

# Our Guide to Impact Measurement



**SAMTALER** 

# Introduction

What's your yardstick for success? How do you know when something is going well or when it's time to shift course?

All of us are used to using metrics, numbers and stories to track our progress at work and whether we're counting pounds and pence, products produced or monitoring how long things take, measurement is usually fairly straightforward.

But what about social value? How do you measure something that seems intangible? How can you really know what difference your organisation makes to people, places and the planet? How can you measure success without it requiring a full-time team of social impact measurement experts? And how can you shout about your successes without it morphing into hyperbole?

# The Obstacles

If you think your organisation is struggling to measure social impact effectively then you are not alone. From obsessing about numbers, to ignoring intrinsic problems within an organisation such as how staff are treated or the carbon footprint of your supply chain, there are lots of really common problems we encounter time and time again across both the public and the private sector.

# Red Flags

Here are our top red flags that suggest an organisation needs to re-evaluate how it measures and evaluates 'how it makes a difference':

1. You don't know what to measure
2. You don't know how to measure it
3. You claim credit for too much
4. You don't have an easy way to collect the data
5. Social Value sits in a silo
6. You drift towards only doing things that can be easily measured, not those that are most impactful
7. You only want to focus on the numbers
8. You only want to focus on the stories
9. You only want to use the data for external 'good news' stories
10. You struggle to get staff buy-in

# Back to Basics

The good news is that impact measurement can be as simple or as complicated as you like. Genuine social value should benefit your bottom line, so there will always be that marker, but given the long term pay off for many social value initiatives it can be helpful to have some more immediate feedback by way of impact measurement.

At Samtaler, our approach is, unsurprisingly, very practical, and we believe that your measurement and evaluation should not be a burden either in terms of the social value you are creating, or your core business.

Our general rule of thumb is to encourage you to think first about what you do as an organisation in terms of your core business, how you will do it better, and then consider measurement that captures what it needs to in order to drive improvement.

Measuring your social value requires you to be clear about the outcomes you are setting out to achieve and committing to strategic monitoring that will enable you to actively track your progress and result in exciting, tangible achievements that you can communicate to both your internal and external stakeholders.

# 5 Top Tips for Effective Impact Measurement

# Tip 1

## Separate outcomes from outputs

Words such as 'impact', 'evaluation', 'outcome' and 'output' often seem to be used interchangeably but there are important differences.

Outcomes – are the specific changes, benefits, learning or other effects that happen as a direct result of your work.

Outputs – are the detailed activities, services and products you do or provide to achieve the outcomes.

For example, a company in Leeds wants to employ more Armed Forces leavers in their company and knows that there is social value in doing so. The outcomes they want to achieve are a 10% increase in the number of service leavers recruited by the company and an increase in the number of service leavers and their families in Leeds who are confident in the transition to civilian life'.

# The Outputs

The outputs might include a recruitment brochure targeted at Armed Forces personnel, training for HR to understand Armed Forces qualifications and establishing a service leaver buddy system at the company to ensure new employees are supported effectively in the workplace.

Output and Outcome Indicators are the data they need to collect to show that these things are happening.

For the outputs above, output indicators could include:

- Number of recruitment brochures distributed to armed forces resettlement teams.
- Number of HR staff trained in recruiting armed forces personnel.
- Number of buddies trained and ready to support service personnel in the workplace.

This is the 'bums on seats' data – how many people are you engaging in your project or workstream? It's an important part of the puzzle but it cannot be the only part.

# The Outcomes

For the outcome indicators could be:

- Percentage increase of service leavers recruited into the company during a specific period.
- Number of people supported in the transition to civilian life by the employment of service personnel (tracking service personnel plus their immediate family members where applicable).
- Number of service personnel who report increased confidence in the transition process since securing employment.

This is the 'so what' data – what is the difference made by getting those people engaged in your project or workstream in the first instance?

Beckie Denny, our resident Impact Evaluation expert at Samtaler, says *“With every set of outcomes, we ask why?” Why do you want to achieve that outcome? It can help to keep asking ‘why’ until you really uncover the change you want to make. This helps you to identify the wider impact that your project is contributing towards. Impact is the broader long-term change happening for individuals, the community or even on a societal level. It is something you are likely contributing to rather than being the sole creator of, something that is exciting and headline-worthy.”*

# Tip 2

## Be selective about what you measure

Whilst it is good to gather data as evidence it can quite rapidly become very time-consuming, or the volume of data collected can become too large for effective in-house analysis.

There is a whole industry out there vying to help you measure and communicate the difference your organisations is making, and the conflicting terminology, myriad tools and metrics available, can quickly become confusing and all consuming.

Often, we get nervous that we will miss something important if we don't measure it which can lead to an unsustainable amount of data collection which burdens your staff. Occasionally we feel like 'rabbits in the headlights' and therefore don't start gathering any data at all which can be unproductive for the project.

If you're wondering how much to measure, then it can be helpful to start with a long list of all the possible things you could measure about your outcomes and outputs. Get everything down on paper in one long list then take a step back.

What is the purpose of your evaluation? What will your business do with this information? Is it about informing others of what social value you are adding? Is it motivating staff with how much the company is achieving in the community? Is it so you can develop future business programmes or areas of work? Is it because you are required to evidence your social value in tender processes?

Which of the indicators that you have listed are going to help you fulfil these purposes? Select the indicators that best demonstrate change is happening and the ones that will be most useful when communicating your project goals.

Don't choose too many. Two - three indicators per outcome is enough to measure change and 1-2 indicators per output is plenty to ensure the output is happening within the scope required.

Angela Halliday, Director of Social Impact at Sodexo, told us: *"Reporting isn't all about data. We measure what we value. Doing stuff for the right reason is the most important way that any organisation can truly embed and demonstrate their social value commitments. The measurement and reporting then comes naturally."*

# Tip 3

## Expect the unexpected

It is important to be aware that sometimes unexpected changes occur as a direct result of our work or projects. These unexpected outcomes are important to capture as sometimes they are more powerful and exciting than the outcomes we set out to achieve. So how do we leave space for the unexpected?

Ensure that you are regularly capturing qualitative data as well as quantitative. Collate case studies, interview staff members, talk to community members. These conversations will be where you get the first inkling that something you didn't expect to see is happening. This is most often positive, but sometimes you may hear of negative changes that you hadn't anticipated because of your project so be prepared to act quickly on the new information. Make sure you have planned qualitative 'touchpoints' in your routine monitoring and evaluation framework.

If you identify either positive or negative unexpected outcomes, then ensure that you respond to these. Do you need to adjust what you are measuring or add an indicator in to monitor the new outcome? Perhaps you need to put in place additional support to mitigate any negative outcome you didn't anticipate.

# Tip 4

## Get staff buy-in

It is important that from the earliest stage possible measurement is embedded into the workflow for your project and that staff buy-in is sought. Once staff understand the value of the data they are gathering then they are more motivated to ensure it is collated in an effective way and take ownership of the process.

*“If data is gathered but never analysed or reflected upon it can be demoralising to the team involved in collecting the data but if the findings are celebrated, actioned and communicated then staff become more engaged in the importance of taking part in the monitoring and evaluation process.”* Beckie Denny, Samtaler Impact Evaluation Expert

# Tip 5

Own your part in the chain (and don't claim what isn't yours!)

The difference between outcome and output was discussed but what is the importance of understanding the difference between outcome and impact? Impact is the broader, long-term change that we are seeking to contribute to in society or our community. Impact statements quite rightly sit at the head of most theories of change (where we start with the overall impact we want to have then work backwards to work out the activities and outcome steps along the way).

In the example of recruiting service leavers, the impact that you are working towards achieving may be something as broad, but important, as 'all service leavers in the UK are able to find a job when they leave the Armed Forces'. The example given of a particular company's service leaver recruitment pathway is an important part of this but the business can't claim that they are solving all service leaver recruitment in the UK.

They CAN claim their clear, specific outcomes of ‘a 10% increase in the number of service leavers recruited by our company’ and ‘an increase in the number of service leavers and their families in Leeds who are confident in the transition to civilian life’. These are contributing to the wider aim of companies working together to provide Armed Forces personnel with job opportunities but are very clearly outcomes that the Leeds-based company can claim they are specifically achieving.

Owning your part in the wider impact chain is important but don’t overstate what you are doing. Be proud to claim your outcomes and the journey towards the overall impact which you are supporting. Qualitative data can provide a brilliant insight into the real lives you are impacting. Case studies and quotes can also play an essential role in communication, both internally and externally and you might also identify third sector partners you want to work with to maximise the benefit of your particular projects and make a greater contribution to the impact you want to see.

Wherever your organisation is on its social value journey, it’s essential that you focus on delivering ‘action’ before ‘words’. There is plenty of time to shout about what you’re doing once you have a real story to tell. What’s more, if you are creating social value in a genuinely meaningful way, much of the communication should arguably be taken care of by your suppliers, staff and customers becoming your ambassadors.

# Glossary

## **Data**

Facts, statistics and other raw material gathered for a specific purpose. Data needs to be interpreted to give it meaning.

## **Evaluation**

Using monitoring and other data you collect to make judgements about how well your project is doing.

## **Impact**

The broad or long-term difference made to a group

## **Monitoring**

The routine, systematic collection and recording of data about a project, mainly for the purpose of checking its progress against its plans.

## **Pilot**

A way of testing out the effectiveness of a new system by applying it to a small group and getting feedback on the process.

## **Intermediate outcomes**

Steps along the way to end outcomes. They are often smaller changes that need to happen before the final, desired outcome can be reached.

## **Outcomes**

The changes, benefits, learning or other effects that happen as a result of your work.

## **Outcome indicators**

Things you can measure to show whether your desired outcomes have happened. They can be qualitative or quantitative.

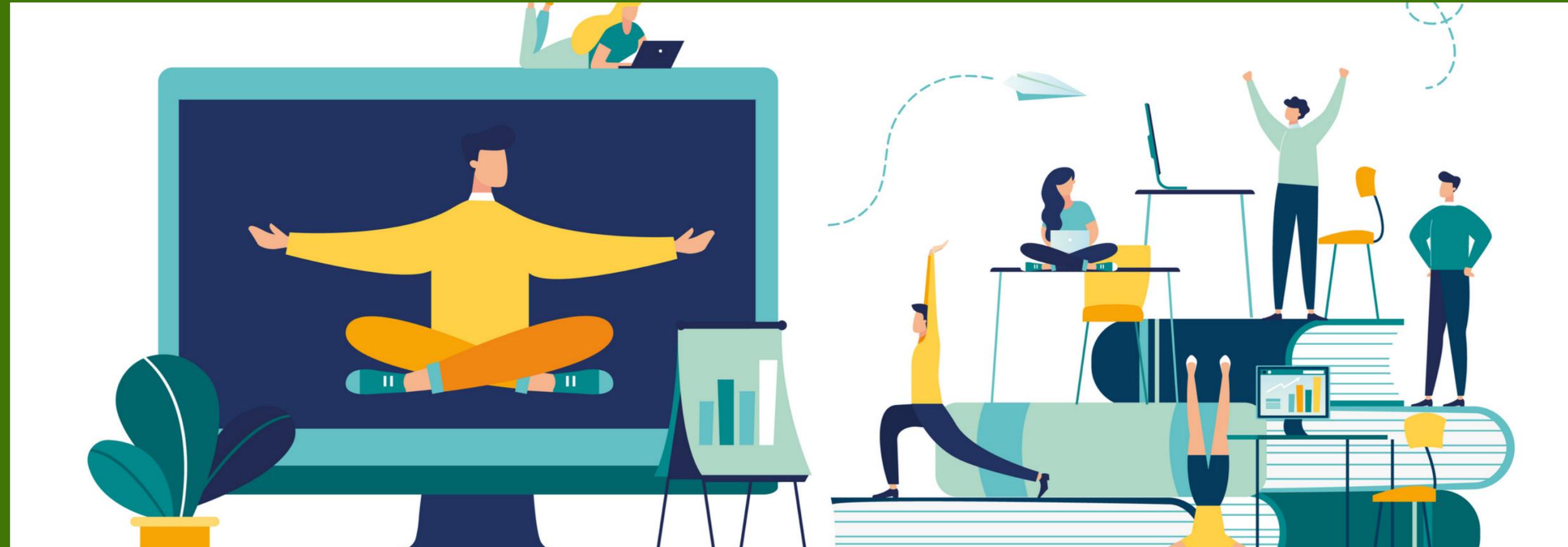
## **Outputs**

All the detailed activities, services and products you do or provide (the deliverables).

## **Output indicators**

Things you can measure to show whether, and to what extent, your planned outputs have happened.

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