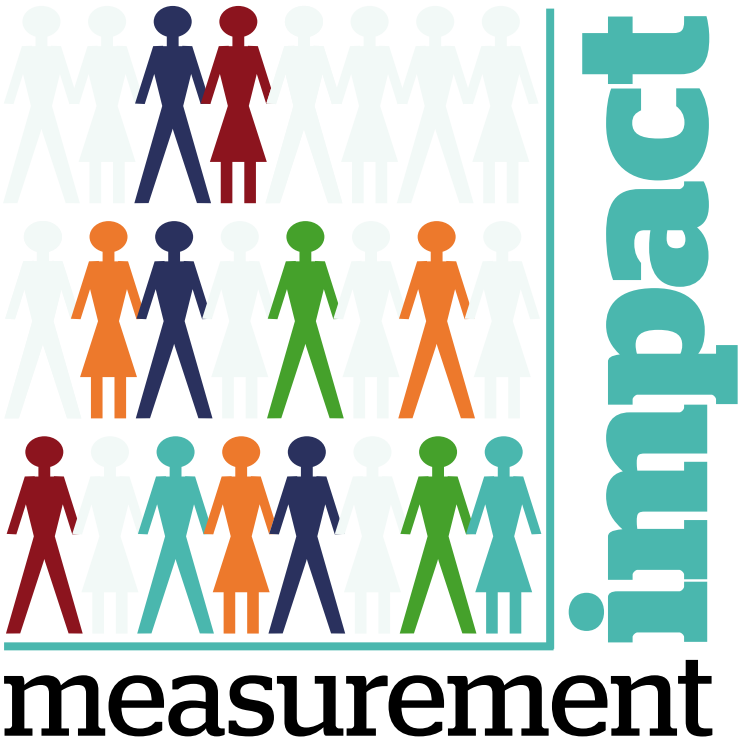
2.2 Can everything be measured?

It is not uncommon for us to feel that concepts such as 'well being', 'empowerment', confidence or 'value' are immeasurable. They are often called the soft outcomes, but are often considered to be the hardest to measure. This might be because we can't find what appear to be 'objective' measures.

This is in fact an issue of expectations: measurements used in the market are not necessarily exact and objective. Is the value of oil really objective because that is the market value? The market itself is the result of a large number of people making subjective valuations and, it can be argued, fails to include 'externalities' such as environmental costs. In this sense, what is important is not to search for a perfectly objective measure of something but to seek to help you reduce uncertainty about whether it is happening or not. In addition, you can focus on what matters to your stakeholders. It is said that Albert Einstein had a quotation on the wall of his office in Princeton that said, "Not everything that counts can be counted, and not everything that can be counted counts."

2.3 Why is it important?

In a quiet moment when you think about what success means for your social enterprise, what do you see, feel or think about? You're very likely to think of the people you will serve, the environment being improved, changes in communities or the world being better in some way - with you and your organisation enjoying it all along the way. Measuring the social impact of your organisation has a variety of benefits that can help you to create social change even more effectively.



2.4 Benefits to me and our stakeholders

Social impact measurement should reduce the uncertainty you have about the progress you are making, what your organisation does and who it benefits. It is also crucial to understand why you want to measure something before knowing what and how to measure it.

Do you want to measure to gain more funding? Or to support a decision about whether to continue to do things the way they've always been done? Is it to market your services better? Or is it to fit into commissioning frameworks or perhaps several things at once? As a guide, use measurement to:

- support decisions you need to make
- measure the things that really matter or that you and your stakeholders value.

2.5 Benefits to my organisation

There are a number of other reasons why SIM may be useful to your organisation.

Winning contracts

Public bodies should in theory award contracts which deliver social and environmental value. As a social enterprise, you should be able to demonstrate that they deliver social, environmental and/or economic benefits while carrying out the work contracted. This means you can bid knowing that your ability to prove your impact in these areas might give you an advantage.

Being accountable – trust and transparency

Civil Society organisations have a responsibility to the communities they serve and affect. Communication and transparency are important elements in building a relationship of mutual trust and understanding. Reporting on the areas where you are succeeding, as well as areas for improvement and how these will be addressed keeps your stakeholders informed and can allow them to feel part of the process or to directly feed into the process. This can be seen as a challenge but transparent reporting can elicit help from your stakeholders in meeting the challenges your organisation faces.

Making decisions

Measurement should help you to reduce uncertainty and therefore make better decisions. Clarifying the ways in which your organisation is achieving its objectives and knowing what effects it is having on the wider world can help you to make better decisions such as where to allocate resources, which project is most likely to get funding or how to scale up your impact.

Advocating for the organisation

Really understanding and communicating the work you do helps to engender a spirit of accomplishment about your staff's work. This can potentially help in the recruitment and retention of employees and help staff and others to advocate even more for the organisation. When people help to measure or evaluate the effects of something they have been involved in, they can see change for themselves and take part in celebrating it.

Keeping you on track and avoiding 'mission drift'

When there is so much to do day-to-day and different demands on your organisation from a variety of stakeholders, the mission can get lost or pulled in another direction. When the people your organisation serves or works in partnership with are involved in planning and evaluating, they can help you to gather information for decision-making and contribute to achieving the organisation's goals. This can help to keep you focused. For example, service users or clients can help ensure you've got a solution that meets their needs. Similarly, partner organisations can help you to ensure that your activities and actions are well-directed within the context of the partnership.

Securing investment or funding

If you can effectively demonstrate the value you create, then you should be at an advantage when applying for a grant or seeking investment. Including evidence of the impact of your work, or a well thought through projection of where your impact will lie in a grant or investment proposal could make the difference between getting the money or not. Funders and investors will want to feel secure that you are clear in your objectives, know how to solve social problems and can back that up with evidence.

2.6 Benefits to West Sussex and wider world

Using SIM can provide a better sense about what social enterprises and other organisations in West Sussex do, who they benefit and the realities of the social, cultural, environmental and economics worlds that they work in as well as the needs they address. SIM can also help commissioners to buy what they're really looking for – impact and solutions to problems, rather than buying activities or things that are easy to count.

Being able to understand, quantify and communicate your impact to supporters, potential supporters and users is a critical success factor for civil society organisations. Within the context of the tightening public purse organisations that can deliver meaningful positive change in individuals and society, and prove they deliver, will prosper.

Chapter 3: Before you start

Before you start social impact measurement there are some things to consider ensuring it does not become a burden.

Tips

Some possible assumptions:

1. Your impact may not be as unique as you think. Have others already measured something similar?
2. You have more data than you think.
3. You need less data than you think.
4. Ways to find new data may be more achievable than you think.

3.1 Build on what you already have

Sometimes SIM is seen as something that an organisation knows nothing about and needs to be trained in or something that you must do without any previous experience. However, your organisation probably already has an 'impact attitude' - where you are regularly thinking, talking, telling and questioning the impact you make. Building on this foundation and more formally planning, measuring and communicating your impact will help you to get to the truth about what your organisation achieves in the world.

In other words, think about it everyday. Plan to create it, deliver it, improve it and communicate it. Let that be your focus and use the definitions and tools in this handbook to help you create more impact.

3.2 Windows of opportunity

Any time can be a good time to measure your social impact but there are specific points in your organisation's lifecycle where it can be most advantageous:

- Start-up
- Expansion or growth
- Strategic planning/strategic review
- New funding
- New leadership
- Change in legal structure or business model

Whether your organisation is at any of these phases or if there is simply a strong desire to measure your social impact, it is important that there is the commitment and energy within the organisation to get the most out of it.

Being able to **understand, quantify** and **communicate** your impact to supporters, potential supporters and users is a **critical success factor** for civil society organisations.

3.3 What resources do we have?

SIM can take time and money. Starting small and building upon that foundation is a good way to develop skills, strengthen confidence and teamwork, and move towards a sustainable effort to measure your organisation's social impact.

SIM will require:

Time to involve stakeholders
In any social impact process you are likely to want to consult your stakeholders in some way, to find out about opinions or about the impact that your organisation is having.

Materials, support, or courses
Depending on your organisation and approach, you may need materials or training. These can be fairly considerable for some of the more complex or holistic approaches, like SROI or Social Accounting and Audit. For some approaches, however, resources manuals and support are available free.

3.4 Stakeholder mapping

SIM requires you to know who is affected by (or affects) your work – your stakeholders. What your organisation proves to others or how it improves are important decisions. While an organisation must take into account the opinions and needs of its stakeholders, too often

a single group of stakeholders – funders or large contract holders – determine what gets measured, and therefore what gets valued. Your social impact and value you create is more important than that.

Knowing who your stakeholders are will help you to:

- Understand the effects of your activities, whether they were anticipated or unexpected, positive or negative.
- Identify, and then respond to, their concerns and the issues they raise.

You can do this through many ways. For example, asking your staff and listing your stakeholders randomly as they come, listing them by groups (e.g. beneficiaries, key influencers, and supporters) or mind mapping them. Once you have done that, you can also think about your relationships with those stakeholders. One way is to use the following grid, or your own version of it:

POWER		
High	Keep satisfied **Major**	Engage with influence **Key**
Low	Monitor Keep in the loop **Minor**	Keep informed **Important**
	Low	High
	INTEREST	

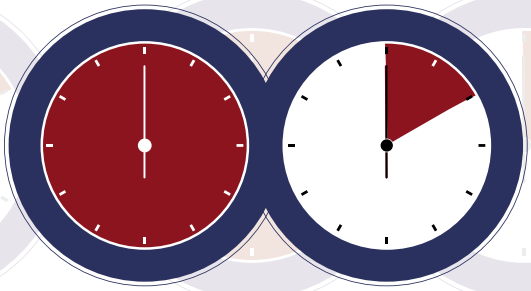
3.5 The next section's chapters lead you through social impact measurement

So far we've talked about the basics of social impact measurement, the reasons for doing it and some things to try before you start. It's now time to get stuck in with some practical steps, starting with the storyboard exercise. This can be used for the foundation of your social impact measurement. It will help you to measure what really matters to you and your stakeholders, thereby reducing any 'measurement burden' and it will help you to be clear about your organisation's impact. This will give you some actual things (outcomes, impacts or changes) to measure.

After the storyboard exercise, we outline three steps to take to measure the things that are important to you and your stakeholders. This will guide you so that you can go out and actually collect information on those things, analyse that information and then tell other people about it.

12 participants

1 storyboard



60-80 minutes duration

Section 2 The Method

Chapter 4: The storyboard exercise

4.1 Our hypothesis for change

Often social impact measurement will seek to 'measure everything and tell absolutely everyone about it'. This will drain your resources as an organisation as well as yourself personally and will be quite ineffective! In order to find out what you need to measure – or what is most important for you (and your stakeholders) to value, you can use a storyboard.

4.2 The storyboard exercise

Purpose and Overview

The Storyboard exercise provides an opportunity at the start of a project (and its evaluation) of bringing people together who stand to benefit (or who are already benefiting) from the work of an organisation, in order to plan the detailed actions and activities that need to be undertaken, identify where to look for evidence of impact, and generate interest and buy-in from potential partners. It is sometimes called a 'logic model' or 'theory of change model'. You may have done something similar to this in the past, but it will still be useful to ask the questions and consider working through the model.

What does it measure?

The tool provides a way to describe the story (hypothesis) of how the activities of the enterprise bring about not only the short-term outputs but also the medium and longer term outcomes, thereby providing the necessary information for choosing indicators to measure progress towards meeting objectives.

Who with

Invite up to about 12 participants drawn from a selection of potential beneficiaries who might be affected by or are able to affect the work of the organisation. Ideally include people who have good knowledge of the project as well as those who would like to learn more, including potential or actual project partners (such as someone from the local authority, or the local school).

The Storyboard is designed as a one-off exercise, however, if there are a large number of people that need to be included in the project and evaluation design, then the exercise can be repeated with different groups and the findings combined onto a large Storyboard poster.

How long does it take?

Allow at the very least 60 to 80 minutes to work through the stages of the process. To get the most out of the exercise, it is recommended that it is used as the basis for a ½ day or day's stakeholder workshop.

4.3 Step by Step

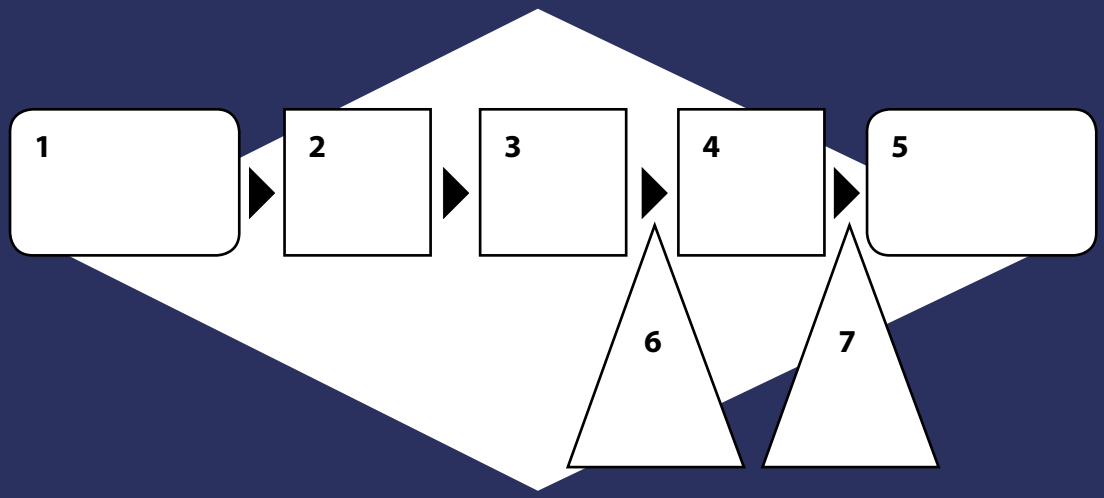
The Exercise

1. Make sure the invited workshop participants have a grasp of what the proposed community enterprise is all about.
2. In the light of that knowledge invite them to read through the eight questions in the left hand column of the table below. The prompts in the right hand side can be used by facilitators.

Questions	Prompts
1. What is the context in which your organisation operates, in terms of citizen's needs?	You could describe the needs you address for citizens **now**, or the **local or wider need** that you hope the project will address. So this could be anything from 'bigger picture' issues like increasing unemployment or people living longer, to personal needs such as housing or a need for changes in behaviour, or something else completely different.
2. What are the main activities that are undertaken (or planned) as part of the organisation's day-to-day running?	These could include obtaining resource, running events, your major services, weekly newsletter and involving people in different ways as well as setting up the structures necessary to run the organisation. Anything that comes to mind.
3. What initial results or changes have you seen (or would expect to see) as a result of these activities and actions?	"Changes" could be in the immediate attitudes of people affected by the organisation, as well as more visible, physical changes to the area. These changes are the ones that happen almost straight away, such as x amount of people attending an event, or gaining a new skill. You can ask, 'what happens first when people attend the workshop, or receive the training, or buy the product?'
4. What medium-term changes do you expect to see as a result of the work of the organisation?	You could define "medium-term" as 8 to 16 months and define "long-term" as beyond 16 months from today's date. However, this of course depends on the nature and stage of development of the organisation. At this stage focus on positive changes – but make a note of potential negative effects as part of Question 8 below.
5. What are the long term changes you create for: a. Citizens. E.g. Independence, well-being? b. What are the impacts on society or the economy more broadly?	
6. How do the initial results (from Question 3 above) lead to the medium-term changes that you identified in response to Question 4?	Questions 6 and 7 present an opportunity to explore the assumptions that have been made that one change will automatically lead to another. To test the assumptions about those changes you need to be clear what else needs to happen or be part of the experience to make it so. For example, just increasing customer base may not be enough to ensure people are eating healthier; perhaps some additional intervention, such as support or guidance on how to prepare particular dishes, or what to do with new and unusual vegetables will make this more likely to happen. So try and describe precisely how each of the more immediate changes will lead to further changes in the future or for a wider group of people. Sometimes asking "why is that important?" or "so what?" of each thing you mentioned in response to questions 3 and 4 can help with this.
7. How do the medium-term changes (from Question 4 above) lead to the longer-term changes that you identified in response to Question 5?	

Questions	Prompts
8. What challenges or barriers have you encountered (or foresee) in terms of: operational challenges; policy/ regulation barriers; other issues?	This question is a useful opportunity for a reality check.

1. If you are doing this with a group, divide the group into pairs or threes and ask them to use the questions (and the prompts in the right hand column) as the basis for having a conversation about the organisation. Suggest that one person asks the questions and the others describe 'their take' on how the project works (or might work).
2. Ask participants to record their responses to each of the questions on a separate post –it note, indicating the number of the question they are answering in the top left hand corner of the post-it note.
3. Prepare a large poster, spread across 2 x 2 sheets of flipchart paper, copying the design illustrated and attach it to the wall for all the participants to see.



4. Invite participants to attach the numbered post-it notes they have prepared to the appropriate boxes or triangles on the poster corresponding to the eight questions above.
5. Once all post-it notes have been attached to the poster, bring people together to view (and where necessary, explain) their responses. Discuss the extent to which the completed Storyboard represents a true picture describing how the work of the organisation / enterprise might have an impact.
6. The completed Storyboard will provide a stepping-off point for building a formal Impact Map. It holds important information in terms of stakeholders that will be needed for deciding what to measure to provide evidence of impact as the organisation strives to achieve its objectives.

Once you have discussed each question in detail, summarise the answers that you come up with in each of the corresponding numbered boxes on the flow chart. You can do them in any order (start with the easy ones). Feel free to add extra comments to boxes as and when ideas occur to you during the conversation.

Tip

Using the storyboard with a variety of stakeholders

The storyboard technique can be used in a very conversational way with a facilitator who is familiar with the tool. They can guide a group in conversation and record relevant parts on the storyboard as the discussion unfolds.

This frees participants from having to think about recording their own thinking. This is a truly conversational approach and is particularly well suited to use with young people, or people for whom English is not their first language

4.4 The next section

Now that you have done a storyboard, you can use this to build up your social impact measurement in the most appropriate way for your organisation. This is your hypothesis or evaluation framework. If this is the 'story' of how you create change, you can now go out and do three things to 'test' that hypothesis. The next chapters look at three steps to take that will help you to do this.

Section 3
Three steps for measuring social impact

Chapter 5:
Step 1 - Source your impact

Tips

Throughout your SIM work, keep coming back to the following questions:

- What do we (or somebody else) already know?
- What do we need to find out? (Your storyboard should help with this)
- Who do we talk to and about what?
- How do we talk to them?

5.1 What it is and why is it important?

Following the storyboard, you should have an idea of what the most important things to measure are. You will now need to source, or collect information about these things you have identified.

There are a number of ways to collect information at various points in the course of planning, carrying out, and evaluating the work that your organisation does. It's important to be realistic about what information is most needed and the resources that your organisation has available. There are many ways of sourcing information including stakeholder perceptions, existing data and new research that you carry out yourself.

5.2 Start with what you feel

Often social impact measurement and related concepts are thought to be something that is about a formal, scientific process only. However, in this handbook – we also emphasise the importance of improving the existing understanding of the impact you already know internally. Instinct, intuition, 'gut feeling, and 'going with your heart' are likely to be well known feelings for people in the social economy. These often help frame our decisions and can help organisations get a sense of how they are performing or where their impact lies. If you ask yourself, 'what needs do we really address? 'Or 'what long term changes are created by our organisation?' and actively listen to what you feel or the thoughts that arise, then these can be of immediate help and even be the start of your measuring impact work.

It may not be appropriate to fill in a funding application with, "I feel we have an impact", but given its likely importance to what you do, there is no reason why you should not make it part of your personal social impact measurement toolkit.

Tip

Just enough

You don't necessarily need great precision in your measurement. So if you're just looking for information to support decisions or enough to satisfy your stakeholders, you don't always need in depth research or information.

5.3 Ask, what data is already out there?

You do not want to reinvent the wheel. Rather than thinking that the impact is not measurable or that it is too overwhelming, you can start by asking what data is already out there? If you find an interesting study or academic paper for example – you can use this to demonstrate there is a need for your work, or that your particular way of doing things has an impact. This will have credibility and will be the result of many hours of work that you can draw upon to make the case for your organisation. This is particularly useful for demonstrating the need for your project or organisation. According to recent work by the National Council for Voluntary Organisations, "every charity should have an up-to-date, holistic and evidence-based understanding of the needs they are addressing."[3]

You can do this through online search engines. Search for words like 'PhD', 'study' or 'research' next to the area (e.g. 'social care' or 'community café' or 'health inequalities in Yorkshire' rather than just "health inequalities". You can also see whether national organisations relevant to your work, umbrella groups or think tanks have written reports that you can use. Other potential sources include:

- Economic and Social Research Council
- Third Sector Research Centre
- Government information sources, such as the Office for National Statistics which has a range of data, from demographics to economics and also produces an annual Social Trends publication, or Communities and Local Government
- Think tanks such as The New Economics Foundation, Demos, the Centre for Social Justice and the Joseph Rowntree Foundation.

5.4 Are you already collecting information?

Perhaps you are already collecting data that will help you to make the decision or communicate to your stakeholders what it is they want to know. Use all the data you have. Or if you are not already collecting it, there may be the potential for doing so quite easily.

For example, do you already talk to your beneficiaries on a weekly basis about what they think of your service? Can you include a few extra questions or a baseline measure to expand this conversation?

Tip

Sitting on a gold mine

You may already have lots of data. Sometimes civil society organisations are sitting on better information that they realise and simply need to analyse and communicate it. Try using some time to go through your computer / network or talk to staff about what you already have. For example, phone call logs or event participant numbers, monitoring data for funders, case study interview transcripts or a mind map you drew in a meeting.

5.5 Collecting new information and your own data

You will need to think about who you will have to approach to get the information that you need. Organisations with large groups of people to survey may want to approach a sample of the total group, asking only a percentage of people chosen at random to respond. It is also important to choose an appropriate format for collecting information based on whom you are asking and what you are asking about.

Having some of these methods to hand to help, whether it is controlled experiments, surveys, interviews, observation or simply adding your thoughts to those of existing research, will help you to improve your understanding of the impact your organisation creates. Below follows some methods which may be useful.

Interviews

Interviews are conversations (often 1-1, by phone or in person) with your stakeholders and are one of the best ways of collecting information.

Interviews can give you:

- Identification about where your impact lies
- Enhanced clarity about how your organisation's work creates an impact
- Allows interviewees to construct their own accounts of their experiences by describing and explaining their lives in their own words (rather than yours or via a questionnaire).
- Ideas for improving a situation
- An improved and deeper personal relationship with your stakeholders

Find out what your stakeholders think...

Questionnaires

You may want to find out what your stakeholders think or experience through a questionnaire. It is worth remembering that:

The need for a survey should arise from your objectives and what you need to find out, rather than a general idea that you need to do a survey.

Questionnaires can require more work than you sometimes imagine to ensure they ask the right questions in the best way possible.

There are various ways of finding out what to include in your survey. This handbook recommends doing a storyboard and using the material in that to form the basis of the questions that you need to ask. You can also formulate the survey in a more ad hoc way and include those things that you know need to be measured.

All questions included must be really needed and should be something that respondents are likely to be interested in, i.e. something that is material or important to them. If the length of the questionnaire is excessive, you may find you get less responses or the quality of the information you get declines. Generally, if a questionnaire exceeds 30 minutes in length to answer, you will need to think about shortening it.

Tips

Question formats and examples

There are many ways to question people, depending on your aim. The questions below are intended to provide some examples and ideas for structure and format as well as the sorts of things that may be relevant to your social impact measurement work.

Q. Please tell us whether you agree or disagree with the following statement[s].

Agree, Strongly Agree, Neither disagree or agree, Disagree, Disagree strongly

As a result of the service I am better able to look after myself

As a result of the service I have made new friends

As a result of the service I am better able to look for work

Please tell us the reason for your answer

Q. Before you attended the event, how knowledgeable were you about what social enterprise does and how? (0 = not at all; 5 = extremely)

0, 1, 2, 3, 4, 5

After the event, how knowledgeable were you about what social enterprise does and how?
(0 = not at all; 5 = extremely)

0, 1, 2, 3, 4, 5

Q. How often do you find your job…?

Never, Rarely, Some of the time, Often, All of the time

Interesting

Stressful

Exciting

Etc…

Q. How many useful contacts have you made that you attribute to your involvement with our organisation?

0, 1-3, 4-6, 7-9, 10+

What sort of benefits (support, money, contracts, friends etc…) have those contacts brought you?

Q. How safe do you feel walking around after dark?

Very safe, fairly safe, not safe

Case Study

A questionnaire can be simple

Take the example of a rural arts centre. The centre is a mixed use venue including a theatre, cinema, two gallery spaces, a media lab and a performance studio together with a riverside cafe, bar and restaurant.

They have a pragmatic and flexible approach when it comes to questionnaires and data capture. For long-term interventions or when larger amounts of funding are concerned standard type questionnaires are used.

There are, however, instances when more accessible data collection is appropriate. In November and December the centre runs outdoor community art and celebration events (for instance around November 5th) and a two page questionnaire would be, at best ignored by participants and, at worst deter participants from attending again. In these cases postcard format feedback forms with no more than three questions involving yes, or no are used.

A fundamental question asked is "Would you recommend this event to a friend?" This is seen as a good gauge of the success of the event in question.

5.6 Other ways to research your impact

Remember that interviews and questionnaires aren't the only way of researching and collecting information. When collecting information about something you've identified in your storyboard, it will be helpful to think about which method will gather the most useful information in an effective way. For example, you might think that a questionnaire at an event would give you useful information. However, why not use a combination of recording quotes on a mobile phone and asking people to write one thing they will take from the event and one area for improvement on a wall poster?

Below are some other ways you can use:

- Minutes of meetings.
- Attendance records from events such as paper registration information or from online systems such as Eventbrite.
- For open feedback and quotations, try giving people blank speech bubbles to write in. Sometimes people are more comfortable writing in this way than on a form.
- Set up a focus group.
- Take photos that tell you something about your work and impact.
- Use a 'flip' camera or phone to capture video.
- Visual journals or mood boards provide pages or a poster that can consist of images, colour, texture and text. Designers use mood boards to develop their concepts and to communicate to other members of the design team.
- Online survey, e.g. www.surveymonkey.com.
- Online polls, e.g. http://polldaddy.com .
- Reflection exercises such as Look Back Move Forward, which asks participants to nominate high points and low points across a timeline: http://www.pluggingtheleaks.org/downloads/facilitation/f_project_reflection_workshop.pdf
- Use a dictaphone or mobile phone and record interviews or quotes.
- Rather than a long feedback form, try a suggestion box and ask for feedback on a piece of card.
- Combine some of these in a workshop or an event where you and your stakeholders discuss and talk, then capture photos, audio and visual data.

Case Study

Really knowing your beneficiaries

The Bromley by Bow Centre is a community organisation in London. They support families, young people and adults of all ages to learn new skills, improve their health and wellbeing, find employment and develop the confidence to achieve their goals and transform their lives.

They are also very clear about the needs they are addressing and have sourced information about the context in which they are operating and their impact. They have used:

- Census information about their local population
- Anecdotal evidence and what GPs feel are the problems from working there day-to-day
- Academic research about health problems in the area as compared to national averages
- Their own research into the health of their beneficiaries

As they say on their website, "The Bromley by Bow Centre has engaged with a number of partners over the years to measure the true health of the local community, and we want to continue this work. It is not always easy in a fast-changing and diverse community, but it is important to help us understand the issues facing Bromley by Bow and measure the impact we are making in tackling these issues."

Read more about how they source their impact at: www.bbbc.org.uk/pages/bromley-by-bow.html

5.7 Source information using different methods

Finally, some organisations tend to use just one method for gathering information. For example, they have a gut sense about whether they are having an impact or not and they leave it at that. Or, they carry out formal research on their impact and produce beautiful graphs and tables to demonstrate it, but don't have a good intuitive sense of whether they are making a difference and subsequently miss where some of the value is. Using more than one method will ensure the information you collect really is valuable to helping you understand and tell others about your impact.

Try this…

1) Measure what matters and start small

It is extremely likely that your work will comprise of many parts and that there are many different ways in which your organisation makes a difference. Don't do too much at once however. You can start (or go back to) thinking about, 'if we had to choose one thing, what is the most important thing for us to measure'? Look at your completed storyboard(s) and prioritise one or two things from there. Or have a look at the indicators in Section Four of this handbook and choose one or two indicators to measure. You can then measure them well and when you feel ready, collect information on other things.

2) Measure the before and after effects of your work

When you are collecting information about the effects of the organisation's activities, it is possible that you will need to measure changes over time. The simplest way to think of this is what happened when people came to you and then what happened after they received your service, or took part in your activity?

Questions with scales are a useful way of doing this. For example, on a scale of 0-10, you might ask someone how isolated they feel when they come to you. Then 3 months (or whatever time frame is most appropriate), you would ask them again, on the same scale.

If you did this individually with a group of beneficiaries, it would tell you:

- How many felt less isolated
- The average starting point on the scale (this is also evidence of need)
- The average end point (what has been achieved)
- The average amount of change (this would be the difference between the above).

You can also look at the numbers of people who stayed the same (which could actually be an achievement) or got worse. This is quite straightforward but would give you a good idea and evidence about the journey your beneficiaries are making. And of course, it can be used with a range of outcomes, not just isolation.

3) Conduct a thought experiment

A frequently used technique in academia is to use control groups. As a voluntary group or social enterprise, you are unlikely to have the resources to set up a control group to study something. However, you can still learn a lot from imagining this. Let's say you wanted to measure the effect of a particular way of doing things, for example, employee ownership. Imagine you are an alien with the power to create separate organisations and that you would create two identical organisations, but one is owned by the employees and one is not. Then you press play on reality and observe.

What do you imagine you would observe – in any way, directly or indirectly – that would change for the employee owned organisation? Would you expect decisions to be made differently, would this mean those decision are better or faster? Would employees require less supervision? Would you have less management overhead? Would employees be more motivated to serve the beneficiaries or customers? If you can identify these types of issues that would be different between the two cloned organisations, you are on your way to identifying things that you can measure and report on in your organisation.

Take it further…

1) Get the most out of your interviews…

Once you have done a few interviews, it is quite easy to carry them out on 'autopilot'. Rather than just extracting data, the purpose of an interview is to see your work and the organisation's impact from the perspective of that person.

These ten tips will help you to take interviews further:

1. Identify the list of people who you need to interview. This does not necessarily need to be representative in any particular way but should be focused on the people who matter to your organisation or project.
2. Define or revise the questions for each interview.
3. Schedule appointments and decide whether to send the questions in advance.
4. Take some time before the interview to relax and ready yourself so that you can make the most of the time you have with the individual.
5. During the interview listen with an open mind and heart.
6. Suspend your judgement about whether their opinions or experiences are right or wrong and try and see the situation through their eyes. What matters is to gain a better sense of what the social impact is.
7. Take notes or transcripts and if questions occur to you during the conversation, feel free to deviate.
8. Don't be afraid to ask really simple questions.
9. Actively listen and allow for silence.
10. After the interview has finished, take time to reflect, capture any thoughts in writing, notes or diagrams.

This should allow you to create transparency and trust so that you are building the relationships you have with your stakeholders.

2) Get the most out of your questionnaires

Questionnaires work best when you ask the right questions in a smart way. Questionnaire design is a creative process but you should seek to ensure you eliminate design that is likely to give you bias or unhelpful results. For example:

Two questions in one

"Have you used the new park facilities or community centre in the last 6 months?"

This is two questions in one and they should be asked separately so you can be sure which part of it the respondent is answering.

Leading or loaded questions

If you include a question that gives a hint to your own view – it will lead the respondent to an answer and bias your results. For example, starting a question with, "Don't you think…?" would have this affect. A loaded question is one which is emotionally angled so that the respondent is encouraged to give a certain answer. For example, "do you think that the recycling and waste scheme in the organisation is crucial to the survival of the planet and the future health of our children?"

Scales and attitude measurement

Surveys should also ensure that scaled choices provide an equal opportunity to answer as the respondent wishes. Attitudes and opinions are some of the most difficult data to collect. The link between attitudes and behaviour is often unclear or unreliable. For example, an attitude in a survey may not be a reliable guide to behaviour because people do not always behave as they say they do. That said attitude batteries can still provide a useful way of obtaining information without overburdening the respondent. Attitude statements need to be carefully selected from a range of statements and should not be dominated by extreme views.

3) Try using participant observation

One way of collecting data that is sometimes missed is a method often used by social scientists such as anthropologists. Participant observation allows you to participate and observe something in order to collect information. For example, it might involve participating in an event / talk / conference by deliberately immersing yourself in its routines and relationships, writing accounts of how these events, relationships and conversations developed and what was learned from them; and observing by sitting back and watching activities unfold and recording impressions of these activities in whichever way is appropriate at the time, e.g. field notes, tallies, dictaphone, or a stream of consciousness in an end of day field diary.

To record information through the participant observation process, start by stating what outcomes you are seeking to measure at the top of a page.

You can then:

- Systematically grade or write notes underneath the outcomes on a clipboard during the event / conference / talk.
- Through a pocket notebook jot down notes in a more freeform way or via a dictaphone or other recording method.

At the end of the day, this information and any other thoughts can be written into a field diary.

As an example you can group notes into:

- What you have participated in.
- What you have observed.
- What you have come to understand or misunderstand as a result, in relation to the stated outcomes you have chose to collect information about.
- How this might complement/ sit with the other research methods and data collection that you are doing – e.g. surveys, interviews, website stats etc…

Your notes could be in the form of quotes, thoughts, conversations, observations etc. and more specifically, could be about such areas as:

Observing

- Noting the range of backgrounds.
- The reaction of people or the way they interact.

Participating

- Asking questions and conversing with participants about how they found the talk / event / meeting, whether they might take action as a result, what their thoughts are.
- Being a participant in listening and immersing yourself to see how it feels.

To Remember

It should be noted with participant observation, there are issues involved in the researcher's (or anyone else who is participating) role and to what degree it is 'participatory' and 'observational'.

In this sense you might be:

- An overt observer / participant – someone who does tell the people being studied that you are watching them / participating for research for measurement and evaluation.
- A covert observer / participant – someone who does not tell the people that they are watching them / participating for research for measurement and evaluation

Participant observation is therefore bound up in networks of power and identity. It is also worth remembering that people may respond differently at different times of the day or because of the way the conference is organised, the immediate surroundings and so on. This is 'normal' for this method and so presents no problem, but should be noted and kept in mind as part of the SIM work.

Chapter 6: Step 2 - Analyse your impact

Questions to consider:

- What is the key information reflecting my impact?
- What are we going to do with the information we have?
- What do I think or feel about the information that is coming to us?
- Which is the most accurate and appropriate way to analyze the data?

After the previous step you should have various ways of collecting information. The next question is, 'what do you actually do with it'?

6.1 What it is and why is it important?

There are unlimited ways of analysing information, ranging from quantitative approaches, which are usually the sort of thing one thinks of through such a title, to qualitative analysis and to the way you process information mentally and emotionally.

What way you choose will largely be determined by the type of data which is available to the project. Data alone does not tell us what to do. How you analyse the data will be important as it will play a significant role in making sure you move from a basic descriptive exercise to one which produces new insight and information as well. For example, you may have so much data you can't see the wood for the trees and over analyse, losing the key messages that you want to communicate. The following guidance can help you to analyse in a way that is most helpful to you.

As a general guide to analysing information, there are some straightforward things you can do with your information. They are:

- Organise, consider or analyse data for themes or patterns
- Reflect on data
- Theorise.

6.2 Organise, consider or analyse data for themes or patterns

You can begin by reviewing the data you've collected for emerging themes and patterns. You will likely be considering the social and beneficiary impact, environmental impact, financial metrics, and other aspects of your project or organisation. Do you have

evaluation questions or a question that you are trying to answer in your work? You may wish to use these questions to group the material into those themes.

Analyse each theme and compare the results to the changes that were expected as identified by any indicators you have. Prepare short summaries of important learning under each theme.

6.3 Reflect on data

Reflect on what the analysis means. You can ask other stakeholders for their interpretations and submit the summaries to the participants for their feedback and verification of the findings.

What does the data and themes you have tell you about your project or organisation?

Questions to investigate typically include:

- What went well? Why?
- What could have been done better?
- Why was this not as good as expected?
- What can you do to make sure this is done better next time?
- Are there any unexpected consequences of our activities (positive and negative)?
- What would have happened anyway? (Deadweight)
- How can we be sure that these changes were caused by our project or programme? (Attribution / contribution)
- Were there any negative effects of our activities or have they been achieved at the expense of others? (Displacement)
- What does this mean for society / economy / environment? E.g. savings to the treasuring, impact on local economy, carbon reduction.

6.4 Theorise and draw conclusions

Finally, after analysing data or information you may start to draw conclusions. How do you do this? It will not be sufficient to draw conclusions based on arguments as, 'in my experience' or 'one of our stakeholders told us' as one's own judgement is fallible and there would be little point in carrying out research and all the effort you may have put in to collect new data. On the other hand, there are few situations where the rigid application of mathematical data leads to a clear and certain conclusion.

To help, the conclusions you draw will depend upon your original hypothesis or what you need to decide, but you can also consider the following questions and points:

- In what ways did this project or organisation contribute to your mission or goal, i.e. help to strengthen community groups or reduce barriers to good health?
- What evidence is there to attribute any of the above changes to the project? What other factors outside the project might have contributed to the changes?
- Were other initiatives started, alternative services proposed or new funding resources acquired as a result of this project?
- What new partnerships developed from this project? What was the nature of the partnerships and what was their contribution?
- Emphasise the positives, but also draw attention to "failures" and lessons learned
- Be sure you can prove (or appear to prove) all you say.

In drawing conclusions, using all the ways of processing information – whether through feeling, someone else (stakeholders or existing research), reasoning or numerical analysis of data – will be more effective in really knowing your social impact.

6.5 Specific types of data

In addition to the above things you can do to analyse and process data or information, there are specific forms of data that you might want to analyse in a more detailed way. Numerical, questionnaire and interviews are some of the most common forms of data that require analysis.

Analysing numerical data

You may find that analysis of numerical data is an important part of your social impact measurement work. Statistics or the analysis of numerical data is of course too huge a subject to cover here, but the following provides some pointers and for civil society organisations this may be all that you require.

The sort of information that might require some numerical analysis is:

- Usage per session
- Service levels over time
- Users, new users, repeat users, churn rate
- Ethnicity, religion and disability status
- Usage of a resource, e.g. a funded social space used X hours per week)
- Other Key Performance Indicators, e.g. number of job interviews a beneficiary goes on

If you think it is appropriate, you can also be creative with numerical analysis and use it to measure other things as well. For example, you could ask people to rate a service numerically (out of 10 for example) or how they felt before using a service and how they felt after receiving the service.

Analysing questionnaire data

To find out what the questionnaires you've undertaken tell you begin by totalling all the responses. Online software such as www.surveymonkey.com is useful because they carry out basic analysis (percentages) as answers are collected.

Even if you are using such a system, before you analyse, you will need to make a quality check on the completed questionnaires. Particular problems which might arise are: the failure of interviewers or the survey respondents (if they are doing it online or via paper themselves) to follow particular instructions or answer questions, a lack of detail in open ended questions and 'patterned' responses. These may not pose a problem to your analysis but do need to be noted and considered before you begin to draw conclusions from the information.

You will likely want to calculate the response rate. This is the number of people who answered the questionnaire divided by the number of people you sent it out to. It is usually expressed in the form of a percentage. So if you sent out an online link to 100 people asking them to answer your questionnaire, and 20 people completed it, then the response rate would be 20%.

The response rate is important is legitimising a questionnaire's results. When a questionnaire gets responses from a large percentage of its target population, the findings are seen as more accurate. Low response rates can damage the credibility of a questionnaire's results because the sample is less likely to represent the overall target population. However, it is not always this simple and a low response rate can be almost as accurate as a higher one. The main thing is that you are aware of the numbers and do what you can to encourage people to answer.

How you analyse the questionnaire data beyond the totals and percentages of each question will depend on what you are trying to find out. You may want to 'filter' or cross check particular questions against each other. For example, is there any difference between how males and females answer your questionnaire? Or is there a correlation between one thing (for example, all those who rated a particular course highly) and another (how they were chosen for that course).

Tip

If you analyse the data you have and find that your favourite hypothesis isn't confirmed or that there seems to be few significant points that emerge, don't be disheartened. This is to be expected in survey research and you may find an alternative hypothesis is more useful or that you just need a different approach to collecting information.

Case Study

Unforeseen feedback that leads to a change

Consider the case of a small charity addressing employability that wished to understand its impact more clearly. In one of their main projects, they ran vocational training and placements for young people from ethnic minority backgrounds. They focused on building and construction trades such as plumbing, carpentry and electrics.

The charity used a variety of mechanisms to ask their beneficiaries and ex-beneficiaries a range of questions including:

- "Was the process supportive and accessible?"
- "Have you been able to work (for yourself or an employer)?"
- "Have you been trying to secure employment?"

As well as using informal (but recorded) interviews, surveys and questionnaires with beneficiaries, the charity also asked wider stakeholder groups about the changes for participants on the vocational training courses and placements.

Most of the feedback was as expected and indicated an increase in the employability and employment rates of participants. However, some unexpected feedback was also collected. This came primarily from the families of the beneficiaries. They reported that as a result of the changes in their children or brothers and sisters, other members of some families had decided to 'follow their lead'. So as a result, some fathers had begun classes at night school, and some mothers had expressed an interest in learning these skills to allow them access to flexible self-employment.

In light of this information the charity recognised the greater demand for their programme and extended it to include a stream for more mature men and women.

Analysing qualitative information

If you have carried out interviews, participant observation or journals you will have qualitative information that may benefit from analysis. How do you do this?

1) Sifting and sorting

To develop ideas, you can start by going through your interview transcripts or participant observation notes a line or sentence at a time, trying to think about what each one means or what was happening and why and jotting down ideas as they emerge by the side of the text. These do not have to be finalised or thought through but literally noted as they come into your mind. Gradually, as they build up, they will spark off ideas and give you a better sense of what it means for your impact or the decision you have to make.

2) Colour coding

The sifting and sorting process can then help you to identify themes that keep emerging (or you may already have these in mind). For example, you might be looking for 'confidence of beneficiaries', or 'impact on staff', perhaps you need to analyse the data for when interviewees have noted thing they will do differently as a result of your work, or you need to look at participant observation information from an event and see if people were inspired.

Once you have listed these categories you can go back to your journals or interview transcripts and literally colour code them. This will give you information and accounts that represent the worldview of the people you interviewed, your stakeholders, so that all the implications of the materials are drawn out.

Colour coding

The sifting and sorting process can then help you to identify themes that keep emerging

Case Study

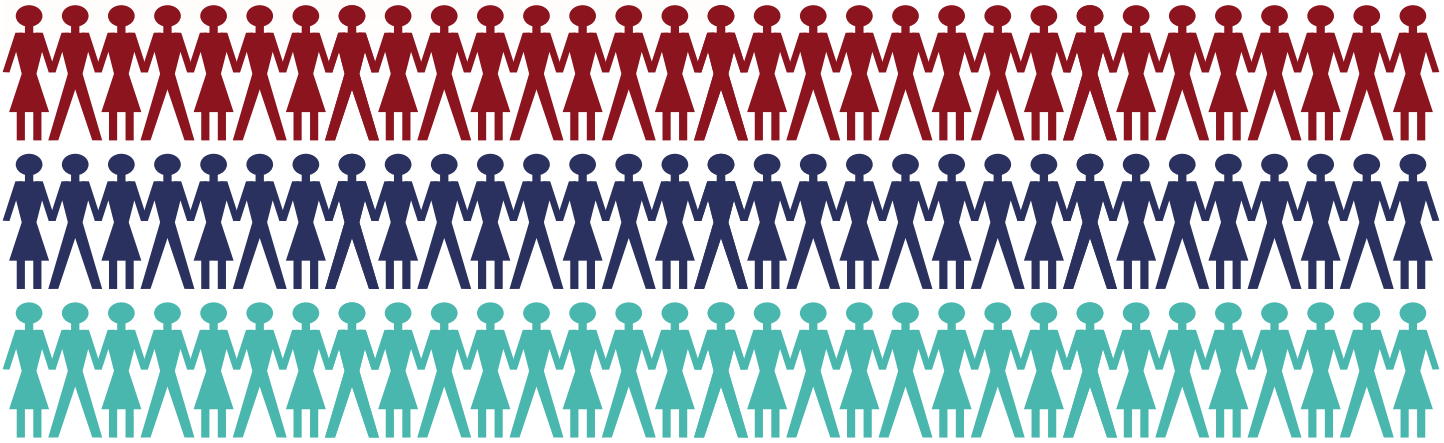
Perceptions of impact

Take the example of a social firm, which is a type of social enterprise that employs a percentage of people who are severely disadvantaged in the job market. Assume that the business of this social firm is to recycle IT equipment for large commercial organisations, which is delivered through employing a number of ex-offenders and people who have experienced homelessness. The people that this social firm employs are central to its social impact and to why the company exists in the first place.

After analysing a client questionnaire and some sample interviews that they had colour coded, and reflecting on their experiences with clients, they found that the clients perceived the social impact of the company differently:

- A neutral factor: For some clients their priority was that the service will be delivered on time and on budget - not how this was be done.
- A positive factor: Some clients were happy to include this fact in their corporate social responsibility reporting and was a reason for choosing the firm.
- A negative factor: A minority of clients seemed to be a little worried that the service might not be well delivered or were concerned about their company security.

They also had information in the form of photos, videos, quotations and art work about what the job means to the employees of the firm and some data from Social Firms UK, the national organisation of social firms, about the financial value of the social firm sector. They brought these together, reflected and talked about them and realised that the combination of photos, quotations and national statistics could really help clients to understand the importance of the people they employ – and the trust the organisation has in them.



Try this…

1) The storyboard can guide you

If you're stuck analysing data, try focusing back on what is the information you should be analysing. You can look at your storyboard and think about how it fits in to the wider story of what you are trying to achieve. Is the information you are gathering confirming your hypothesis laid out in the storyboard? Or is it starting to tell a slightly different story? Is the information helping you to make decisions or telling your something about what stakeholder's really value? Or is it about something that isn't an important part of the story or the value you create? You don't need to have all the 'answers' but using the storyboard in this way will help you to think through what the information is telling you.

2) Use spreadsheets, graphs, bar charts and pie charts

There are many sophisticated ways of analysing data, but unless you have the resources or the skills, it is usually fine to keep it simple. The advantage with using a spreadsheet is that other people can input and access data, rather than just one person. Excel can calculate averages or total data. Displaying data in graphs and tables can help you to spot trends that you may miss in simple numeric form.

Tip

Chart Chooser is a great way of analysing excel data and communicating it through graphs. It allows you to convert numerical data and other information into excel charts easily. **www.juiceanalytics.com/chartchooser/**

3) Benchmarking

If desired, how do you compare yourself to other organisations (i.e. benchmarking)? Essentially, you can do this through two ways. One is to think of 'benchmarking' to mean comparing more broadly. This might be through considering other organisation's impact reports or data that exists online about them and comparing your organisation with them.

You can ask questions like:

- How many people do they affect?
- What measures of success do they use?
- Do they have similar impacts to you or do you provide something different?

The second way to benchmark is much more specific and involves the comparison of data around particular indicators. For more information on this, see Section Four at the back of this handbook. [4]

Take it further…

Be specific about impact

This doesn't relate to analysis only, but is a major stage in which you can get a bit more technical about impact. Most of the time we think of impact as long term changes, but Social Return On Investment (SROI) and other approaches, include a more technical definition that includes concepts such as attribution, deadweight and displacement. Even if you are not conducting an SROI, these concepts can help you to be even clearer about your impact.

1) Attribution

Social enterprises should be careful about attributing wider changes to their activities only, as other factors may have contributed to creating these changes, or perhaps they could have happened anyway. As a starting point, simply asking the question, 'what changes are we wholly responsible for?" and "what would have happened anyway?" can help.

SROI deals with this issue in a detailed and effective way, but if you are not doing SROI, you may want to follow the guidance of the Bill and Melinda Gates Foundation and think of contribution rather than attribution.[5]

2) Displacement

This is another component of impact and is an assessment of how much of the outcome displaced other outcomes. It is not always relevant, but should be considered in a detailed examination of impact.

Examples might be if your organization helped to reduce crime, but in reality it was simply displaced to another area. Or if you help get someone in a particular community into a job, you may have to account for if someone else in that community didn't get the job as a result.

3) Deadweight

Deadweight is what would have happened anyway. To calculate deadweight, reference is made to comparison groups or benchmarks. Information can be gathered by asking stakeholders what other services they access and how helpful they find them, or asking whether they can access a similar service in the area. Deadweight is an estimate not a perfect measure.

Think about baselines and comparison groups. E.g. if you work in a rehabilitation programme for young offenders and collected information to calculate their reoffending rate – you would then compare this to the national average for young offenders. Of if you helped someone to get a job through employability training – you would then ask yourself, what would have happened anyway? To do this, you can ask, what is the average rate in which the long term unemployed get a job in your region?

Chapter 7: Step 3 – Use and communicate your impact

Questions to consider:

- What do you want to achieve with what you communicate?
- What do you want to communicate? (All findings / some findings?)
- To whom and for what purpose?
- What form do they need to know it?

7.1 What is it and why is it important?

By this point, you will have collected information in various ways; felt, thought and analysed that information; drawn conclusions and now you need to communicate it.

Communicating is important to the success of today's social enterprises and charities. Think about all of the successful organisations that you know and admire, and how you remember them. All of them are likely to be excellent at marketing themselves and communicating what impact they have.

Communicating social impact should be a key part of a social enterprise's marketing strategy, it shouldn't be considered peripheral or an add-on, but as a core part of your strategy. This is especially at a time when many organisations claim they deliver social impact, whether they belong to the private, public or charitable sector.

Communicating social impact can help increase your credibility, reputation and attract new customers, funders and even investors. Every organisation will have different things to communicate to their stakeholder groups, and the core messages will be around the value of their social impact.

What do you want to achieve?

Before writing (or visualising) something, ask yourself, 'what is it that I want to achieve with this writing?' Is it to win more customers or to demonstrate your organisation's impact to a funder? You can put this at the top of the page before writing so that it is always there for you to refer back to. The clearer you are about what you want to achieve with the communication, the more likely the audience will understand. The following things can help you to better understand what it is you want to achieve.

7.2 Who do you want to speak to?

Being clear about who plays what role with regards to your business will help you ensure that you are communicating the right message to the right audience. For example, key influencers may be concerned about a specific benefit such as the social impact that you are creating in their communities and this is why they would be recommending your services (e.g. a councillor is interested that your programme is helping reduce youth loitering and anti-social behaviour locally). Your customers will be more interested in the value for money that you provide and whether you have the right quality standards in place to deliver (e.g. your Local Authority is interested in using a quality and competitive provider to minimize risks). And your beneficiaries may not care so much about how much your services cost to the Local Authority, but rather be interested in how well you are solving their problem (e.g. helping them become more confident and find an interesting job).

Internally in your organisation

The exploration of your social impact is a great opportunity to not only recognise achievements of your staff and board, celebrate about success and advocate for it, but also a chance to uncover both the expected and unexpected consequences of your activities, whether they are positive or negative.

Too often organisations tend to record their social impact in a report and pass it on, but by doing so they limit the actual impact of their social impact measurement, as it will be limited to a one off event. Therefore after proving your work, it is time for improving!

Feedback the lessons learned into the organisation's decision and daily operational processes by asking yourself, your team, your volunteers and your board:

- Was this particular activity / process / service effective? Did it create the impact you wanted to have?
- Was there any negative impact or effects of this activity / process / service?
- Are there other things that could be done with greater positive impact and/or fewer negative effects?
- What are the things necessary to create change?
- Are there other activities to conduct alongside the current ones to have the intended impact?

Be specific about the sort of person you are communicating to

For impact reporting and accountability

If stakeholders are kept really clear about why your organisation exists and what it is trying to achieve, then you can measure and report on those things and make your organisation accountable by earning and building trust. Communication and transparency are important elements in building a relationship of mutual trust and understanding. Reporting on the areas where you are succeeding, as well as areas for improvement, and how these will be addressed keeps your stakeholders informed and can allow them to feel part of the process or to directly feed into the process.

By reporting your impact, you will ensure that progress is consistent with the expectations of the stakeholders and the aims of the organisation (and its ability to fulfil those aims). By allowing greater involvement of all stakeholders who are affected by the organisation, you ensure openness and accountability. Not only will you encourage honest feedback but also the generation of new ideas, and a way to identify priorities for the following years.

Case Study

Fifteen, a social enterprise restaurant that works with disadvantaged young people, published a social report that communicated many of their successes. It also reported where they had failed in delivering their desired outcomes for their beneficiaries. This approach meant they were accountable and better able to improve, and they gained praise for their honesty.

www.fifteen.net

For funders, commissioners and other clients

With your clients / commissioners, when communicating your impact, you might get a strong competitive advantage: in addition to competing with other companies based on price and quality, you can let the people know that you have something more to offer. If you can identify corporate or government aims that your social enterprise meets, you could have a 'leg up' in making the case for purchasing from your organisation.

However be aware that communicating your social impact to your existing and prospective clients can be quite tricky, because despite how passionate you are about the social and environmental impact that you create, it is the hard truth that not every client may care as much as you do.

Tip

There are many organisations out there who communicate what they do, the activities and the ouputs of their work, but less who communicate what actually changes for the people they work with and for.

7.3 Be specific about the sort of person you are communicating to

With your understanding of the appropriate stakeholder groups you wish to communicate with, you should be in a position to think like them (or profile their behaviours).

- Where do they get their information?
- Who influences their buying decisions?
- What media do they follow?
- Do they congregate anywhere, either physically or virtually?
- Who else is speaking with them, and are you able to use that opportunity?
- What motivates them? Is it cost, quality of service, or added social value and impact that they use to differentiate between their choices?

Think how you are best able to communicate the quality and social impact of what you do to those groups.

7.4 How are you going to speak to them?

Having considered who you want to speak to and the sort of person they are, there are many ways you can speak to them. To start with, you can use your internal tools: on your own brochures, website, blog, Twitter, newsletter, direct mail, case studies or success stories, annual reports, one-to-one meetings,

tender response documents, seminars and events. Don't forget you probably have existing reporting obligations to funders too – and these are also marketing opportunities for future work or funding.

In addition to internal tools, you can also use the free media: share your stories on articles, ask the local print media to run a story on your organisation. This is one way of encouraging advocacy from your stakeholders: encouraging employees, partners, beneficiaries, clients and others to talk about your organisation and the work it does.

Finally, make use of your social impact communication by putting yourself for awards in the sector, which will provide you with great reputation and credibility. Third party endorsements, such as awards, or testimonials or recommendations from opinion leaders, customers or beneficiaries can be compelling.

Case Study

Haringey Advisory Group on Alcohol (HAGA)

Haga are a long established entrepreneurial charity dealing with alcohol and substance abuse issues in north London. They have found over time that a "mainstream" approach to report writing and annual reports leads to unread and undistributed documents.

By looking at their users, their families and the community in which Haga operates they developed an annual report in the style of a lifestyle magazine like Woman's Own or Hello! This is memorable and accessible to a much wider range of stakeholders than standard annual reports. Furthermore, this increased distribution acts as an effective awareness-raising tool. Finally these reports tend to be kept and are talking points months or years after they are released.

How many other organisations can make the same claim?

Source: http://www.haga.co.uk/resources/AR2008.pdf

Try this…

1) The storyboard and the bigger picture can guide you

Your storyboard will also give you a 'touchstone' for communicating your impact. Is there anything major that you have left out of what you are communicating from your storyboard? For example, do you include the sorts of things found in box five – the long term changes? Are you being clear about the needs you are addressing (box one) when communicating what you do? Is there information about the barriers, learning and challenges you face (box eight) in your impact communications too?

2) Your differentiator or unique selling proposition (USP): how do you stand out?

This involves developing an understanding of where your enterprise is positioned in the market: who else is out there? And how do you stand out amongst them?

To find out what your differentiator or USP is, try to answer the following questions:

- What is the best of all the benefits you provide?
- What is the most convincing reason you could give a potential customer for buying from you or commissioning your services?
- What do people find most attractive and interesting about your impact?

3) Create a picture of who you are communicating to

If you are specific about whom you are communicating to it will help you to tell them what they need to know or what will create the action you want as a result. One way to do this is to go through some magazines or printed website pages and cut out pictures that represent your target audience. Stick these pictures on to your page. You can add writing to it as well, so that by the end you should have a collage on a page or poster with various pictures and writing that reflects the person or people you are talking to. You can even give them a name. Then, when writing the proposal, report or website page – have this by your desk or on your wall to remind you of some of the questions above. What language do they understand? What things are they interested in? What would inspire or inform them to support your organisation or give you a contract? You may find it a lot easier to answer these questions in your writing with your collage to help.

Take if further…

1) Get serious and create a rigorous impact report

Sometimes you need to tell a story, or provide testimony that will connect people to what you are doing. At other times (for example for large contracts for services) you will need to be much more rigorous. The following checklist provides a

list of things that, if included, will provide the basis of an extremely thorough and evidenced report.

Have you included?

- Vision / mission
- Problem or need and the context
- Overview and activities
- Outputs
- Outcomes / impact
- Performance: summing up achievements and an overall evaluation.

For more information on the sorts of things the think tank New Philanthropy Capital looks for in annual and social impact reports, see their report, Talking About Results.[6]

2) Consider going one step forward by implementing quality standards

Quality standards are an opportunity for organisations to prove their credibility and accountability as well as their ability to improve and adjust their operations. If your organisation faces strong competition from other organisations offering similar services or products, working with quality standards is one way in which your organisation can differentiate itself. Please see the box below for further details on quality standards.

A few examples of quality standards

Co-operative, Environmental and Social Performance Indicators (CESPIs)

www.cooperatives-uk.coop/Home/miniwebs/miniwebsA-z/cespis

CESPIs were developed by Co-operatives UK to help co-operatives determine how they are living their co-operative principles and delivering on their social purpose.

Development Trusts Association 'Fit for Purpose'

http://www.dta.org.uk/activities/programmes/fitforpurpose.htm

Fit for purpose is a diagnostic tool to help a new or developing community enterprise in assessing its strengths and areas for improvement against key criteria.

Investors in People

www.investorsinpeople.co.uk

Investors in People is designed to advance an organisation's performance through its employees, or the management and development of the organisation's people.

PQASSO (Practical Quality Assurance System for Small Organisations)

http://www.ces-vol.org.uk/index.cfm?pg=42

PQASSO is a quality system that helps management to run an organisation effectively and efficiently. It asks organisations to take a systematic look at what they do and to decide exactly where improvements are needed.

Star Social Firm

http://www.starsocialfirms.co.uk

Social Firms are businesses whose social mission is the employment of severely disadvantaged people. The Star Social Firm is awarded to Social Firms that have proved the quality of their business and the employment they provide for severely disadvantaged people.

Social Enterprise Mark

http://www.socialenterprisemark.org.uk

The Mark is awarded to businesses who meet specific criteria that demonstrate they are working primarily for social and/or environmental goals, and that 50% of their profits are reinvested towards those goals.

SEE what you're buying into.com

http://www.seewhatyouarebuyinginto.com

SEE is a labelling scheme that empowers people in making better consumption choices. SEE stands for Social, Environmental, and Ethical.

3) Help all your staff to sing from the same song sheet

Whether you have one person who is leading on social impact measurement or several members or the whole organisation is involved, it can also help to make sure that your staff are able to communicate your impact too. Do they know what impact the organisation is having? Do they have a few key lines or impact or some impressive evidence they can bring to a conversation at a conference or an email to an interested contractor? Following this handbook's three steps you should have some 'key messages' they can use or have come up with themselves. Do they know what sort of people you need to influence or talk to at this moment in your organisation? If your staff have a good idea as to the people who could make a difference or who need to know about your impact, and they can speak or write to them in an effective way – then your organisation will see the difference.

Chapter 8: The 3 steps case studies - what would you do?

Below are two real case study examples of how the three steps can be implemented in practice. You can read through the context, decide what you would do and then see what the organisation did.

Exercise one: Measuring the impact of volunteering

A charity works with young people, organisations and community groups to create and develop volunteering opportunities that reflect the passions, aspirations and career goals of 16-25 year olds. At a crucial point in their funding cycle, they wanted to better evaluate what their social impact has been. They also wanted to communicate their social impact in an accessible and colourful way, but with substance and to a wide audience. To this end, they want to involve a diverse a range of stakeholders as possible and reflect the diverse individuals, organisations and partners they work with.

They have a key question to answer, "What difference has our youth volunteering project made to young people?"

They have existing data around the demographics of the people they work with, and output and outcome data collected for funders. They have less data around longer term changes and around the personal development of the volunteers.

What would you do?

What they did

Whilst they already had data and a good understanding of their impact and where they could improve, they decided to begin by doing a storyboard to pin down what were the key social impact messages from their work and what they needed to measure more. At this stage, they only included the staff team in the storyboard, but knew that in the future they can do this with volunteers or partner organisations.

The storyboard gave them several key lines to follow up and measure, including:

- The perceptions of volunteers change before and after volunteering
- Volunteering leads to skills and contacts for employability
- Organisations that have volunteers are strengthened by them

They decided to do this through two questionnaires first. They sent one survey to volunteers and one to organisations where they placed volunteers. The surveys were online and incentivised to encourage responses.

They asked a before and after question about perceptions:

Thinking back to before [and after] you volunteered, which of the following things did you use to associate with volunteering? Tick all that apply.

- Fun
- Worthy
- Boring
- Good for CVs
- Not paid
- Internships
- Making friends
- Not important
- Older people
- Saving people
- Helping the local community
- Learning new things
- Helping people in other countries
- Good use of time
- Other (please specify)

They also asked volunteers questions such as:

Through your volunteering, how many new people have you met that you've stayed in touch with? (E.g. someone you use as a CV referee, a Facebook friend or someone you meet with).

0, 1-2, 3-4, 5-6, 7-8, 8-9, 10+

Has volunteering contributed to helping you get a job or different employment?

Yes, No

If yes, how has it helped you to get a job?

- I got accreditation / a certificate for my volunteering
- It improved my CV
- It changed my ideas about what I could do
- I met someone who helped me with work
- Other (please specify)

The online survey analysed the data for them and they discussed the findings as a team.

They then followed this up with case study interviews to further understand the longer term impact of their work, for both volunteers and partner organisations. In analysing it their findings included:

- That volunteers perceptions do change after volunteering but in ways they didn't expect
- That 48% of the people they surveyed said that volunteering changed their ideas about what they could do
- That 98% of respondents reported that as a volunteer they did something they had never done before

The organisation thought the findings were powerful and knew that they needed a wide audience for the report – from potential funders to the young people they work with so they brought this together in an accessible, colourful and engaging report, which was produced and designed. This was well received by stakeholders because it had substantial information about their impact – including longer term changes as well as numbers and narrative, the lessons they had learnt and problems they encountered, but all in an accessible, colourful and engaging way.

Exercise two: Planning for impact at a community centre

A suburban residents' association had been successfully running a multi-use community hall for over fifteen years. The association was set up in an area of the town with a high proportion of council and social sector housing.

The association was approached by the local authority with an offer to manage and run a second community hall on the other side of the town. This hall had been run for several years with varying success. Some projects and management teams had been successful in running the hall, but in recent times the building was under-utilised and had fallen into a state of disrepair, and the management committee was disengaged.

The association had historically used their original hall as a base for IAG (Information, Advice and Guidance) and worked with CAB, legal firms, the local council and PCT on a number of programmes. They also ran affordable childcare, old people and young people's activities such as Tai Chi-Chuan, five a side football and low-level ICT and job readiness clubs and employability programmes.

One of the options for the management of the new hall included a community café. However, it was unclear whether running the new café would affect the social impact they were creating in their existing hall.

There was also the question of whether the café could have a broader social impact than just the day to day function of a café. The residents association decided they would at least consider the opportunity that had been offered to them. There was additional space in the new facility over and above that of the kitchen, reception and café space. This included a large hall and two ancillary rooms off it, and a suite of three rooms.

What would you do?

What they did

The resident's association firstly considered the opportunity within the context of their strategic objectives. They asked themselves (the senior management team, trustees and membership), "is this something that furthers our vision and social impact?"

Once they had decided that it did fit broadly within their vision and allowed them to develop activities and reach to fulfil those objectives, they began to think about collecting information that would tell them more about the potential social impact. The mechanisms they used were varied and complementary in order to reach their stakeholders.

In addition to internal discussion with the senior management team, staff, trustees and general membership there was wider stakeholder engagement with a range of groups and specifically the young and older peoples groups.

This was done through a variety of methods including:

- Informal (but recorded) discussions and interviews
- A paper questionnaire with stamped addressed envelope provided
- A storyboard with the senior management team

They also used Google maps to identify the location of nearby cafes and they checked their assumptions as to whether these were direct, or indirect competitors by walking to all the cafes within one mile in every direction.

They did some simple analysis on the questionnaire, working out the common areas of agreement but also noting objections.

They also analysed through asking themselves questions at all times whilst going through the data. These were:

- Does this add to the social impact of the residents association?
- Does this allow us to deliver more services to our membership and the community?
- Does this increase social cohesion and decrease inequalities for our community?

They communicated it through a formal presentation to officers involved with asset transfer in the local authority and by a flyer to residents and general membership. They were successful in communicating the additional social impact they were able to deliver and they were successful in getting the contract to manage the hall and to this day run a successful community café.

Section 4
Commissioning and procurement

Chapter 9: Choosing indicators

Now that you have done the three steps and looked at some case study exercises, we can explore how you can use indicators, how this fits into winning work in West Sussex and some other tools and approaches you may wish to investigate and use.

Some of you will be more focused on using SIM for purposes of commissioning and procurement. There will always be place for grants in the social economy, but providing goods and services through the commissioning process is becoming more commonplace.

If your organisation offers such services and you intend to deliver them for West Sussex County Council, the following two things can be useful for winning business:

1) An impact map

2) The indicators bank

9.1 Setting indicators using impact mapping

If you are comfortable with SIM you can go straight ahead and use impact mapping to set indicators for your organisation or project. If you are new to this, you can complete a storyboard in Section Two and use that material to form the basis of your impact map.

If you are using your storyboard, look at what you have written in each box, and think about each comment in terms of whether you would describe it as an Input, an Activity, an Output, an Outcome or an Impact. If you are going straight to impact mapping, use the template below to begin the process.

The working definitions in the table below may help you decide which is which.

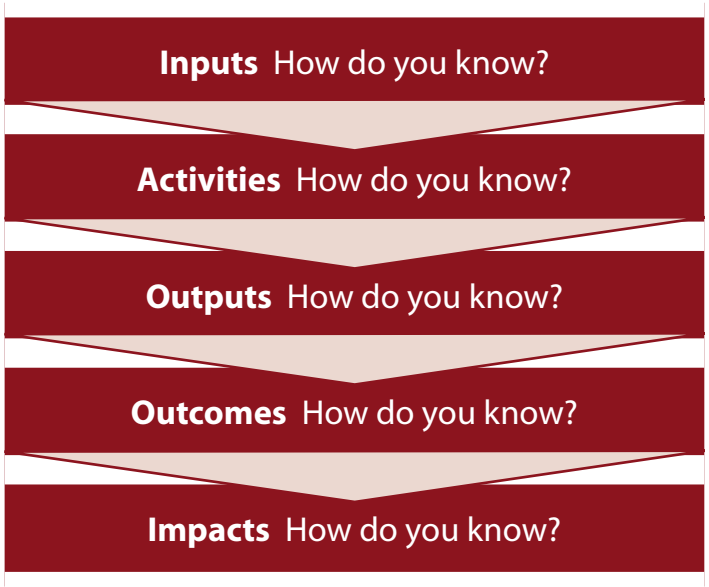
Table: Elements of the impact map

Inputs	Activities	Outputs	Outcomes	Impacts
The **resources** that you need to manage the project. For example, time, money, staff, other assets (such as a building), a clear vision and shared direction etc.	The **things that you** do to affect some sort of change in people, the community, or the environment. For example, providing a service, a programme, or goods to people.	The **direct results and beneficiaries**. Usually outputs show that certain people receive something, learn something, or take part in something as a result of what you do or how you do it. For example, easily countable things, like the number of people involved, or the number of hours of training delivered etc.	**Longer-term change.** Describe why that output is important, in terms of the implications for, and the effect it has on, a local area or a group of people. This is the theory that you will be testing – the link between what you do and the things you care passionately about.	When thinking about your vision, impacts are the **big-picture change** you are trying to create or the changes in the wider world that the work you are doing is contributing to. For example, this could be in terms of your vision for change in people's lives, a community, the environment or the local economy. Otherwise a more precise definition of impacts is **"the outcomes less what would have happened anyway".** For example, if you got ten people a job, how many would have got one anyway?

Clarify which is which by listing each of the comments under one of the five headings. (We recommend that you draw up a blank version of the table onto a flipchart sheet and fill it in, column by column.)

The impacts section can be used in two ways. If you are using the impact map to look forward and create a vision, use the impact column for thinking about your big-picture vision. Otherwise, use it to account more precisely for what you have achieved by taking away from your impacts what would have happened anyway.

Diagram: Ways of knowing – identifying indicators



As a first step to choosing and developing indicators (literally: ways of knowing that something has happened or changed) ask yourselves how you will know that a particular Input has been delivered, how you will know that an activity has successfully produced a particular Output, and how you will know that that Output has successfully brought about an Outcome and an Impact. Do this for each of the items you have listed in each of the columns.

On a third sheet of flipchart paper, make a long list of these 'ways of knowing'. This will be the basis for a master list of the things you need to measure in order to be able to tell your story.

An example

Here's a possible 'story'. For a training session (Activity) to have been a success it needs to have been delivered (Output) with a certain number of people attending (Output) who gain a new skill (Output). They then may successfully apply for a job using their new skill (Outcome), or they may find that they are enjoying their current job more (Outcome).

This means that they stay in a particular job for longer (Outcome), and are able to take on more roles and responsibilities as their confidence grows (Outcome). In the long run if this happens for enough people in a neighbourhood there will be a higher proportion of people in employment able to achieve a better quality of life for themselves and their families (Impact).

So if we were to make a rough list of the ways we will know that the training has been a success, it might include (these indicators):

- Training session delivered
- Participants complete the training and gain a qualification
- Participants successfully apply for a job
- Participants happier in their current job
- Participants still enjoying that job in 12 months' time
- Participants talking on new roles and responsibilities in their jobs
- Participants saying that their life is better
- Participants' families saying that they have a better life.

Some will be easy to count; others will be extremely difficult to measure or collect information on. At this stage, when compiling this long list, don't feel constrained by what you think you can measure. For many of them, you will find that you are collecting information on them already, but realistically you can't cover everything. When finalising your indicators you'll need to decide what you can feasibly do with the time and resources you have available.

Tip

Setting indicators

You can use your own indicators, or use indicators already in existence. See for example, **www.sroiproject.org.uk**

You can also use and build upon the indicators that West Sussex County Council developed during the creation of this handbook, which are detailed in Chapter 7b.

9.2 Commissioning and procurement: West Sussex County Council

This section acts to draw together a range of indicators developed with service providers and West Sussex County Council, as a body of knowledge to support you in developing a set of indicators for your project or organisation.

How these indicators were developed

For West Sussex County Council, measurement is a crucial part of delivering services and ensuring that it is best serving citizens. The Council had been looking at some of the services they provide for the future and asking, "For prevention, well-being and promoting independence, what are the services that can have an impact and what are the key measures of success?"

light of this, the Council undertook its own SIM process using the storyboard method detailed in this handbook, with adult social care services. Over 40 delegates from the adult social care sector attended workshops over the course of three months. Over that time the process has allowed WSCC to identify needs, outcomes, impact (see Diagram below) and example indicators. Those formed the basis of identifying the most important things to measure for the Council and the indicators listed below.

Who can use these measures?

The indicators below were developed with adult care services; they relate to older people services but can be used by any organisation in any field in which these may be relevant. For example those working in mental health and learning difficulties or those who are interested in improving social interaction in a community or individual's well being can use these indicators. They may require some tweaking in terms of language but they will still be helpful if relevant to your work.

Tip

These measures are not a prescriptive list, but will be understood, recognised and respected by commissioners if you use them. Commissioners will add and take away from this list over time, but the list will give you a very good idea as to the important common themes that can form the foundation of your indicators and measurement.

Diagram: Outcomes to impact

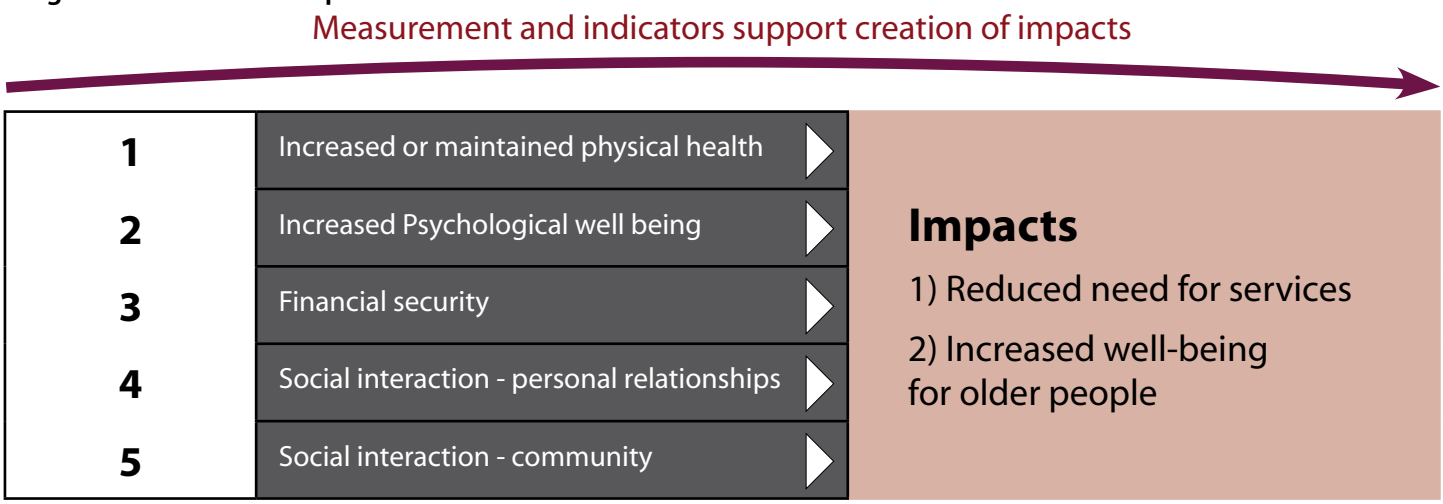


Table: Outcomes and indicators

Outcomes	Sample Indicators	Notes and how to measure
Increased or maintained physical health	1) Extent to which older person receives the support they need to live independently at home 2) Older person's rating of their physical health 3) Percentage / older person undertaking 5 x 30 mins of moderate physical activity per week 4) Older person is better able to mange disability / long term conditions / general physical health 5) Improvement of condition that was present upon referral or entry to the organisation	Support is a thread throughout the outcomes May include number of falls or accidents as one way of measuring impact – but in combination with other ways. Improvement in how frequently the person has experienced the following problems in the past month: - Poor appetite - Chest pains - Tiredness/fatigue - Nausea - Bone/joint pains - Numbness
Increased psychological well-being	1) Extent to which older person feels positive about themselves 2) Older person feels they can cope with challenges in life 3) Older person's rating of their quality of life 4) Extent to which older person feel that what they do in their life is valuable and worthwhile 5) Change in how frequently the person has experienced the following in the past week/month: - Depression - Anxiety - Stress	Psychological well-being as including mental health, coping / resilience, emotional well-being, meaning, purpose and quality of life.

Outcomes	Sample Indicators	Notes and how to measure
Financial security	1) Ability of older person to effectively manage money 2) Older person feels able to spend money on the things that matter to them 3) Number of people older person could ask for help if in financial difficulty 4) Older person has a lower proportion of income spent on essential items than before 5) Increase access to appropriate financial services (e.g. savings, cash machines, low-interest loans) or benefits	A need here to balance person's relationship with money, but not at the exclusion of wider financial and economic processes (including income, access and basic needs). Acknowledgement that income on essential items is primarily out of Council control but need to allow for full picture.
Social interaction – personal relationships	1) Extent / numbers of times older people meet socially with friends, relatives or colleagues per week or month. 2) Extent to which older people get a chance to learn new things from other people 3) Extent to which older people think there are people in their life who really care about them 4) Older person is less isolated 5) Older person has at least three sources of support for a scenario (e.g. needing a lift; needing help when ill in bed; needing to borrow money)	Includes ways in which relationships lead to improved well being, support and reduced need for services. Extent can be read in different ways. Can be measured by numbers, percentages, improvement, quality, rating or other way of reporting.
Social interaction – community	1) Older person feels that people in their area treat them with respect and consideration 2) Older person is better able to help other people in their local area 3) Older person likes the accommodation they live in 4) Older person enjoys the area they live in 5) Older person feels they can influence decisions that happen in their local area	Relates to ensuring that value is not just related to the service level itself but wider value across the council area. Data collected for some indicators could include volunteering or skills information. Indicators relate to belonging, social inclusion and the ability for older people to be active citizens (not just recipients of services or care).

How to use these indicators

These indicators should help you to find out, 'how do we know' that something is happening (or not)? As such, you will need to do something with them.

To do this, return to the three steps in this handbook and:

1) collect or gather information about them

2) analyse it

3) communicate and report on them.

However, there are two particularly useful things you can do with each indicator that you use.

1) For each indicator:

Information will need to be collected to find out, 'how do we know' this is happening or not? In order to get an accurate picture, that can be done through the perspectives of different stakeholders.

When collecting data you can:

- ask older person / people
- ask family
- ask friends
- ask carers, GPs, colleagues or others who know them well.

The indicators can also be used in different ways depending upon the decision that needs to be made or what the organisation wants to report:

2) For each indicator:

- Measure as individual and/or as group
- Measure baseline or where they are now and measure improvement
- Measure as part of demographic considerations – comparison of groups, ages, geography etc…
- Measure several indicators at once – or those which you think tell the full story about your impact. Indicators should be complementary and can be used with others.

Section 5 Extras

Chapter 10: Choosing another method

10.1 Some other tools

There are many tools out there that exist to help organisations measure and improve their social impact. The storyboard and three steps can be used alone, but can also be used with all the tools outlined below. For example, the storyboard and impact mapping forms the basis of SROI and can easily be integrated into Social Accounting and Audit. Furthermore, each of these tools will require you to do the three steps in some way. With all of them you will need to source information, analyse and communicate it. When you come to using one of the methods below, reading and using the three steps in this handbook should make it easier to do what is required for that method.

This is not an exhaustive list, but below are summaries of some of the most widely used methods so you can investigate and find out more if you think they could be of use.[7]

Case Study

The Aldingbourne Trust is committed to unlocking potential in people with learning difficulties. They provide opportunities for people aged from 18 years to develop a choice of skills leading to greater independence and, wherever possible, useful employment in the local community. They provide a range of day, residential, training and support opportunities.

They chose Social Accounting and Audit as a way to measure and report on their impact. This involved them collecting information from stakeholders through a variety of ways, analysing it to understand what it meant and then communicating it through a social impact report. The report showed their achievements in supporting people with learning difficulties to reach their potential and the value for money the Trust provides.

Whatever social impact measurement tool you use, the three steps will integrate with that tool and help you to carry out the process more effectively. www.aldingbournetrust.co.uk

Method	What is it?	What does it do?	Useful for…	More information
Outcomes Stars	The Outcomes Star™ measures progress for service users receiving support in order to maximise independence or achieve other goals. There are different versions of the Star for different sectors (e.g. homelessness, substance misuse, older people, mental health and young people).	All versions consist of a number of scales and a Star chart onto which the service user's score on each scale is plotted. Using the mental health tool as an example, outcome areas include trust, hope, identity and self-esteem. The process is repeated at regular intervals, depending on the project's requirements.	Anyone providing support for those sectors with an Outcome Star. Particularly useful for mentoring and 1-1 support. Low resources required	www.outcomesstar.org.uk
New Philanthropy Capital Wellbeing Questionnaire	NPC has developed a multi-dimensional questionnaire for charities to measure improvements in 11 to 16 year old children's subjective well-being.	Use of the questionnaire involves observing children's levels of wellbeing and how it changes over time. The tool allows for exploration of how intervention can affect different aspects of a child's wellbeing.	It has been developed for anyone working for children's well being in the third sector to use for small cost.	www.philanthropycapital.org/publications/improving_the_sector/well-being/
Social Accounting and Audit	Social accounting is the process of collecting information about the activities an organisation carries out which affect its stakeholders. Social accounting has been developed with an external, quality-assured audit process so that an organisation's claims can be credible (proved) and used to demonstrate organisational development (improvement).	It can help an organisation to investigate its performance against social, environmental and economic objectives, and ensure that it is working in accordance with its values.	Organisations of all sizes and types can undertake Social Accounting but it is particularly useful for a comprehensive understanding of impacts.	www.lm3online.org www.nef-consulting.co.uk/en/page_149.html
Social Return on Investment (SROI)	SROI is an approach to understanding and managing the impacts of a project, organisation or policy. It is based on stakeholders and puts financial value on the important impacts identified by stakeholders that do not have market values.	SROI seeks to include the values of people that are often excluded from markets in the same terms as used in markets, that is money, in order to give people a voice in resource allocation decisions. SROI is a framework to structure thinking and understanding. It's a story not a number. The story should show how you understand the value created, manage it and can prove it.	Those who want to monetise their impact and seek a thorough understanding of their theory of change.	www.thesroinetwork.org

10.2 You've done the three steps…what now?

By now you should have assimilated quite a bit of information about social impact, but there is only a certain amount you can learn through reading. There's no doubt that this work can be challenging sometimes and we can wonder what the point is. But if you start and develop now using the steps you have learnt in this handbook, you'll find the right way to help you prove all the good work you do, and improve it for those you care about, and the wider world.

Keep the conversations going…

Let us know how you get on! Have you found a perfect indicator? Or used the three steps to grow your organisation?

Contact the West Sussex Social Enterprise Network:
info@WSSEN.org.uk

Or the social impact team at Red Ochre:
www.redochre.org.uk

Footnotes

[1] Scaling up for the Big Society NPC perspectives: Scaling up for the Big Society
Brookes M, Lumley T, and Paterson E, May 2010

[2] See www.westsussex.gov.uk

[3] http://www.ncvo-vol.org.uk/news/strategy-impact/are-you-thinking-needs

[4] For more information on benchmarking see the Performance Hub publication, Benchmarking Made Simple, www.ces-vol.org.uk/index.cfm?format=238

[5] For more information see the report, 'A Guide to Actionable Measurement': http://www.gatesfoundation.org/learning/Documents/guide-to-actionable-measurement.pdf

[6] http://www.philanthropycapital.org/publications/improving_the_sector/improving_charities/talking_about_results.aspx

[7] For further information on these and other methods and approaches, visit: www.proveandimprove.org/new/tools/index.php

Notes

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