

# Understanding and quantifying your social impact

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# Exercise: Assess your metrics

How do you know whether your current metrics (performance, financial, environmental, social) are the right ones for your NGO?

Consider your metrics and rate them as follows:

- 1 = No value in this goal
- 2 = Some help on this goal
- 3 = Quite helpful on this goal
- 4 = Extremely valuable on this goal

How well do your performance metrics:

- ☐ Translate your strategy into concrete action?
- ☐ Align departments behind common goals
- ☐ Fully reflect what stakeholders care about?
- ☐ Provide leverage (scale) to create change?
- ☐ Balance leading and lagging indicators?
- ☐ Balance strategic and operational indicators?
- ☐ Enhance your ability to compete in the future?
- ☐ Drive improvements?
- ☐ Include internal and external benchmarks?

Total your scores

Score	Narrative
1-17	Not adequate, although there may be possible easy and effective changes
18-27	Good, but room for improvement
27-36	Among the best social performance management systems in your area of interest

Meta questions

- Do you review your metrics on a regular basis?
- Do you do this independent of, or with, your strategic planning process?
- Why do you use performance and social performance measures?

# Agenda

- What is social impact why is it important?
- What words are used to discuss SI?
- How is SI measured?
- Problems with tools and processes
- A real world approach that works
- Introduction to alternative methods, and resources
- OK. What next?



# Follow-up from this session

- Notes of this session
- Handouts and exercise templates
- A copy of the Social Impact Measurement (SIM) Guide, written by Red Ochre for WSCC, TOMS etc.



## **The SIM Handbook**

West Sussex County Council's  
guide to social impact measurement



# Exercise: Introductions

- What is your experience of SI?
- Generic problems with measurement and reporting
- Specific problems you have experienced with measurement and reporting
- 3H (extension exercise)
  - Heart. Story, case study or emotional hook
  - Head. Some statistics to back up the need. Basics of what you do. Something concrete to back up your impact
  - Hands. Close – ask for something – a contract, a meeting, a card, an opportunity to call for support or action

# What is social impact?

- Impact: the positive change an organisation makes (or *plans to make*) to people, society, economy or environment
- Evaluation / Measurement: Anything that helps you to better understand the impact your organisation is having
- Management: Using what you've learned to make your work more efficient or more effective





# Why is SIM important?

## Quality

Volunteers  
Media  
Efficiency  
Effectiveness  
Proof Value Results  
Impact  
Awareness

dsc

directory of social change

# Because ...

- Internal
  - To support better decision making
  - To support investment decisions – using limited resources better
  - Understand and communicate the complexity of the transformation of services and ‘change processes’
- External
  - Manage your “value” chain – contracts and performance management
  - Quantify, control and communicate the benefits your intervention brings to your clients
  - To prove your case to funders, purchasers and other stakeholders



# Exercise: Outputs & outcomes

Goal	2015-16 result
Provide a warm welcome, respite and personalised support services to rough sleepers, homeless people and people at risk of becoming homeless	27,710 visits to the Resource Centre to receive support over the course of the year
Support clients to move into appropriate and safe accommodation	234 clients were supported to find accommodation
Provide support to ensure clients maintain their tenancies and do not return to homelessness	162 clients received ongoing tenancy maintenance support
Provide essential, high-quality mental health and substance abuse support	353 clients with mental health needs were supported 182 clients with substance misuse needs were supported
Ensure that vulnerable homeless people leaving hospital do not return to the streets	127 people were helped to find accommodation before they were discharged from hospital

# Caveat: Social Impact vs. Social Value

- Social impact ≠ Social Value (necessarily)
- Public Service (Social Value) Act 2012
  - All public bodies in England and Wales are required to *consider* how the services they commission and procure might improve the economic, social and environmental well-being of the area
- Social value = “If £1 is spent on the delivery of services, can that same £1 be used, to also produce a wider benefit to the community?”
  - In this context social value can be (mis)interpreted as *added financial value*

# Caveat: Practical constraints



Professional  
background



Training  
of analyst



Financial  
Resources

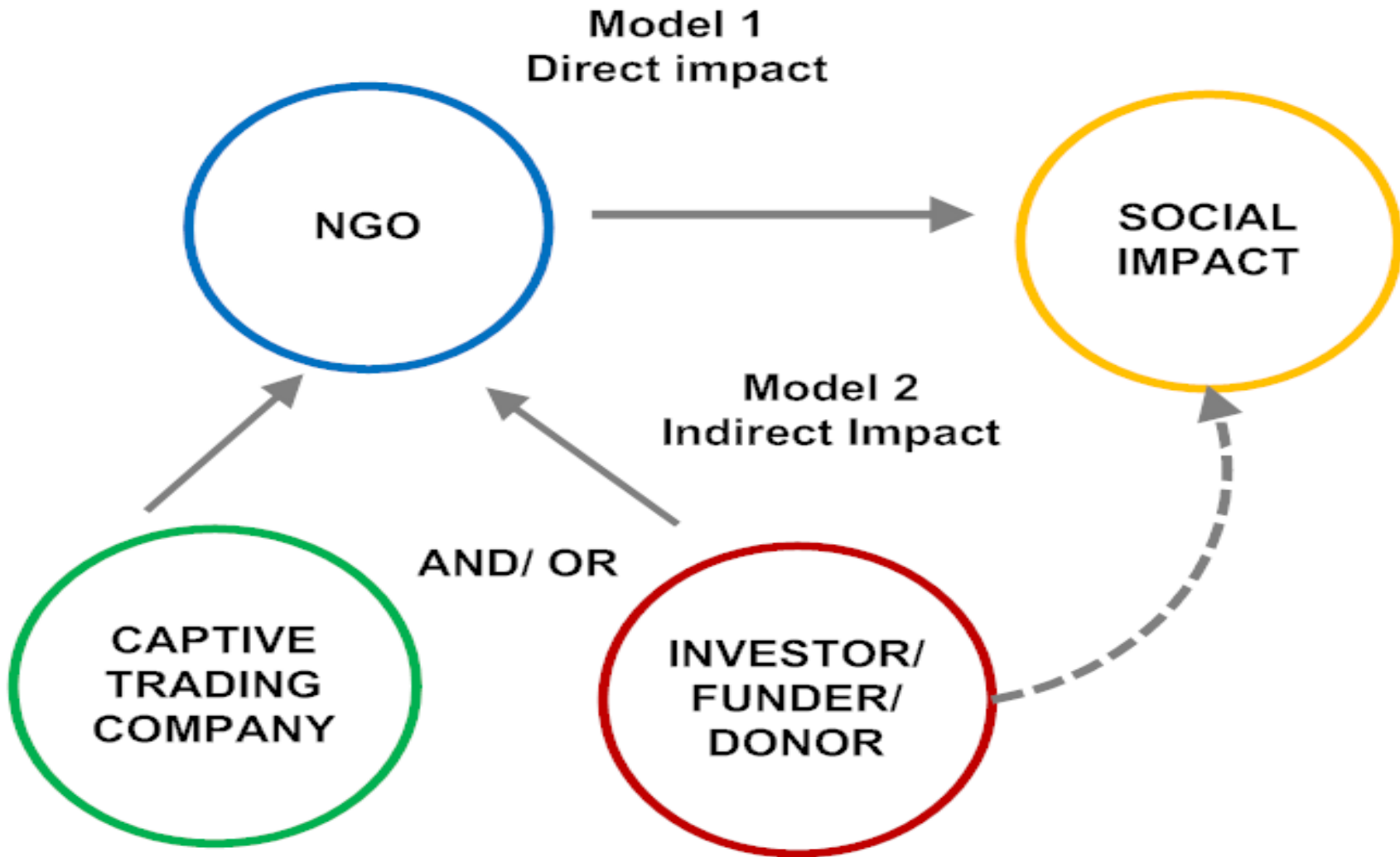


Age of the  
program

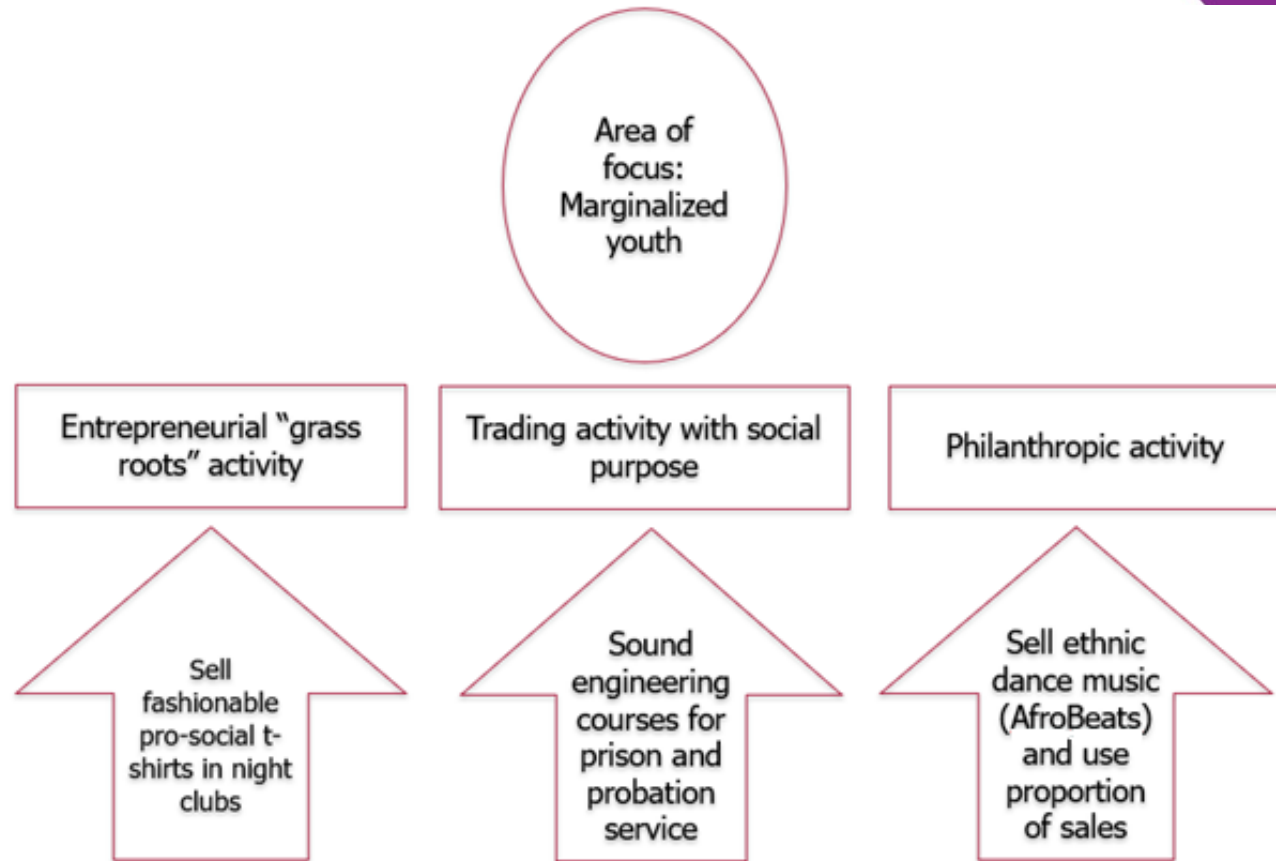


Complexity of the  
program's theory of  
change

# SIM 101: Impact models



# Case Study: We Make a Change





# Formal & informal approaches

- Robust and large data studies (quantitative) give your theory of change credibility
- Stories about people (qualitative) touch the humanity of your funders, the media and your stakeholders
  - Lives touched, a type of personalised case study of your impact on a person
  - Story telling, *but “anecdote” is not the plural of datum!*
  - Look back move forward



# E.g. Look back move forward

What went  
well?  
Item #1

What went  
well?  
Item #2

What will you  
do next time?

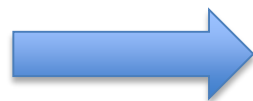
What will you  
do next time?

What could  
have been  
done better?

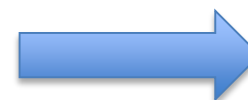
What will you  
do next time?

# Hypotheses and Theory of Change

Problem

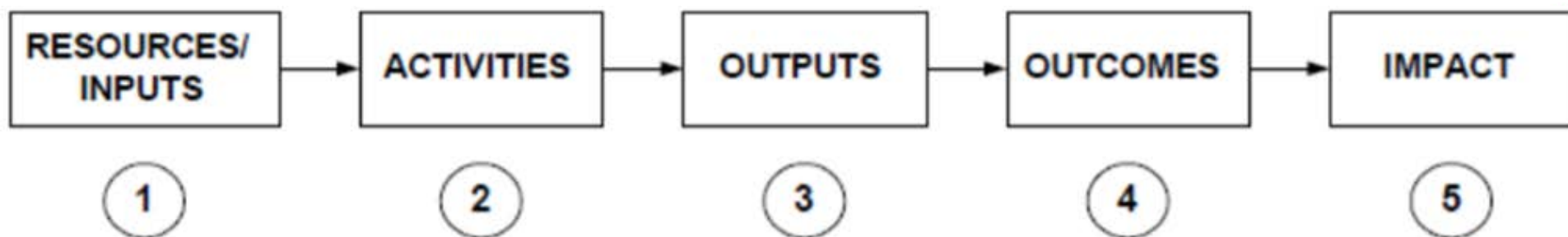
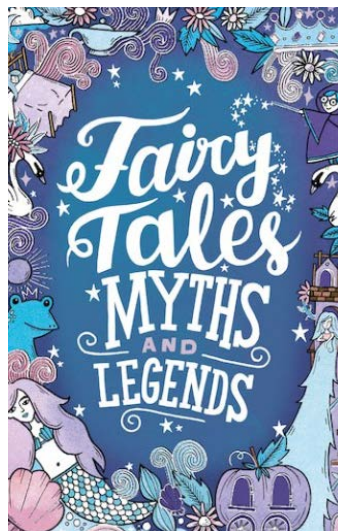


Activity



Solution

but ...



# A simple approach

- A four-step process
  - Decide what's important
  - Source the information
  - Analyse the information
  - Communicate your learning

# Case: A simple study – soup

- What purpose does Project Soup serve?
- How does it do this?
- How did Henry identify the problem?
- Who are the stakeholders he engages with?
- Who does he help? Who helps him?
- How does he communicate with these groups of people?
- How does he promote his project activities?
- How does Henry measure and manage the project?
- Is the idea financially sustainable?



# Overview of the process

- 0: What is important for you to measure?
- 1: Source data
  - Critical success factors
  - Performance indicators
  - Mechanisms
  - Frequency
- 2: Analyse findings
  - Organise
  - Reflect
  - Analyse
- 3: Communicate conclusions
  - Summative > prove (sales, marketing, fundraising, commissioning, procurement etc.)
  - Formative > improve (efficiency, effectiveness, CI etc.)

# Decide what is important

- Organisational objectives are “given” to you
  - From your trustees or a funder
- Drawn directly from business or development plan
- Experienced a need or problem
- Observed a need or problem
  - How?
- Modelled a need or problem



# Storyboard: The process

- Get your stakeholders together
- Work through the following questions and answers in a conversation with your stakeholders
- Build your storyboard from the information that flows
- You should have a narrative that suggests
  - What is important
  - Potential key messages
  - What to measure

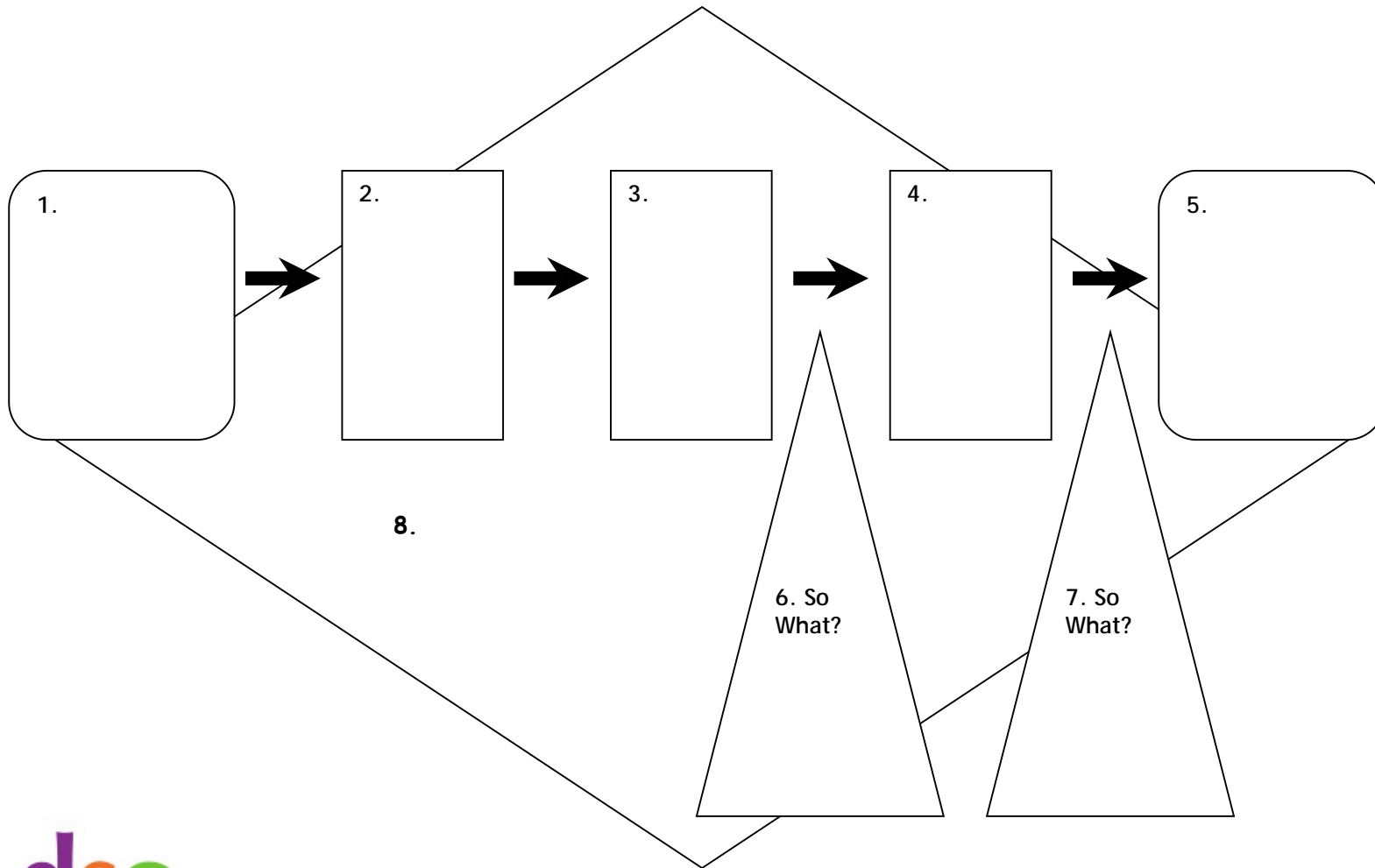
# Storyboard: Questions 1-5

- Q1. Describe the world in which you are working in terms of the local or wider need that your project is addressing.
- Q2. What are you planning to do as part of this project?
- Q3. What effects do you expect to see straight away?
- Q4. What effects and changes do you expect to see in the future?
- Q5. Where possible, describe the long-term changes for people, the environment or the economy that:
  - Your project will contribute to
  - Your project will be wholly responsible for

# Storyboard: Questions 6-8

- Q6. For every immediate effect you identified in 3 above, ask 'So what?' or 'Why is that important?' (Try and describe precisely how each of the immediate effects will lead to the changes in the future.)
- Q7. For every effect and change you identified in 4 above, ask 'So what?' or 'Why is that important?' (Try and describe how the changes will lead to the long-term changes for people, the environment or the economy.)
- Q8. What barriers do you foresee that could prevent any of this happening?

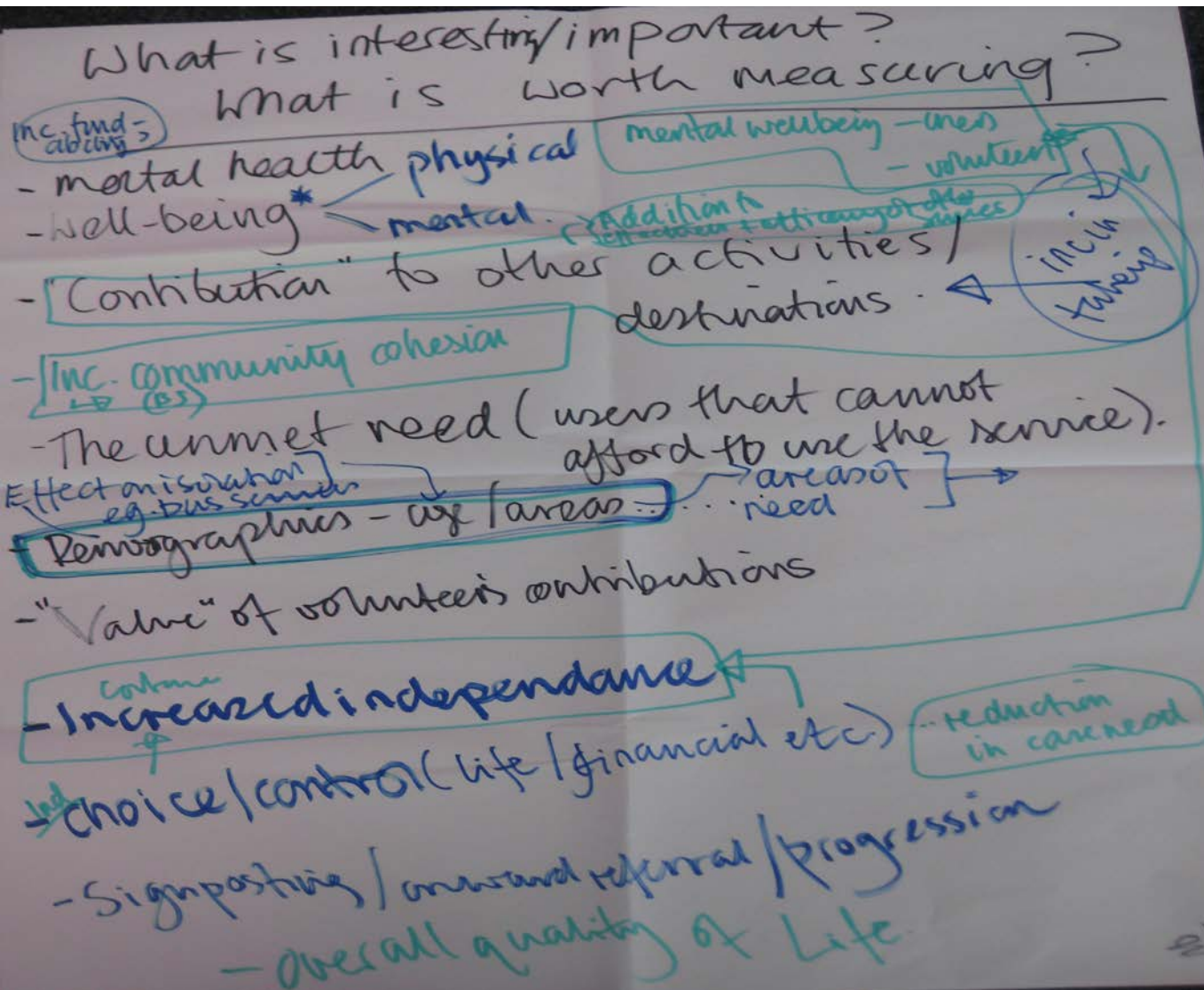
# Firstly, what should you measure?



# Case Study: Analyse We Walk the Line

- ... is a social enterprise that empowers tomorrow's entrepreneurs by selling great tasting artisanal coffee.
- We employ people who need a break, young people at risk of dropping out of education or the disadvantaged who need a second chance.
- We then coach our employees and teach them on the job how to run their own coffee cart. Coaching them over one year to become self-sufficient business people, equipping them with both business and barista skills.
- We reinvest our profits to set up our employees when they are ready with their own coffee cart and pitch, creating a new micro-business.
- We continue to support all our entrepreneurs through a franchise model, supporting them with accounting, marketing and the benefits of bulk buying stock.
- There are three ways you can help people who need a deserving break to be their own boss:
  - 1) Buy our coffee.
  - 2) Buy Social and book us for your next event, launch or ceremony.
  - 3) Ask us to run a pop-up coffee pitch for you.

# What next? Indicators



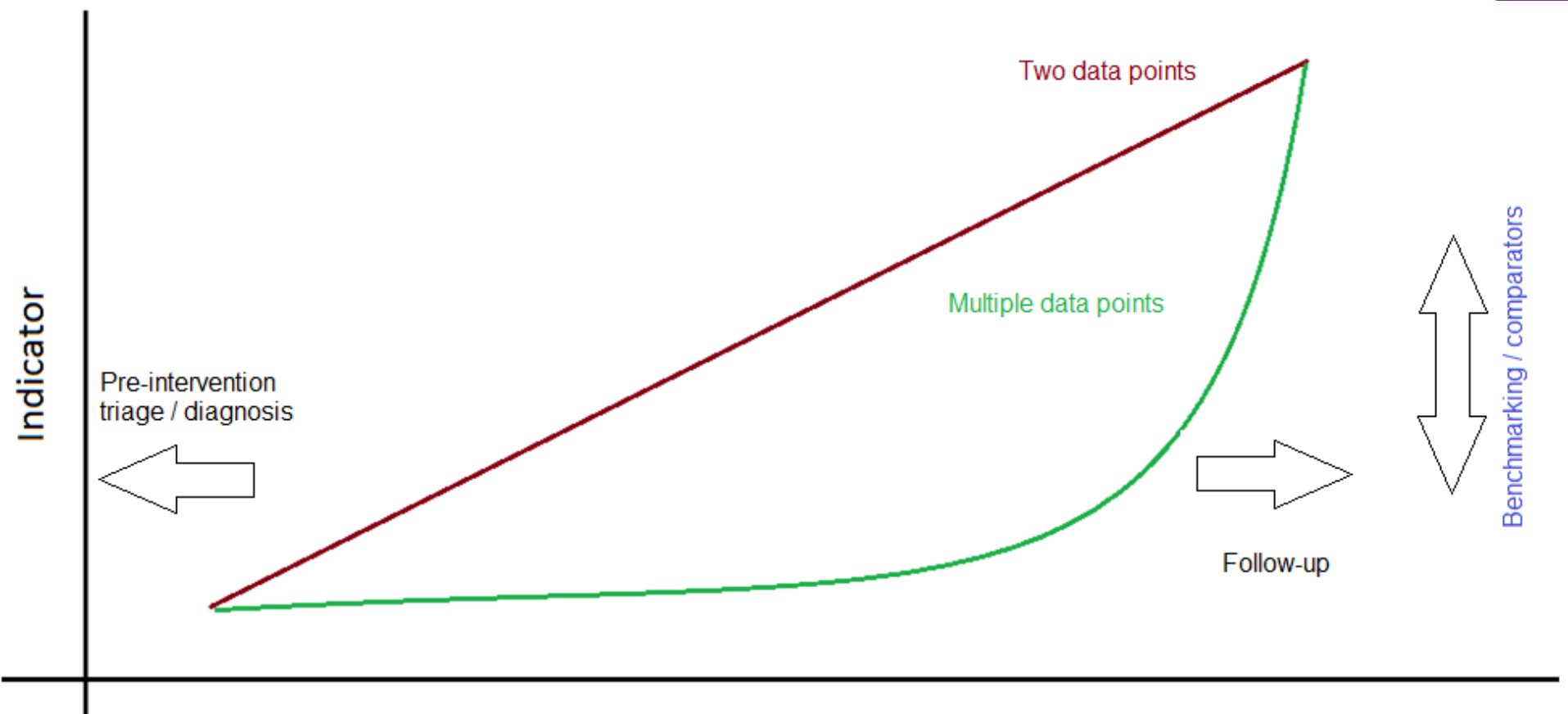
- What is of interest?
- What do we want to measure?
- Why do we want to measure this?

Then

- How do we measure?
- When do we measure?
- What do we compare with?
- What does this tell us?
- Prove or disprove?



# Sampling frequencies ...



## ... and comparators

Internally	Historical performance		
Externally	Nationally / Internationally	Vs. best practice / exemplars	Control/ baseline
	Similar demographics	With interventions (other “providers”)	Without interventions
	In similar areas	With interventions	Without interventions

# Caveat: Indicators ...

- Direct vs. indirect measures
- Quantitative vs. qualitative
- Objective (absolute) vs. subjective (relative)
- Dunning–Kruger effect
- Reporting unforeseen consequences
- Same message for different stakeholders
- Your analysis: Does causation equal correlation?

In the 1990s, diesels accounted for just 10% of the car fleet. By 2012, this had expanded to 50% as the government encouraged motorists to switch to the fuel to cut CO2 emissions.

This succeeded in cutting carbon but at a huge price. Diesels produced 15% less CO2 than petrol cars but four times more nitrogen dioxide (NO2) and 22 times more particulates, leading to a rapid uptick in air pollution that the government is still trying to get to grips with.

# Recall: “Quant” and “Qual”

- Quantitative
  - Financial measures e.g. savings accrued to the public purse, local money flows, tax payer years
  - Health and financial measures e.g. QALY typically from EQ-5D questionnaire
  - Health e.g. increased mobility (proxy time moving or distance travelled)
- Qualitative
  - *Increase* in confidence?
- Q: Gray areas?
  - Support network?

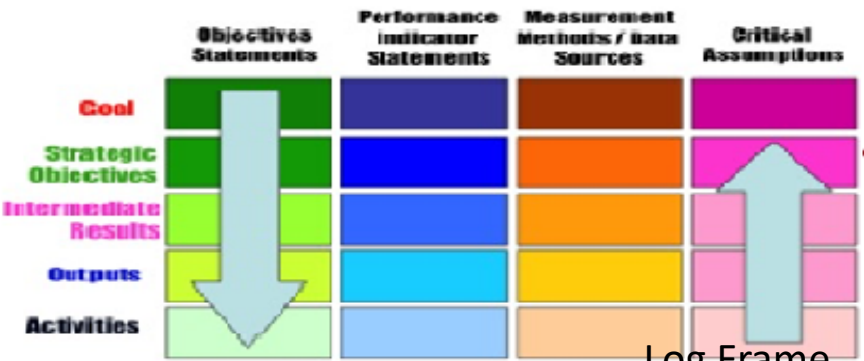


Standard Model

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 effect some sort of change in people, the community, or the environment. For example, providing a service, a programme, or a good to people.	The direct results and beneficiaries. Usually outputs show that certain people received 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 changes. 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 planning, 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.
Why is that important?	Why is that important?	Why is that important?	Why is that important?	Why is that important?
How do you know?	How do you know?	How do you know?	How do you know?	How do you know?

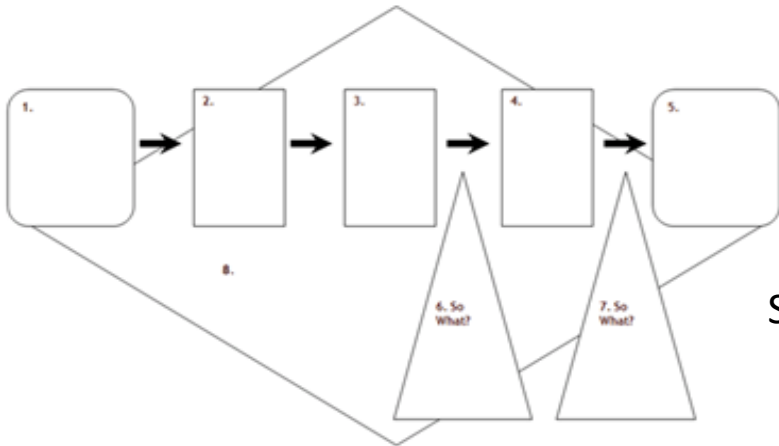
Impact Map

Add Risk and Assumptions



Log Frame

Add co-design



Storyboard

# Practical Impact Map

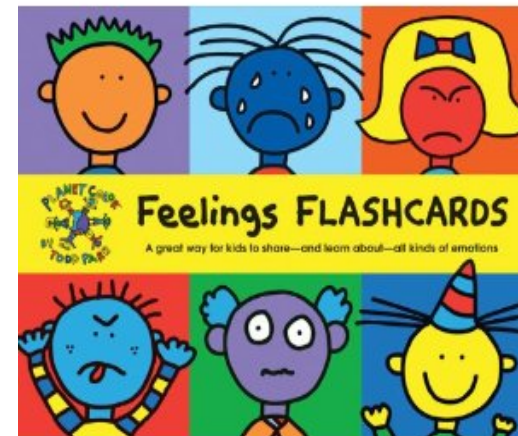
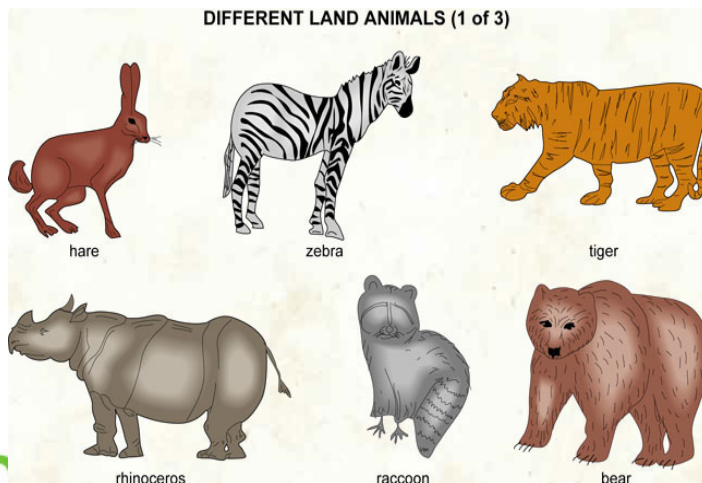
Input	Activities	Output	Outcome	Impact
Indicators				
Sampling mechanisms				
Sampling frequency				
Resource allocation				



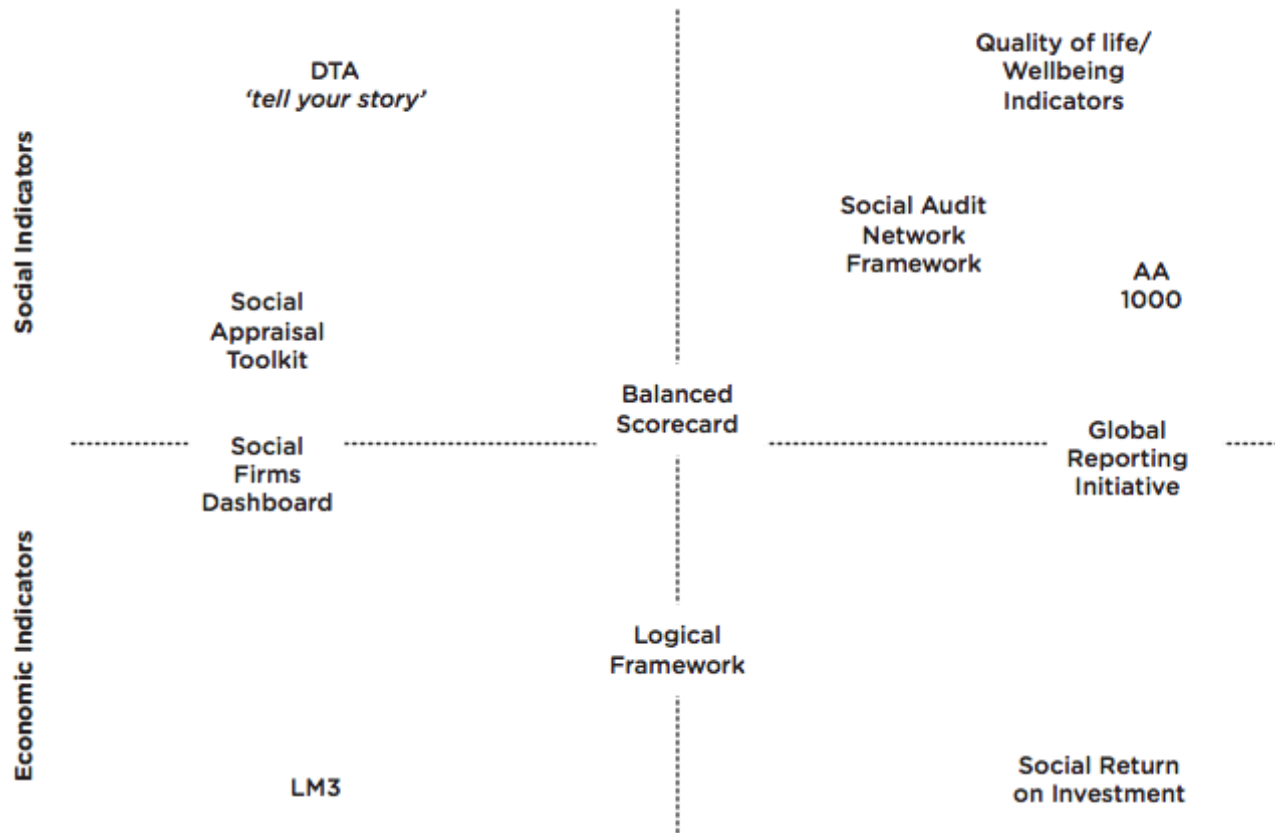
# Some data collection mechanisms

- Registration forms with profile data
- Attendance record and logs (paper registers, online - eventbrite)
- Feedback forms
- Minutes of meetings
- Postcards
- Questions in pub quizzes
- Idea walls
- External/third party evaluation
- Focus groups
- Camera / photos
- Participant observation
- Thought experiment
- Mood board
- Flip cameras
- Visual journals
- Look back move forward  
[www.proveit.org.uk/project\\_reflection.html](http://www.proveit.org.uk/project_reflection.html)
- Outcomes stars  
[www.outcomesstar.org.uk](http://www.outcomesstar.org.uk)
- Online survey  
E.g. [www.surveymonkey.com](http://www.surveymonkey.com)
- Online polls
- Online open text box / wiki
- Storytelling
- Dictaphone – record interviews or record quotes
- Suggestion box / piece of card
- Phone interviews
- Combine – e.g. an event to evaluate, discuss and talk, then capture photos / quotes

# Other ways of collecting data



# Some other approaches



# Some useful tools



The National TOMs Framework - Themes and Outcomes 2018

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Themes	Outcomes
Jobs: Promote Local Skills and Employment	More local people in employment More opportunities for disadvantaged people Improved skills for local people Improved employability of young people More opportunities for local SMEs and VCSEs
Growth: Supporting Growth of Responsible Regional Business	Improving staff wellbeing Ethical Procurement is promoted A workforce and culture that reflect the diversity of the local community Social Value embedded in the supply chain Crime is reduced
Social: Healthier, Safer and more Resilient Communities	Creating a healthier community Vulnerable people are helped to live independently More working with the Community Climate Impacts are reduced
Environment: Protecting and Improving Our Environment	Air pollution is reduced Better places to live Sustainable Procurement is promoted
Innovation: Promoting Social Innovation	Other measures (TBD)

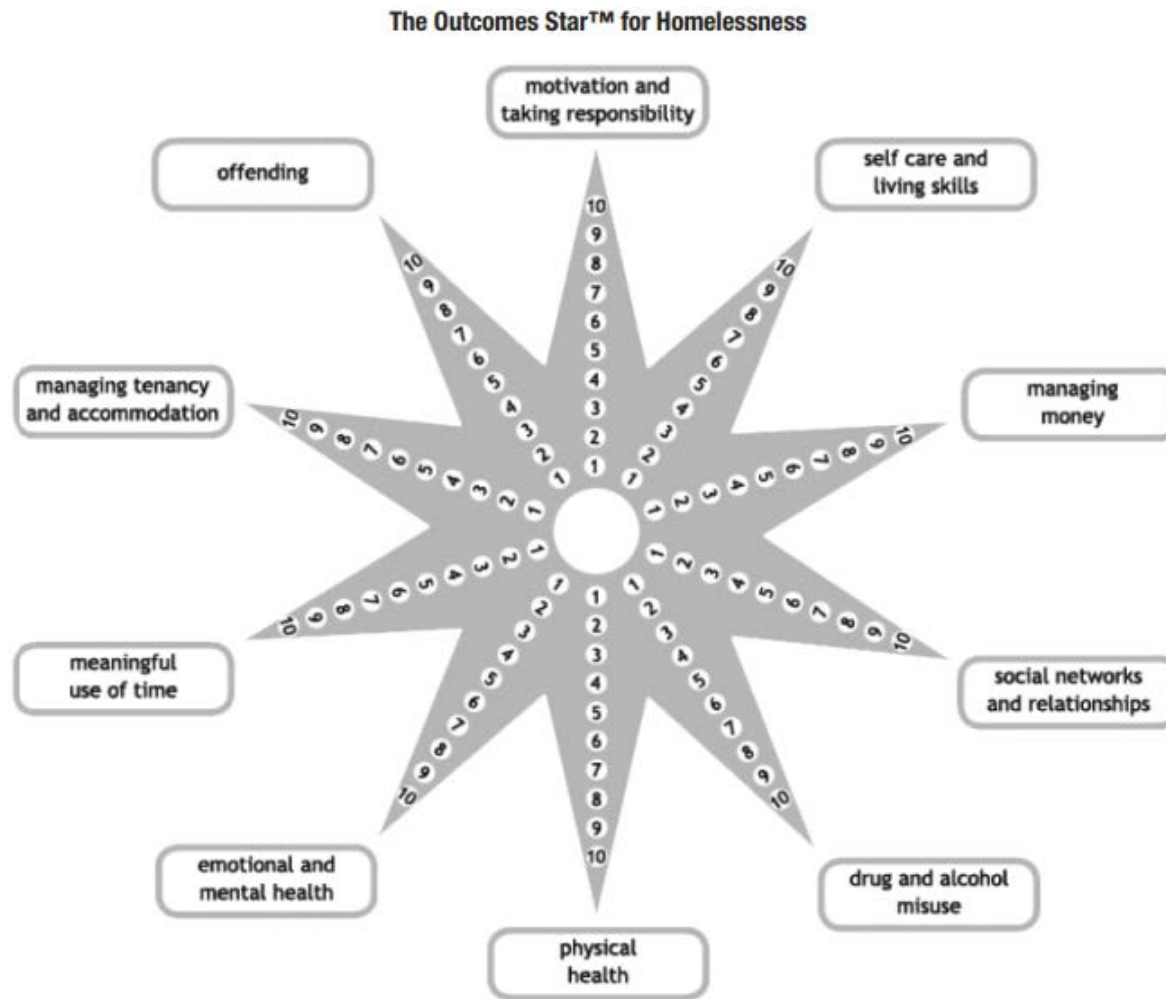
- E.g.
- Financial Analysis of Supporting People
- TOMS (Themes, Outcomes, Measures) calculator
- New Economy Unit Cost Database etc.

**Table 1.3.1** Costs and estimated net benefits per annum of Supporting People services by client group

Client group	Cost (£m)	Net financial benefit (£m)
People with alcohol problems	(20.7)	92.0
Women at risk of domestic violence	(68.8)	186.9
People with drug problems	(30.1)	157.8
Homeless families with support needs – settled accommodation	(32.5)	(0.5)
Homeless families with support needs – temporary accommodation	(17.5)	28.5
Single homeless with support needs – settled accommodation	(130.1)	30.7
Single homeless with support needs – temporary accommodation	(106.7)	97.0
People with learning disabilities	(369.4)	711.3

Outcome category	Outcome detail	Cost code	Cost / saving detail	Unit	Agency bearing the cost / making the fiscal saving		Fiscal value		
					Level 1	Level 2	Estimated cost/saving	Year	Updated cost/saving
HOUSING	EVICTON	HO1.0	Average fiscal cost of a complex eviction	Per incident	Local authority	RSL	€ 6,680	2010/11	€ 7,276
HOUSING	EVICTON	HO2.0	Average fiscal cost of a simple repossession	Per incident	Local authority	RSL	€ 690	2010/11	€ 752
HOUSING	HOMELESSNESS	HO3.0	Homelessness application - average one-off and on-going costs associated with statutory homelessness	Per application	Local authority	RSL	€ 2,501	2010/11	€ 2,724
HOUSING	HOMELESSNESS	HO4.0	Temporary accommodation - average weekly cost of housing a homeless household in hostel accommodation	Per week	Local authority		€ 107	2010/11	€ 117
HOUSING	HOMELESSNESS	HO5.0	Homelessness advice and support - cost of a homelessness prevention or housing options scheme that leads to successful prevention of homelessness	Per scheme	Local authority		€ 642	2010/11	€ 699
HOUSING	HOMELESSNESS	HO6.0	Rough sleepers - average annual local authority expenditure per individual	Per year	Local authority		€ 7,900	2010/11	€ 8,605
HOUSING	BENEFITS	HO7.0	Housing Benefit - average weekly award, across all tenure types	Per week	DWP	Local authority	€ 93	2014/15	€ 94
HOUSING	BENEFITS	HO8.0	Housing Benefit - average cost of processing a Housing Benefit/Local Housing Allowance application	Per application	Local authority	DWP	€ 48	2010/11	€ 52

# Analyse: Outcome Star for Homelessness

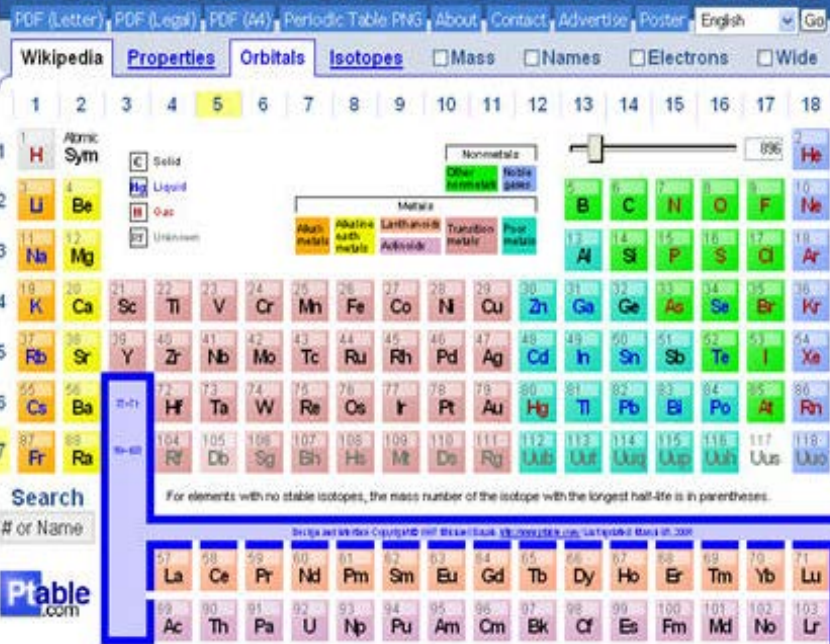


## Step 2: Analyse your impact

- Organise the data
  - Consider or analyse data for themes or patterns
  - Look at social and beneficiary impact, environmental impact, financial metrics, and other aspects of your project or organisation
- Reflect on data
  - Do you have evaluation questions or a question that you are trying to answer in your work?
- Theorise or draw conclusions



# Periodic Table of Elements



- Machine / deep learning?
  - GIGO
  - Context and relevance
  - Patterns IRL or in data sets (replicability)?

“Ready? Sure?”

Whatever the situation or secret moment, enjoy everything a lot.  
 Feel able to absolutely care. Expect nothing else. Keep making love.  
 Family and friends matter. The world is life, fun and energy.  
 Maybe hard. Or easy. Taking exactly enough is best.  
 Help and talk to others. Change your mind  
 and a better mood comes along...”

Meta-horoscope made from most common words in 4,000 star sign predictions

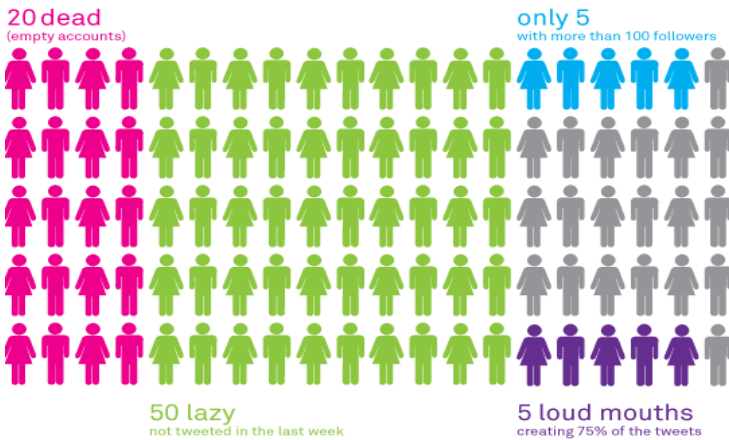
David McCandless - InformationIsBeautiful.net - data: [bit.ly/horoscoped](http://bit.ly/horoscoped)

■ NB: Visualisations almost always help understanding

“We asked our partner organisations how they support volunteers. Here’s what they said”:



Let’s Not Get Too Excited...  
if the Twitter community was 100 people...



by Loudmouth David McCandless @mccandlish // informationisbeautiful.net // @infobeautiful // v1.4 Aug 09  
source: sysomos.com/insidetwitter/ [via rohitbhargava.typepad.com]

## Step 3: Using the insights from SIM

- Internally – impact management and performance management
- Externally – engage stakeholders, beneficiaries, funders

### **Proving and improving, sharing and learning**

- What you have achieved – your impacts?
- How you did it
- What you have learnt / challenges / what went wrong?
- Internally and externally
- Learn and take action on the things that matter

# Reporting to your stakeholders

- This is about sharing the value of what you do with appropriate stakeholders
  - Not just for those supporting you
- Think about the communities that *you* support
  - How best to reach them?
  - Use of different media
  - How best to explain what you do?
  - How can you make it interesting?
- Use the language and culture of the user of information





# Case Study: Tone, channels & messaging

Haringey Advisory Group on Alcohol  
ANNUAL REPORT 2008

**Haga**  
STORIES, ADVICE & MORE

Your problems answered!  
**ASK GAIL** page 15

I'm so glad I made  
**THAT FIRST CALL**

**cosmic**  
Super support for  
you and your family!

Sober, and...  
**QUALIFIED!**

**CYCLING TO SOBRIETY**  
Service users cover 1000k



## Services for children

The Refugee Council provides the only service to which all children who arrive alone in the UK are referred. For twenty years the Children's Section has been a one stop shop for these children, supporting them through making their asylum claim, and with homework clubs, maths and English classes, therapeutic services and social activities.

- Our My View project supported **187** children through one to one counselling, therapeutic creative work and group activities.
- We provided **249** children who arrived at our new reception centre in Dover with a hot shower, clean clothes and a warm meal.

*"I came in contact with the Refugee Council Children's Section on my first day in the country. I received utter kindness and care. I was only 15 years old. I will never forget the support I received. I have now graduated from university and am working as a nurse. Thank you to the Refugee Council for saving my life."*

Young girl supported by our Trafficked Girls' Project



Children across the UK send messages of welcome to refugee children

**In 2015-16, we helped 3,658 children. This is an increase of 66% from the previous year.**

Many of the children we support have witnessed the killing of loved ones, some have been forced to become child soldiers, or have been trafficked and forced into domestic servitude, sexual exploitation or other forms of forced labour. Nearly all have undergone long, lonely and terrifying journeys. Many arrive traumatised and can be targeted by criminal gangs, or placed unlawfully into adult detention centres. Our Children's Section is there for all of these children.

**In 2015-16:**

- We supported **164** children who had been trafficked.
- Our Age Disputes project is the only project in the UK with a focus on visiting children in detention to help them demonstrate their age and secure their release from detention.
- We supported **292** separated children with maths and English classes, a busy programme of homework clubs, as well as drama, art, and music sessions.



A child supported by the Children's Section draws their traumatic journey

### Qasim's Story

My View is one of many of the Refugee Council services available to children like Qasim. Qasim fled Ethiopia alone. After a horrific journey he arrived in the UK. He was 16 years old, alone and traumatised – experiencing severe anxiety, insomnia and flashbacks.

He came to the Refugee Council for one to one therapy sessions. As a result, Qasim's sleep dramatically improved and he ended the sessions happier, calmer and more in control of his mental wellbeing.

Thanks to the support of the Refugee Council, Qasim is thrilled to be back in college. He is working hard to build a life for himself and is looking forward to the future.

8

## The impact of long-term youth voluntary service in Europe

voluntary service can positively impact understanding between regions and has the potential to contribute towards the integration of less advantaged young people.

Economic analyses are a promising way to get a feeling for the size of the impact which voluntary service can have. Preliminary analyses of EVS show that it probably does at the very least pay for itself in terms of the value of work done in relation to the cost of the program – and may produce substantial additional value.

The main methodological weakness of the studies taken together is that the vast majority are retrospective designs which are very subjective and give very weak evidence of impact. There are very few studies which use the kind of more valid designs which are standard in social science research, i.e. comparing changes amongst service volunteers with changes in non-volunteer groups, and/or comparing pre-service scores with post-service scores. This small collection of good studies is simply too modest to be able to provide really valid answers to questions about the impact of youth voluntary service in Europe. It also means that evidence for impact in the vast majority of studies is based on the highly subjective recollections of volunteers and program officers which certainly view programs through "rose-coloured spectacles."

Although the available evidence is very encouraging, the research conducted in Europe to date on the impact of voluntary service has had neither the methodological teeth nor the mandate to really test whether voluntary service works as advertised.

A range of recommendations for programming and for research are made at the end of this review, in particular:

- Stakeholders should be aware of the extraordinary impact and future potential of voluntary service as a toolbox for social change
- Voluntary service programs should be specific about the specific changes they are trying to bring about in their volunteers and beyond, and include specific, evidence-based components in their programs which are known to lead to those changes.
- Voluntary service in Europe has a tradition of crossing borders, and by doing so contributing to the intercultural development of volunteers and of communities. But the borders between EU member states are no longer challenging enough. Voluntary service should realign itself to the new hot borders: borders between the EU and states to its south and east; borders of potential and former conflict, for example in the Balkans; and borders inside states, for example inside mainstream and minority communities.
- Voluntary service needs to adopt a culture of evidence-based practice.
  - Stop wasting money on traditional evaluation approaches which provide at best anecdotal evidence of voluntary service impact
  - Develop approaches to assess the economic impact of voluntary service
  - Develop a Europe-wide impact measurement framework (questionnaires etc.) – simple, standard, freely available and widely applicable

04

T 0207 346 1205 [www.refugeecouncil.org.uk](http://www.refugeecouncil.org.uk)

# Checklist: Evaluation report

- Vision / mission
- Problem or need – give context
- Overview and activities
- Outputs
- Outcomes / impact
- Performance: summing up achievements / overall evaluation
- Learning: Be open about what you have learned and changed



## Action Plan: What is your next action?

[illegible]

# Some useful links

- [www.nefconsulting.com/our-services/evaluation-impact-assessment/prove-and-improve-toolkits](http://www.nefconsulting.com/our-services/evaluation-impact-assessment/prove-and-improve-toolkits), Prove and Improve (taken into NEF) is a good summary of mainstream tools
- CAN Invest, <https://muesli-impact.org/>
- <https://impactsupport.org> Impact management programme (diagnostic)
- [www.redochre.org.uk/resources/publications-and-reports/](http://www.redochre.org.uk/resources/publications-and-reports/)
- [www.thinknpc.org/resource-hub](http://www.thinknpc.org/resource-hub) for useful resources
- [www.socialvalueuk.org/report-database](http://www.socialvalueuk.org/report-database) (formerly SROI Network) for reports
- [www.socialvaluehub.org.uk/resources](http://www.socialvaluehub.org.uk/resources) for useful resources, specifically focused on the Public Services (Social Value) Act 2012

# Closing Exercise: The 5Ps

- **Purpose.** What does your organisation wish to achieve? Your vision, goal or objective
- **Pain.** What problem does your organisation solve?
- **Premise.** How you solve the problem. What do you actually do?
- **People.** Who do you help? Who runs the organisation/ Stakeholder engagement etc.
- **Prove it** to me (what is your track record, Social Return on Investment, Social audit, outcomes reporting, local money flows etc.)