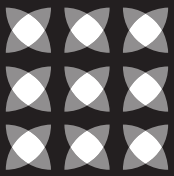

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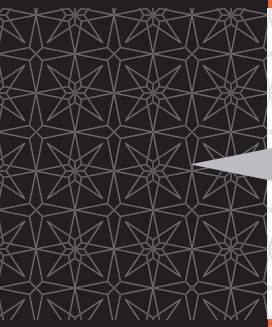

THE COMPASS:

your guide to social impact measurement

November 2014

The Centre for Social Impact believes identifying, evaluating and communicating best practice in the delivery of social outcomes is essential to create meaningful and sustained change. We measure what matters, and The Compass is here to help you understand how you can measure what matters too.

Find out more at www.csi.edu.au

THE COMPASS:

your guide to social impact measurement

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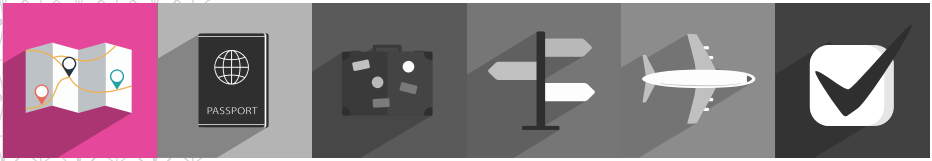
1. STARTING POINT



In this chapter you will find your way to:

- *Who this guide is for*
- *Why we all need to find a way to effectively measure social outcomes in Australia*
- *How to use this guide*
- *Learning the local language: the difference between outputs, outcomes and impact*

THE COMPASS – WHAT IS IT ABOUT AND WHO IS THIS GUIDE IS FOR?

The Compass is your guide to navigating social outcomes and impact measurement. This guide is for everyone working towards the creation of positive social impact in Australia and who wants to know if they are making a difference.

What isn't it? It's not a set of frameworks, or a textbook, or a jargon-packed treatise on outcomes measurement.

At the Centre for Social Impact we recognise that traversing measurement literature, guides, tools and approaches can be challenging. If you are interested in understanding whether, and how, social change has occurred and you are taking steps to measure (that is, "assess the importance, effect or value" of what you do)[1] and communicate social impact, this guide is for you. *The Compass* explores and explains key topics, concepts, questions and principles of outcomes measurement.

WHY WE ALL NEED TO FIND A WAY TO EFFECTIVELY MEASURE SOCIAL OUTCOMES IN AUSTRALIA

Around one in five people in Australia have a mental illness[2] and almost one in five a disability[3], increasing their risk of being out of work, having a lower level of education and being socially isolated. We have rising health and aged care costs, but a shrinking workforce[4] and the highest level of youth unemployment in more than a decade.[5] More than half a million children (0–14 years) in Australia live in jobless families.[6] We battle with housing affordability and availability[7], and homelessness.[8] And the gap between Indigenous and non-Indigenous Australians remains vast in many areas.[9] Australia's position on the international inequality list has risen.[10] This is not just a problem for those who are being left behind; it also affects the functioning of society and the stability of the economy.[11]

This is at a time when we spend around $300 billion a year on social purpose and where government resources are becoming increasingly scarce. Now, more than ever, Australia needs to concentrate on making progress on social outcomes. We need to focus on what we want to achieve, how we will meet these goals and whether, where, and under what circumstances, we're making a difference.

Our social progress has arguably been stymied because we haven't concentrated enough on outcomes. Together we've created a social purpose system that has good intentions, but more often focuses, counts and funds what and how much we do, rather than whether we are making a difference. We need to know whether people are really any better off. If you're outcomes-led you may find yourself asking questions like:

- Are our children, young people, adults, our aged, families and communities any happier, healthier, or have a better quality of life?
- Are they more able to participate in education, work, their communities and socially? Are people more resilient, included and connected?
- Do we know whether services, enterprises, innovations and supports are changing lives, communities and society?
- Do we know where to spend and shift our limited resources for social change?

To be able to answer these questions, we need to focus on outcomes and impact. We need to be clear on what outcomes we're trying to achieve, how we can achieve them and if, where and why they are occurring. This will help us focus on what we want to achieve, how we go about achieving it, where we invest resources and effort and whether we are making a difference.

There is a plethora of literature on evaluation, outcomes and impact measurement. But outcomes and impact measurement isn't easy to navigate, so this guide has been developed to help you find your way.

HOW TO USE THIS GUIDE

The guide is divided into six chapters. Each chapter starts by outlining key learning areas. The sections unpack these areas and introduce and discuss key concepts and approaches, provide a summary of key points and finish with key questions to help you consider "What does this mean for me?" or "What do I do next?".

LEARN THE LOCAL LANGUAGE: THE DIFFERENCE BETWEEN OUTPUTS, OUTCOMES AND IMPACTS

Note: *A glossary of key terms and concepts is included in Appendix A: The language of measurement*

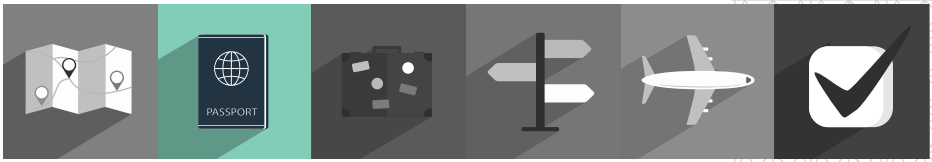
Before you start exploring the terrain of outcomes measurement, it's important to understand the difference between outputs, outcomes and impact.

Outputs are the direct products or services resulting from your program or interventions activities.[12] For example, it might be the number of people, places, supports or activities your program has produced.

Outcomes are changes in attitudes, values, behaviours or conditions. They are changes that occur between a baseline and subsequent points of measurement. These changes can be immediate, intermediate or long-term.[13]

Defining impact is trickier. It is used differently across and within disciplines and approaches. For example, in development literature, 'impact' refers to any program effect or outcome change attributed to an intervention. In the social sector 'impact' usually refers to *longer term effects*.[14] In this guide, 'impact' is defined as the longer-term outcomes that are achieved from the activities, outputs and outcomes of an intervention, program, organisation or sector. Impact can be "positive or negative", may occur "directly or indirectly" and might be "intended or unintended".[15] It is not always possible to attribute impact to an individual intervention, program or organisation.

2. WHY ARE YOU TRAVELLING?



In this chapter you will find your way to:

- *The benefits of measuring social outcomes*
- *Why we get stuck implementing outcomes measurement*
- *The reasons outcomes measurement is challenging*

THE BENEFITS OF MEASURING SOCIAL IMPACT

Much has been written about why measuring outcomes and impact matters for different sectors, issues and portfolios. Many of these reasons can be grouped in three categories and are shared across social purpose groups and sectors. They include:

Knowing you really are making a difference

This is arguably, the most important reason to measure outcomes – so that it is clear to the public, supporters, advocates, funders, leadership and employees of organisations and agencies that their initiatives and programs meet the values, missions and goals they aspire to and espouse. Organisations can talk a lot about the work they do and the number of people they work with, but are they really making a difference?[16] Without measuring outcomes and impact, you can't know for sure.

Building better social purpose organisations

There are numerous potential organisational benefits to measuring outcomes, these include: creating a culture of learning and innovation, professional development, better and more meaningful communication, an increased reputation for transparency, trust and efficacy (and the brand value that follows), and sustainability.

Learning and development is just one of these advantages.[17] For example, a better understanding of client needs and satisfaction can increase organisational knowledge and performance.[18] Understanding what works and does not work for different people or different contexts is important to inform how to tailor, refine, amend, shutdown or expand programs or initiatives.

Measuring outcomes can also assist organisations and enterprises to appeal to funders and donors[19], increase organisational legitimacy and communicate and celebrate achievements.[20] For any sector, having outcomes to communicate will assist with a narrative for politics and policy, advocates and supporters, and a trusted profile – which leads to positive exposure.

It is also becoming increasingly recognised that measuring outcomes is a critical factor in organisational sustainability. This is partly because measuring and reporting outcomes will help drive funding and increase competitiveness in the market. With effective, shared measurement organisations can benchmark themselves[21]; better understand their client/customer base; provide a better service[22] and become more competitive in the market. Current shifts are forcing this to come about. Governments and other funders are increasingly expecting or requiring outcomes to be measured and changes in the marketisation of social sectors (like the National Disability Insurance Scheme) mean individual customers will make decisions on who they purchase services and resources from. If the right information is available, empowered, informed consumers will use outcomes to make decisions about the services and supports they access to improve their lives.

Accountability and increased efficiency

Accountability and compliance are one of the primary drivers for why different groups measure outcomes. Not for profit organisations, social enterprises and businesses are each accountable to a range of stakeholders – funders, shareholders and donors, for example.[23]

Accountability to the public is also important. When governments provide tax benefits for social investments, "it is reasonable to demand that the money be wisely invested to create as much social impact as possible".[24] In Australia, government accountability to the public for how they spend their funding increased in 1997 with the *Financial Management and Accountability Act*. The Act required government to evaluate and report against how it expended its finances. Similarly, its replacement – the *Public Governance, Performance and Accountability Act* of June 2013 – requires the appropriate management of public resources and annual reporting of the performance (not just financial performance) of Commonwealth funded entities.

Complementary with accountability is increased efficiency. Governments have limited resources and the burden on other sectors is increasing. Individuals and organisations want to know whether donations and investments are providing returns and if funding is best being invested.[25]

If the arguments for measuring outcomes and impact are strong, why and where are we getting stuck implementing effective measurement?

WHY WE GET STUCK IMPLEMENTING OUTCOMES MEASUREMENT

There are a range of challenges that organisations, governments, enterprises, businesses and individuals face when measuring social outcomes.

1. **It's hard!** Collecting and reporting on outputs and activity is a much easier, more achievable and familiar option.

2. **You may be travelling without a GPS.** You may have a lack of clarity about why measurement is beneficial within organisations and/or with stakeholders, or, you may have no theory of change within your organisation and therefore, you can't understand what should be measured.

3. **You've got no or inaccurate coordinates.** Data can be poor, siloed, inappropriate, incorrect and/or missing. There may be a lack of clarity around what is being measured. Outputs can be misinterpreted as outcomes. Proxies to measure change can be very poor (sometimes meaningless). Indicators might be poor quality. Also, data is often siloed, meaning that linking data is very difficult or impossible and there is rarely shared measurement (across program, organisational, sector and/or population levels).

4. **You've got timing issues.** There are numerous potential resource, capacity and capability limitations when it comes to measuring outcomes. Measuring outcomes requires capability – knowledge, skills, tools – and capacity. Time is also difficult to make decisions around: should data be collected retrospectively, in a snapshot, or longitudinally? How can measurement be aligned with budgets, planning, correction and action decisions?[26]

5. **You're lost.** It can be difficult to navigate the complexity of different types of tools and approaches to measurement. You may be wrestling with questions like: Which tools and/or approaches provide a best fit for what needs to be measured? What are the most appropriate indicators? How can the practical challenges around data collection and analysis be overcome and should 'immeasurable' outcomes be measured?[27]

6. **You can't see the wood for the trees.** There may be systemic and organisational distractions and barriers, including: the fact that incentives and funding aren't usually tied to outcomes; competing contractual demands mean required reporting may not include outcomes and/ or contracts may prevent the sharing of results.

7. **Not everyone wants to go on this journey with you, or you hit some big roadblocks along the way.** There may be a lack of transparency and/ or fear of sharing failures or problems, the need to know and hold attribution may inhibit the progression of measurement, and there may be a lack of senior management/ leadership support for effective measurement.[28]

In summary, despite your role or sector, the answer to the question "Why measure outcomes?" is this – because we can't afford not to. While not all outcomes or impacts can be measured and you will hit roadblocks on the path to effective measurement, there are steps you can take to ensure you progress.

SO WHAT?

Key questions to consider

- *Why are you/should you measure social outcomes and impact?*
- *Does your program/policy/initiative really make a difference? Under what circumstances? What could be improved?*
- *Where are you getting stuck implementing effective outcomes measurement?*

3. YOU'VE DECIDED TO TRAVEL

NOW IT'S TIME TO DECIDE WHERE YOU ARE GOING AND WHAT YOU'RE TAKING WITH YOU

In this chapter you will find your way to:

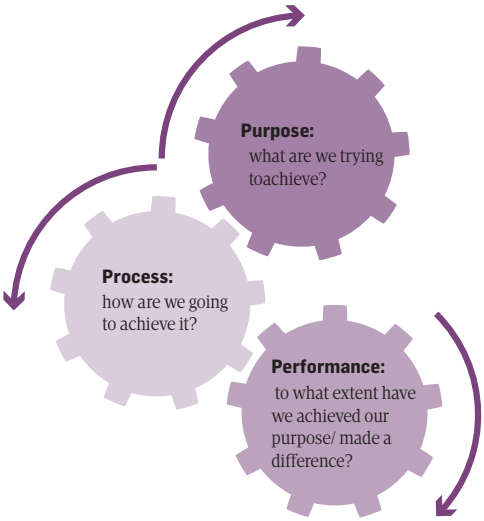
- *Integrating social outcomes measurement*
- *Purpose and connecting purpose to processes and theory of change*
- *Problems and complexity levels*

INTEGRATING SOCIAL OUTCOMES MEASUREMENT TO ACHIEVE SOCIAL IMPACT

If an organisation, agency, enterprise or business aims to achieve social impact, social outcomes measurement should be an integrated, interdependent part of strategy and day-to-day operations. This can be thought of as a three-step process:

1. **Clarifying purpose:** identifying the social impact goal(s) of your organisation
2. **Determining and articulating process:** understanding how the social impact can be achieved; and
3. **Measuring performance:** knowing if, under what circumstances and to what extent change has occurred.

Three Ps to achieving social impact: integrating social outcomes measurement into organisational strategy, narrative and day-to-day operations



The 'three Ps' components (purpose, process, performance) are interdependent. Without purpose, it will not be clear what should be measured. Without understanding how purpose is going to be achieved, it will not be possible to understand whether and why change might have occurred. And without measuring performance, it is not possible to understand whether purpose has been achieved or if processes need to be amended, replicated or discarded.

ESTABLISHING PURPOSE

Purpose is the reason why something exists, is done or created. Purpose matters to people, organisations and communities because it can add clarity, direction and motivation. Most successful organisations and business are clear about what their purpose is and work to it[29].

Establishing what your organisation, agency, enterprise or business is trying to achieve is the first of the three integrated stages outlined above. You will need to ask questions like:

- What is the purpose of the policy, program, initiative, intervention?
- What is it you want to achieve?
- Why does it matter?
- Why are you doing what you are doing?

Without having answers to these questions, it is difficult to ensure that activity is purposeful. It is also difficult to decide what to measure, or determine whether and to what extent objectives are being achieved.

It is important to consider purpose at different levels: society, organisation, program/initiative and for different stakeholders. Purpose statements can often be found within mission statements, organisational objectives or strategies.

CONNECTING PURPOSE AND PROCESS, AND UNDERSTANDING CONTEXT

Most social purpose organisations, enterprises and agencies will be undertaking activities and have processes in place to assist them to meet those activities. In turn, each activity and/or process will be intended to achieve a particular result and to influence change. One of the most common ways to articulate the connection between purpose and process is through a theory of change.

What is a theory of change?

A theory of change is "an explicit theory or model of how a program [or policy] causes the intended or observed outcomes".[30] It presents a visual representation of how a program or initiative should work by linking inputs (the resources that go into a program), activities (what the program does), outputs (the number of people, places, supports, activities the program has produced), outcomes (what changes have occurred) and impact (long term change).

In best practice, a clearly articulated theory of change is a prerequisite to effectively measuring social outcomes. It can be used to help determine the social impact a program intends to have, why change may or may not occur and what should be measured. In principle, a theory of change should assist with:

- Articulating your goals – internally and externally – and how that goal or goals will be achieved.
- Developing a better understanding of the policy/program /intervention (including breaking down parts and interactions between these parts and certain outputs and outcomes).

'Being busy does not always mean real work. The object of all work is production or accomplishment and to either of these ends there must be forethought, system, planning, intelligence, and honest purpose ... Seeming to do is not doing.'

- Thomas A. Edison.

'I think the purpose of life is to be useful, to be responsible, to be compassionate. It is, above all to matter, to count, to stand for something, to have made some difference that you lived at all.

- Leo Rosten.

There are many guides on how to develop a theory of change and logic models. See, for example:

- W.K. Kellogg Foundation (2004), 'Logic Model Development Guide: Using Logic Models to Bring Together Planning, Evaluation, and Action', W.K. Kellogg Foundation: Michigan
- Baker and Bruner (2010), 'Participatory evaluation essentials: An updated guide for non-profit organizations and their evaluation partners', The Bruner Foundation.

- Guiding planning, design and execution of measurement.
- Formulating and prioritising meaningful measurement questions and the scope of what should or can be measured.
- Identifying intended and unintended side effects and potential risks.
- Determining program effectiveness and assisting in explaining cause and effect associations.

A theory of change will help to provide your roadmap. It will help you stick to purpose, follow process and measure performance. It can assist to guide decisions and should be a living rather than a static document – it should be tested, challenged and refined regularly.

UNDERSTANDING CONTEXT

Theories of change for particular policies, programs, initiatives or organisations, agencies, enterprises or businesses include various assumptions and are potentially influenced by a broader context – within and beyond the organisation. For example, if a program's purpose is to improve social participation of a child with a disability, the organisation's investment into the program, how it is implemented and the external influences – family, geographic and other policies and programs – will influence the extent to which the change may or may not occur.

Understanding the context, environment and stakeholders in which an intervention, program, organisation, enterprise or agency works is crucial for better measurement, evidence and impact.[31]

Complex systems thinking is a useful way to consider how and to what extent the external context might affect processes and outcomes. Complex systems are "interconnected components that work together"[32]. Complex systems occur in nature (e.g. forests and reefs) and in society (e.g. the stock market, within organisations and in communities). Each component acts independently but can significantly affect the behaviour or reaction of other components and the nature of the system as a whole. These are called feedback loops. The feedback can be intended or unintended and positive or negative.

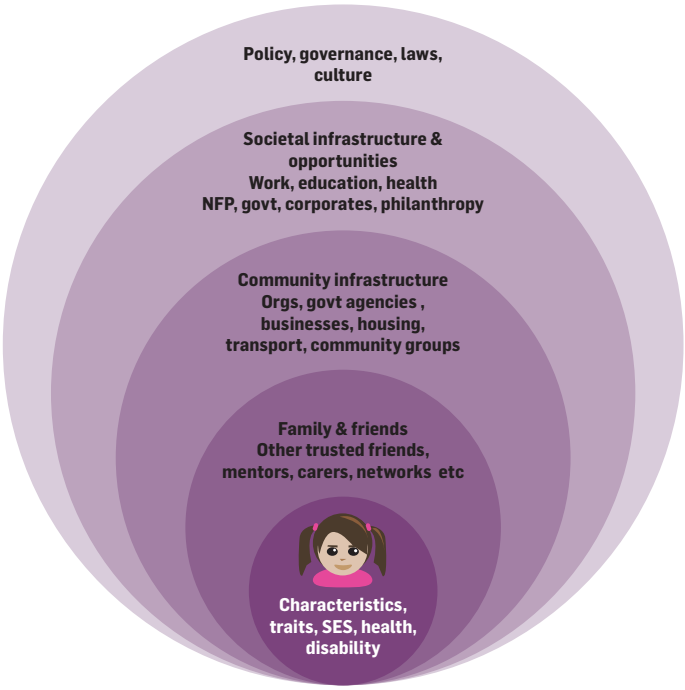
Social purpose organisations should consider the system they exist in and the system surrounding whatever it is they are trying to change. From an organisational perspective consider:

- **Governance structure:** how might governance structures, processes and implementation affect delivery and outcomes?
- **The number of organisations and partners involved:** what roles and responsibilities are different partners playing? To what extent are outcomes dependent on effective partnerships? Where and how are different roles played by different partners interdependent? What effect might this have on outcomes?
- **The number and nature of activities:** how many paths or activities exist to achieve outcomes? For example does a program have one approach to achieve an outcome for a client or multiple parallel or complementary strands? Is more than one required for success?

- **Linearity of outcomes:** is there is a clear causal pathway from activity to outcomes? Do feedback loops exist to reinforce behaviour and change?

It is also critical to consider the system you intend to change, and within which the person or group exists and that will be impacted by the change. Taking the example of changing the social outcomes of a child with a disability, we have illustrated this context below. There are multiple layers to the system in which that child lives, and each of those layers interacts with each other in many different ways.

A child with a disability and the system that the he or she may be living in



LEVELS OF COMPLEXITY IN SOLVING PROBLEMS

Using the example above, let's assume that to improve the child with a disability's social participation, one of the problems the initiative is trying to solve is access to the school playground because of a mobility restriction and steps. If the problem is that the school playground has steps and needs a ramp, this is a relatively simple problem. The relationship between cause and effect is clear: the steps are causing a lack of access so if you put in a ramp, the outcome is access to the playground. But problems can be more complicated or complex.[33]

A simple problem usually requires a standard approach and the problem will usually be addressed quickly or over time. The solution can often be replicated by others in different situations. Measuring the change that has occurred with a simple problem is also fairly straightforward.

- **A simple problem** can generally be thought of as having a linear cause and effect relationship.
- **A complicated problem** might have a linear cause and effect relationship between the problem and solution. However, there are usually multiple, interconnected components and feedback loops.
- **A complex problem** is one that has many possible interrelated cause and effect pathways. The behaviour of each part will affect other parts and the overall system. Outcomes might be intended or unintended and positive or negative.

Complicated problems will still have a linear cause and effect, but they involve more components, parts or people to be involved in addressing the problem. As such, they require high levels of skill and expertise and (often) time to achieve the solution. A general example might be getting a rocket ship to take off – the expertise level is very high, but the problem will be addressed over time with testing, refinement and improvement of how the parts intersect and interact. In the case of a child with a disability, the complicated problem might be access and inclusion in a mainstream school that is not set up for a child with a mobility impairment. Access will often involve people within the school (e.g. School principal, teachers, teacher's aide), Government Education Departments (e.g. access and inclusion workers), parents, other advocates and specialists. A series of modifications may need to be made to the physical space, resource allocation and practices. The actions of each party in this example can affect how others react and the overall outcome. The problem, however, can be solved over time and outcomes can be measured.

A complex problem – commonly known in the social purpose sector as a 'wicked problem' – is much more difficult to address. There are many interrelated possible cause and effect pathways and numerous people and parts to the system. The behaviour of one part will affect the behaviour of others and there may be intended and unintended consequences. To address complex problems a broad range of different skills, expertise and intervention types at different time points are usually required. There is an uncertainty that the problem will be resolved, measuring outcomes is also more difficult, and attribution for which group or initiative was responsible for the outcome cannot usually be accurately determined.

If we take the example of the child with a disability we can consider an example of a complex problem. Achieving improved social participation overall in this scenario not only relies on practical changes and resource investments, it is also affected by social acceptance, cultural beliefs (e.g. disability is 'hidden' within certain cultures), legislation to enforce equal access and the right to live free from discrimination, parent resources (to purchase goods and services needed beyond those accessed publicly) and access to integration supports – to outline just a few contingent factors.

Understanding whether a problem is simple, complicated or complex is important for social purpose organisations to design (innovative or otherwise) approaches, services or supports to address social challenges. It will also help to inform what outcomes should be and how they are measured.

Key navigation points

In summary, there are three steps for integrating measurement into your organisation:

- Clarify your purpose;
- Determine and articulate the process of how social impact will be achieved; and
- Measure your performance, the markers of change and the conditions of how this occurs.

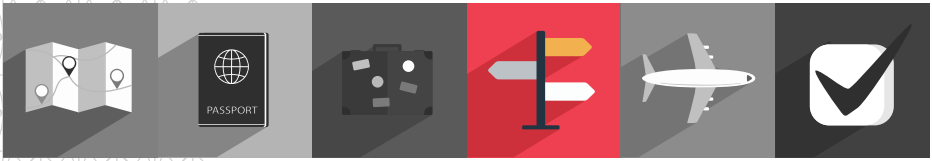
In undertaking these steps, consider the complexity of the problem and interrelated systems that will affect change.

SO WHAT?

Key questions to consider

- *What is your organisation's overarching purpose?*
- *How are you achieving your purpose? What processes and activities are in place to achieve your objectives?*
- *Can you articulate your theory of change?*
- *What types of problems are you trying to solve: simple, complicated or complex? What solutions would you like to achieve for each of these problems? What evidence is available to inform your understanding of the solution to the problem?*
- *What context are you operating in? How might systems thinking help to understand context and measure performance?*
    - » *What contextual factors – demographic, economic, social, regulatory, policy, attitudinal, cultural – might affect the outcome you're trying to achieve?*
    - » *How might the behaviour of other players in the system affect what you're doing/trying to achieve?*
    - » *How might you consider the feedback loops in your work and in what and how you measure?*
- *Are you able to communicate the complexity of the problem and your role in the solution?*
- *How might the answers to the above questions affect the scope of what it is you will endeavour to measure?*

4. CHOOSE WHAT YOU'RE GOING TO DO ON YOUR TRAVELS: WHAT TO MEASURE



In this chapter you will find your way to:

- *Setting the scope for measurement*
- *Levels of measurement*
- *Understanding stakeholder roles and needs*
- *Materiality*

WHAT IS IT YOU WANT TO GET OUT OF YOUR TRAVELS? SETTING SCOPE FOR WHAT TO MEASURE

The scope of what is measured should be determined by the key factors in Chapter 3: purpose (what you want to achieve), theory of change and context. It is also important to be clear about the purpose for measuring. This may relate to the reasons for measurement, which were outlined in Chapters 1 and 2, and the reasons may be multiple and differ depending on stakeholders.

Having a clear and articulated understanding of why you are embarking on measurement is important. It is also essential to understand the position and views of stakeholders who have a material interest in your program or intervention, such as those with a funding, governance or reporting relationship.

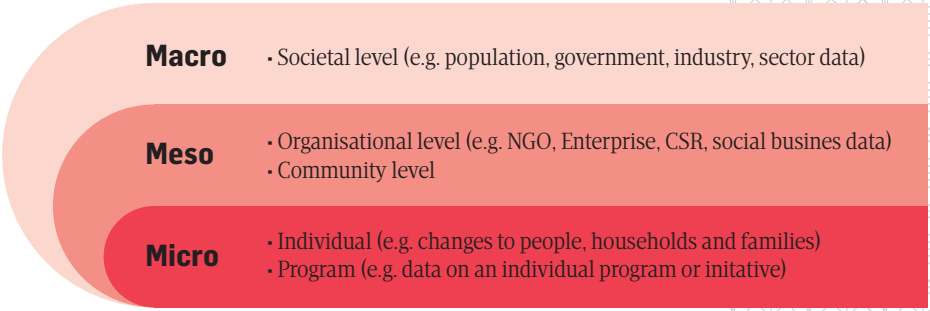
Measurement is only valuable when it will be useful and relevant. So, be clear about why you are measuring, for whom, what different stakeholder groups want from measurement and how the outcomes will be used. A clear rationale of measurement scope will help to avoid a situation where the wrong questions are answered.

There are many reasons for measuring impact and different people, groups, organisations, enterprises and their stakeholders may have different goals for measurement. Understanding what these goals are will assist to ensure that the measurement approach is fit for purpose, useable and delivers the evidence required.

HOW FAR DO YOU WANT TO TRAVEL? LEVELS OF MEASUREMENT

The theory of change you are working to will determine whether change is occurring at a micro, meso and/or macro level (refer to the image below).[34] During the measurement scoping phase, it should be decided what level of analysis is going to be included. What will be measured at an individual, program or intervention level (micro); organisational or community level (meso); and/or at a societal, sector or industry level (macro)?

Micro, meso and macro levels of change and measurement



Understanding the level of measurement can help inform which benchmarks and indicators to use and what data can and cannot be meaningfully compared.[35] It will also assist to meet different stakeholder needs and set clear expectations.

WHO ARE YOU MEETING AT YOUR DESTINATION?: STAKEHOLDERS

Stakeholders are critical in shaping whether and how an organisation's objectives are met.[36] Your stakeholders may include beneficiaries, communities, funders, donors, governments, other organisations, the media, practitioners, your team, researchers and consultants. Because of this critical role, it is important to understand stakeholders' motivations, needs, involvement and contribution in an overall policy, program or intervention and also for measurement. Measurement is not an individual venture – it involves engaging and interacting with a range of stakeholders.

The key steps for understanding the needs, involvement and contribution of stakeholders in measuring outcomes are to:

- **Be clear on who you're travelling with:** Identify all relevant stakeholders (there are many different and widely available tools to assist; see the links below).
- **Understand what role your travelling companions play:** Where do they fit into the program/ initiative/ organisation and measurement process? What do they bring? What are their needs?
- **Who is key to the journey, and what do they need to know:** Prioritise stakeholder needs and levels of engagement. Consider how important it is to include and engage different stakeholder groups in the measurement process? Prioritising stakeholder needs may assist in guiding the scope of the measurement and informing decisions of what gets included and what does not.

The table below provides a high level example of stakeholder mapping by role description, needs and priority level.

There are many freely available guides and templates for stakeholder engagement, including:

Partridge, K. (2005). From Words to Action: The Stakeholder Engagement Manual. Guide to Practitioners' Perspectives on Stakeholder Engagement. Stakeholder Research Associates Canada. Available at http://www.accountability.org/images/content/2/0/207.pdf

Krick, T., Forstater, M., Monaghan, P. & Sillanpaa, M. (2005). From Words to Action: The Stakeholder Engagement Manual. Volume 2: The Practitioner's Handbook on Stakeholder Engagement. Stakeholder Research Associates Canada. Available at http://www.accountability.org/images/content/2/0/208.pdf

Preskill, H. & Jones, N. (2009). A practical guide for engaging stakeholders in developing evaluation questions. Robert Wood Johnson Foundation. Retrieved from http://www.fsg.org/tabid/191/ArticleId/78/Default.aspx?srpush=true

Example of stakeholder mapping, role description and needs by group

Stakeholder groups	Examples of role description and contribution to measurement	Examples of needs	Example of priority level
Measurers (e.g. practitioners; researchers; evaluators; consultants)	Design and implement measurement and analyse and present the results	Resources; an understanding of needs and scope; buy-in from key stakeholders	Medium
Users (e.g. government; corporates; NGOs; enterprises; business)	Possible funders of measurement; inform design; provide data if relevant; use evidence from measurement to write policy; to inform future investment; to develop or refine initiatives	Relevance; accessible, useful, informative information; engagement	Medium-high
Beneficiaries (clients/ consumers) and communities	Inform (or may be partners in) the design and how the measurement is conducted; Primary providers of knowledge and data	Respect and trust; participation & engagement; accessible information; feedback	High
Innovators & implementers (e.g. social purpose organisations; communities)	Inform the design (may be conducting or partners in the design); data collectors; data providers and reporters	To know if they are meeting their purpose/ objectives; buy-in to the design & data collection; accessible, useful, relevant information	High
Others (e.g. partner organisations; service providers; advocacy groups; family members; etc)	Data providers; may inform the design	Engagement; accessible information; relevant feedback	Low-Medium (depending on the group)

MATERIALITY: WHAT TO INCLUDE/EXCLUDE

Drawing from the theory of change, varying levels of change and the needs of stakeholder groups, there will be many possibilities of what can be measured. Working out what to include and exclude in the scope of the measurement is important. 'Materiality'[37] focuses on what is important. Omitting to measure a material outcome is problematic and including a measure that's not useful or relevant wastes resources. For an area to be 'material', it needs to be both significant (it matters) and relevant to a stakeholder group or organisation, as outlined in the table below.

Using materiality to work out what to include/exclude from measurement

	Easy to measure outcomes	Difficult to measure outcomes
Material (significant and relevant) to a stakeholder group/ organisation	Measure	Explore how to measure
Not material (insignificant and irrelevant) to a stakeholder group/ organisation	Avoid measuring	Do not measure

Materiality relies on judgement so it is important to demonstrate a process or framework for deciding what is material and tracking the judgements or decisions you make. Having records of these decisions increases the transparency and reliability of your assessments.

Key navigation points

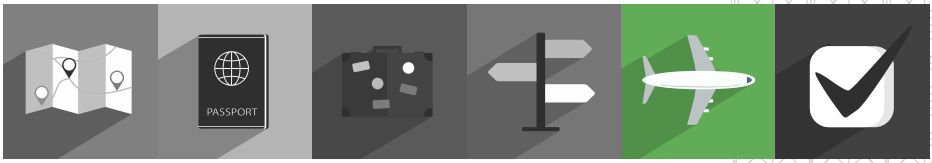
Setting your scope for measurement involves being clear about why you're measuring, at what levels you need to measure outcomes, your stakeholders and their needs and focusing on what's important. Combining this understanding with your purpose, theory of change and context (discussed in the previous chapter) will provide you with the complete picture for setting the direction and scope for measurement.

SO WHAT?

Key questions to consider

- *Why are you measuring?*
- *What is your scope for measurement?*
- *At what levels do you want to / can you measure?*
- *Who are your stakeholders? What is material to you and them in regard to what you measure? How will you prioritise what gets measured?*

5. CHOOSE YOUR MODE OF TRAVEL: HOW TO MEASURE



In this chapter you will find your way to:

- *Different ways to measure*
- *Types of evidence*
- *Benchmarking and shared measurement*
- *Practicalities and pitfalls*
- *Tools for measurement*

The primary purposes of outcomes measurement are to provide evidence of what works and what doesn't, and why and how to improve effectiveness and efficiency. There are a range of different methods and tools to measure or evaluate programs, interventions and policy. Irrespective of the approach taken, outcomes measures fundamentally rely on having quality indicators to determine change. How the indicators are used and put together will determine the type of evaluation or assessment produced.

INDICATORS

Indicators are measures that show whether progress is being made on individual outcomes or goals. They may show no, positive or negative change over time. Change might be intended or an unintended side-effect.[38]

Indicators can be qualitative or quantitative. Qualitative indicators seek to understand how the world is understood, interpreted and experienced by individuals, groups and organisations (usually through the eyes of the people being studied and in natural settings). They help to unpack the 'why' and are often richly descriptive, flexible, relative and subjective.

Quantitative indicators seek to explain something by using numerical data: how many, how much, how often. They are highly structured and based on theory/evidence and usually objective, but they can also capture subjective responses such as attitudes and feelings.

Quality indicators

There are a number of criteria for developing or identifying quality indicators. It is commonly recommended that indicators are SMART (Specific, Measurable, Attainable, Realistic, Timely)[39] or based on QQT (Quality, Quantity, Time)[40]. Overall, an indicator should:

- **Be a good 'conceptual fit':** there is evidence that the indicator specifically relates to a particular theme/outcome area/goal.
- **Be from a quality data source:** the indicator comes from a reliable source with a valid methodology.
- **Capture the essentials:** measure who, what, how much, how many and/or when.
- **Be achievable and measurable**
- **Be able to be tracked over time:** if the indicator is used at different time points, it will indicate if change has or has not occurred. Benchmarks can also be established and compared to.

To determine the extent to which an indicator is a good **'conceptual fit' and of quality**, the ABS' guides below are useful.

Levels of directness[41]

	Description
Direct measure	An indicator that measures all of the concepts reflected by the theme or element, i.e. a good conceptual 'fit' (e.g. 'Employment as a proportion of people who are in work or want to work' is a direct measure of employment opportunities).
Partial measure	An indicator that measures part of the concept reflected by the theme or element, where that part is considered significant enough to stand as an indicator for the theme or element as a whole, i.e. a partial conceptual 'fit' (e.g. 'Number of domestic trips involving nature activities' is a partial measure of access to and availability of nature areas).
Indirect measure	An indicator that measures the concept reflected by the theme or element, whilst being somewhat conceptually separate from the central idea of the theme or element, i.e. a proxy for the idea, rather than good a conceptual 'fit'(e.g. 'Life expectancy' is an indirect measure of health).

Baking a cake: an analogy for how indicators fit within different measurement approaches

Measuring or evaluating is largely made up of a number of indicators that are collected and then packaged together in a particular way to end up with a result. A good analogy is baking a cake. The ingredients are the foundation of the cake. You can't bake a cake without them. They may differ slightly between recipes, but there are usually core ingredients and the quality of the ingredients will affect the outcome. The directions of how these ingredients go together and the circumstances under which they are baked will determine the cake you produce. Following the recipe matters, as does the quality of the ingredients and a number of external factors (e.g. humidity, whether the oven temperature is correct etc). Using this analogy, the ingredients are the indicators; the approach used is the description for how the indicators are put together and the final product (the report/ findings) is the cake. The quality of the indicators is paramount to the product that you end up with. In some circumstances you might be able to rescue parts of the cake if you get the ingredients wrong, but in other circumstances the cake will be wasted and you'll need to start again.

Levels of quality[42]

	Description
High quality	The data source rates highly in terms of reliability, currency and methodology.
Acceptable quality	The data source is acceptable in terms of reliability, currency and methodology.
Limited quality	The data source is of limited quality in terms of reliability, currency and methodology.

Using existing, already validated indicators from **quality sources** can be helpful to obtain reliable indicators and population or other benchmark data. There are a number of existing indicator frameworks or banks that can be drawn on for this (see below for examples).

Examples of existing indicator banks or frameworks

Measures of Australia's Progress
Is life in Australia getting better?
http://www.abs.gov.au/ausstats/abs@.nsf/mf/1370.0

The Nest: A national plan for child and youth wellbeing
http://www.aracy.org.au/projects/the-nest

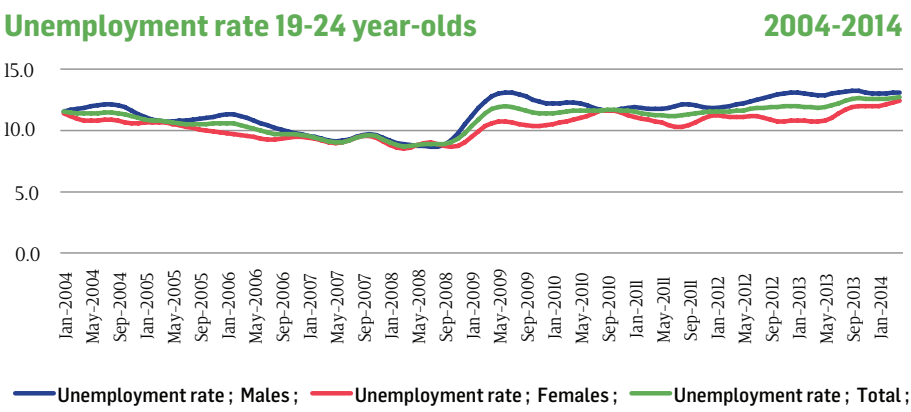
OECD Environmental Data and Indicators
http://www.oecd.org/env/indicators-modelling-outlooks/data-and-indicators.htm

OECD Better Life Initiative
Compendium of OECD well-being indicators
http://www.oecd.org/general/compendiumofoecdwell-beingindicators.htm

The ability to **measure change over time** against a starting or reference point gives indicators real value - see the chart below for reference. This is otherwise known as **benchmarking**. In selecting or developing indicators consider:

- Over what time periods do you want to measure?
- Are there existing benchmarks (e.g. population data) or do you need to establish the benchmark?
- If the second point is yes and you do need to establish a benchmark, what do you intend to compare or benchmark to (e.g. intervention groups, pre-, during and post program; other standards)?

An example of using unemployment as an indicator over time[43]



SHARED INDICATORS, SHARED OUTCOMES AND SHARED MEASUREMENT

If a common set of indicators – shared indicators – are used within and across sectors, it will not only assist in the ability to benchmark and compare against the population, but also decrease the organisational need and resources for indicator development. It also helps increase the reliability of indicators selected and used.

If common indicators are used and the outcome data is de-identified and shared, outcomes will be comparable not just at a population level by also at an organisational, group, sector and/or social issue area. These outcomes should be reported with descriptive information to contextualise target groups and client demographics (as relevant) to help aid understanding about the circumstances under which change occurs. For example, if your organisation provides housing services, you might track and report tenant housing stability and wellbeing (outcomes) along with information on the client demographics, housing type and other information about your organisation (what you do, how you work, how many people are housed etc). If similar outcome indicators are used, the housing stability and wellbeing of one group of residents could be compared to other residents in the organisation, in other organisations, in different geographic areas, across the housing provision sector, or to the broader population.

To effectively implement shared measurement you need to use shared indicators in the same way to measure the same outcomes. It involves using standardised indicators across social issues or demographic groups and (often) organisations collaborating to develop shared thinking, tools and processes to integrate into the measurement design, implementation and reporting.[44]

Shared measurement has grown in prominence following the popularity of collective impact approaches to address social issues.[45] However, even without a collective impact approach to address a social issue, sharing indicators and outcomes and consistent approaches to collect and analyse data can be very beneficial in:

- Saving time and resources to develop valid and robust indicators.
- Improving benchmarking and comparisons between organisations and against population data.
- Providing external validation.
- Improving the evidence base for addressing social issues and creating social change.[46]

Shared technology platforms will significantly aid the shared measurement process, particularly around reporting.

Shared measurement requires strong leadership from organisations to coordinate efforts and commit to sharing learning and outcomes. It also requires on-going support from stakeholders and funders to focus resources on the development, collection, analysis and disseminations of results.[47] Shared measurement requires people who do the measurement and people who use the results to think about outcomes beyond the individual organisational or individual community level.

Consider questions like:

- What are the common outcomes we are trying to achieve?
- If multiple programs are supporting the same clients, does attribution matter? Why? If yes, is it possible to reliably determine?
- How can we collaborate to measure whether we are making a difference?

While shared measurement is not easy, there are many possible benefits that organisations and stakeholders can gain from improved and comparable data. At a minimum, to help make outcomes measurement meaningful organisations and stakeholders should consider using shared indicators where they are of quality, relevance and available.

Key features of shared measurement

- *Shared indicators for shared outcome areas.*
- *Consistent methodologies.*
- *Focus on measuring outcomes and impact.*
- *Agreement around what is measured.*
- *Clarity around a sector's impact.*
- *Ability to compare.*
- *Consistent analysis.*
- *Transparent reporting.*

Adapted and expanded from NPC's Inspiring Impact: Blueprint for shared measurement (2013).

NAVIGATING COMMONLY USED METHODS OR APPROACHES TO ASSESSING OUTCOMES

Indicators are the foundation for evaluating change. How the indicators are used and analysed are the methods or approaches applied. There are many methods and approaches and each has its advantages and disadvantages and provides a different perspective. Hierarchies of evidence and rigour for different approaches are debated. For example, there are proponents of scientific methods such as randomised controlled trials, meta-analyses and quasi-experimental design and others who advocate for a broader and richer understanding of evidence that better reflects the realities of social interventions and complexities of wicked problems.[48] It is important to clarify that there is no one best approach and that consideration needs to be given to the purpose of measurement, and what information and evidence users and stakeholders require.

Methods may be applied to a group of indicators separately or may be incorporated within whole approaches to assessing change. For example, qualitative and/or quantitative methods are used in many approaches to measurement. Different methods will be required to answer different research questions and they will use different tools and techniques to collect and analyse the data – see *CSI's Decision Making Tool for Social Impact Measurement Approaches* table below.

Approaches are grouped methods. In evaluations, these are often categorised as formative approaches – to understand how a program, policy or intervention has been designed and implemented; and/or summative approaches – to understand what changes have occurred. *CSI's Decision Making Tool for Social Impact Measurement Approaches* (illustrated below) provides a list of questions mapped to which methods (qualitative and quantitative) and approaches (formative and summative) will assist to answer them. It also provides a couple of other commonly grouped approaches that exist to evaluate programs, measure outcomes and impact, such as economic analyses and integrated approaches to performance and accountability. This table aims to assist you to get a better grasp on what methods will answer what questions, but it is important to note that:

- Often multiple methods are needed to answer particular questions;
- Certain assumptions are being made (e.g. that the data is good quality and that certain data will be collected); and
- Getting answers to one question may be interdependent on other methods. For example, economic analyses rely on methods that collect data about outcomes (effectiveness) and investments in resources to achieve these outcomes (efficiency).

Qualitative methods include participant observation, interviews, focus groups, document and policy analysis, ethnography and observation, and participatory methods. Data can be analysed in many ways including thematic analysis, document and policy analysis, triangulation, network analysis, case study and narrative analysis.

Quantitative methods include: surveys, control trials, cohort studies, experimental design studies and analysis of datasets. Data can be analysed through descriptive statistics, econometrics and modelling. Data is analysed using statistical methods, mathematical modelling and predictions.

CSI'S DECISION MAKING TOOL FOR SOCIAL IMPACT MEASUREMENT APPROACHES[49]

Area	Do you want to answer the following questions about a policy/program/intervention?
Design and implementation	How effectively was it implemented?
	How does it work?
	How was it implemented?
	Was it implemented as intended?
	Is it meeting needs?
	Are changes required to improve the performance or efficacy?
	How efficient was it?
	What difference did the implementation make to outcomes?
	What elements are important for replication?
Outcomes	What outcomes have been achieved?
	Did it achieve what it set out to do?
	Was it effective?
	What impact did it have?
	How and why did the outcomes occur?
Implementation	Were the intended activities/ events and other outputs achieved?
Target group	Did you reach your target audience?
	Why did you/didn't you reach your target audience?
	Do you want to know who the program worked for and under what circumstances?
Outputs	What outputs were achieved?
	How much, how many, how often did x,y,z happen?
Comparisons	How does this intervention compare to another program/ policy that aims to achieve similar outcomes?
	How do the outcomes compare to people who were not exposed to the intervention (control group / counterfactual)?
Economics	What is the economic case for the policy/program activity?
	What is the $ value of all the outcomes? (NB only possible if outcomes can be monetised)
	What is the $ value of one or more outcomes?
	What is the $ value of the economic & social outcomes? (NB only possible if outcomes can be monetised)
	What is the total cost of the program?
	What is the ratio of the net benefit (total outcomes/ total cost)?
	What is the ratio of a specific outcome(s) / cost per unit?
Indicators, benchmarking & time	How do the outcomes compare to a standard (from existing indicator)?
	How do outcomes change over time?
	Why have outcomes changed over time?
	How do changes compare to other interventions/sectors/areas etc?
Stakeholders	Have the different stakeholders played the role they were intended to play?
	How have different priorities of stakeholders influenced program design or implementation or outcomes?
	What unintended consequences have occurred?

	Formative evaluation	Summative evaluation	Quant methods	Qual methods	Assessing costs compared to outcomes			Integrating performance, results and accountability
	How program/ policy intervention work	Outcomes	Surveys; indicators; admin data etc	Interviews; focus groups; doc analysis etc	Cost effectiveness analysis	Cost benefit analysis	Rate of return (e.g. SROI)	Results Based Accountability
	●		●	●				
	●			●				
	●			●				
	●		●	●				●
	●		●	●				
	●		●	●	●	●	●	
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There are many approaches to measurement and *The Compass* was not intended to cover most of them. For the ones that are covered, we do not intend to provide a detailed technical description of each approach. Rather the summary below aims to provide a guide to what some of the approaches will provide, the conditions required to use these approaches and potential advantages and limitations.

Grouped approaches range from those that aim to conceptualise programs and guide evaluations, such as Theory-driven evaluation approaches, logic models and program logic, others that integrate organisational performance and accountability such as Results Based Accountability, Integrated Reporting and Social Accounting and Audit, or those acting as an extension of existing methods for specific or technical analysis, such as comparing costs to outcomes in economic analyses such as Cost Benefit Analysis and Cost Effectiveness Analysis, or rate of return approaches like Social Return on Investment.

Approaches	Methods	What
Theory driven evaluations	• Theory-driven evaluations o Logic models o Programme logic o Log frames	Conceptualisation of how a program works Guide evaluation based on the conceptualisation
Integrated performance and accountability	Results Based Accountability	Approach for systematically measuring outcomes overtime
	Integrated Reporting	A process for developing an annual report that incorporates different types of economic, social and environmental value
	Social Accounting and Audit	Performance measures on financial, social, community and/or environmental outcomes
Assessing costs compared to outcomes	• Cost Benefit Analysis • Cost Effectiveness Analysis	Approaches to compare costs to outcomes in natural and monetary units, across organisations, programs or initiatives
	• Social Return on Investment	Ratio of costs to the social, environmental and economic benefits generated

CONCEPTUALISATION AND IMPLEMENTATION

Theory-driven approaches such as logic models, program logics and log frames aim to explain how and why a program or intervention works (or does not work) and uses this theory to guide a deeper measurement process. They are based on an "explicit theory or method of how the program causes the intended or observed outcomes and an evaluation that is at least partly guided by this model".[50]

These approaches can explain how a program works by presenting the relationships between:

- Inputs: the resources that go into a program.
- Activities: what the program does.
- Outputs: the number of people, places, supports, activities the program has produced.
- Outcomes: what changes have occurred.
- Impact: long term change.

To develop a program theory can require extensive stakeholder engagement, document analysis, and review of existing evidence on similar programs or the social issue or problem being addressed.[51] A sound theory requires formulation and

rigorous testing of hypotheses. Once developed, this theory can be used to guide the objectives, evaluation plan, the development of indicators, data collection and reports.

There are limitations when using this approach: firstly, to develop a sound theory requires resources and time to conduct extensive stakeholder engagement and background review; secondly, if a program or intervention is poorly conceptualised or untested, using this to guide the rest of the evaluation or development of measures or indicators can lead to a poor framework; lastly, like many frameworks, a theory driven evaluation needs to be used in conjunction with other methods.

INTEGRATION OF PERFORMANCE AND ACCOUNTABILITY

There are a number of approaches for integrating performance and accountability into an organisation. For outcomes and impact measurement contemporary approaches include examples like Results Based Accountability, Integrated Reporting and Social Accounting and Audit.

Results Based Accountability (RBA):

A key feature of the RBA methodology is the continual tracking of performance at the macro level (population accountability) and micro (organisational/'performance' accountability) levels. This involves developing and integrating outcomes throughout a program, rather than ad-hoc surveys for evaluations, and focus on developing a method to collect data overtime from clients and stakeholders.[52]

Integrated Reporting:

Developed by The International Integrated Reporting Council (IIRC), Integrated Reporting provides a conceptual framework for the preparation of a concise, user-oriented "Integrated Report". This demonstrates the linkages between an organization's strategy, governance and financial performance and the social, environmental and economic context within which organisations operate. While originally developed for large corporations this provides a useful framework for social value organisations because of its emphasis on outcomes.[53]

Social Accounting and Audit (SAA):

The SAA approach emphasises accountability and international process improvement, establishing a framework for ongoing monitoring, evaluation and accountability to stakeholders, both internal and external.[54]

The biggest advantage of all of these approaches is that they are integrated into day-to-day strategy and operations, rather than being standalone evaluations or measurement tools. The biggest limitation, however, is that they still require other approaches to determine what and how to measure change.

COSTS COMPARED TO OUTCOMES

Economic analyses and rate of return approaches provide comparative perspectives on the relative performance or efficiency of a program, policy or organisation.[55] These approaches provide different gauges of how to assess the cost and benefits of a program over different time periods to different stakeholder groups.

Economic analyses, such as **Cost–benefit** and **Cost–effectiveness** analysis (see Appendix A), involve the systematic assessment of the costs and benefits associated with a particular program to evaluate the program's overall performance. Economic analyses can incorporate monetary, qualitative and quantitative elements and can be conducted throughout a program's life cycle as either part of a formative of summative assessment. In the same way Rate of Return approaches, such as **Social Return on Investment**, aim to quantify, in monetary terms, the economic, social and environmental costs of a program compared to their outcomes.

These approaches provide useful measures to compare programs. In practice these should be seen as extensions of other evaluation methods as they rely on strong underlying outcomes and cost data.

OTHER PRACTICAL CONSIDERATIONS

Skills and competencies

It is generally agreed that a broad range of skills, competencies and experience are required for measurement. Ensuring you have the right skills within your organisation or who you engage with outside your organisation is important for reliable measurement. By developing or drawing on effective skills and competencies, organisations and practitioners could improve legitimacy, quality, rigor, reliability and use of outcomes measurement.[56]

For meaningful measurement all actors/users (e.g. providers, practitioners, consultants, researchers, employers, funders, governments, users) need to be aware of what skills are needed, who is bringing what to the table and reflecting on and filling gaps. We have adapted five skill groups that are relevant for outcomes measurement and indicated how these are relevant (see the table below).

Skills and competences adapted from Stevahn et al. (2005) with author's ideas

Skills and competencies	Description
Technical	These are predominantly hard skills required for: effective design of methods, implementation, data collection and analysis, interpretation and reporting. This could include qualitative and quantitative methodologies.
Situational analysis	The skills required to understand, analyse and address the contextual and situational (political, economic, social and regulatory) issues around measurement.
Project management	The hard and soft skills required to manage a measurement project to completion. These could include: managing the measurement process, negotiating contracts, budgeting, identifying and coordinating needed resources, conducting the evaluation in a timely manner
Interpersonal competencies	The interpersonal skills and emotional intelligence such as people skills, written and oral communication, negotiation, emotional intelligence and cross cultural understanding.
Professional practices	The behaviour, norms and values that are foundational for evaluation practice, such as standards and ethics.

Ethics

Ethics and values (trust, respect, responsibility, fairness, caring and citizenship [57]) are equally important in measurement. For example measurement involves engaging, interacting and making decisions that affect a wide range of different stakeholders, including users and communities (often from disadvantaged groups), so it is important to consider how measurement affects those groups, what the potential effects might be and what steps can be taken to ensure respect and dignity of those involved is upheld.

In Australia there are a number of organisations and governing bodies that provide standards and codes of conduct to guide researchers and practitioners in how to engage with participants, manage data collection, and advise on decision making, for example the NHMRC's National Statement on Ethical Conduct in Human Research states: "The purpose of this National Statement is to promote ethically good human research. Fulfilment of this purpose requires that participants be accorded the respect and protection that is due to them. It also involves the fostering of research that is of benefit to the community."[58]

The key responsibilities include honesty and integrity, respect for research participants, good stewardship of resources, acknowledgement of the role of others and responsible communication of results. Having a common and shared understanding of agreed values to work through these can create the norms and standards for improved measurement.

Establishing ethics, values and expected behaviour up front can help to alleviate potential risks and pitfalls associated with measurement and engaging vulnerable groups.

PITFALLS

There are many different issues to consider in the design, conduct, analysis and reporting of findings. Given this, it is important to be aware of and try to identify what risks might occur and how to deal with them.

The table below summarises issues and pitfalls that can arise during the different measurement stages.

Stage	Potential pitfalls and problems
Design	• Evaluating / measuring impact without being clear about why • Not mapping the why of measurement to the what and how • Adopting a specific software or social impact measurement tool/ approach, that might be popular/ look good but may not meet your purpose or goal (e.g. using a rate of return on programs that cost more to implement than their return) • A failure to undertake or clearly articulate a theory of change (which can lead to measuring the wrong thing) • Collecting data because it is available or easy to get, rather than it being useful
Analysis	• Combining indirect proxy data with direct data • Using non-evidence based proxies to apply a dollar value • Comparing data that is not comparable • Mixing up program expenditure and budgeted data • Comparing outcomes based on the intention of shared measurement, but using different questions/ methods • Comparing outcomes/ cost benefit ratios for programs with very different population groups and context • Failing to analyse silences in qualitative data: what's not being said? • Claiming more than is or can be known with statistical data or using the wrong statistical analysis
Timing	• Starting measurement too late (missing baselines); • Finishing measurement too early (missing the impact); • Misaligning timeframes to purposes that compromise program or evaluation rigour • Already having evidence for the change from other sources, but not using it/or aware of it
Ethics & independence	• (Accidental) identification and disclosure of individuals or groups • Lack of (or compromise of) independence of the assessment – actual, perceived, potential coercion or conflicts of interest • Failure to respect dignity and rights of individuals (especially vulnerable)
Attribution	• Claiming attribution when it cannot be claimed (social problems are often complex & require long timeframes to address, so it can be very difficult and sometimes not possible to measure & attribute impact) • Making unsupported assumptions about attribution • Attributing impact to something that has already occurred • Failing to recognise other policies or programs that might be having an influence
Reporting	• Losing sight of / or changing the goal posts during the assessment • Comparing outcomes without considering context – e.g. funding those with a high rate of return, but who are supporting the 'easiest' client group • A lack of sharing failures / lessons • Duplication of programs because of lack of availability of findings

Key navigation points

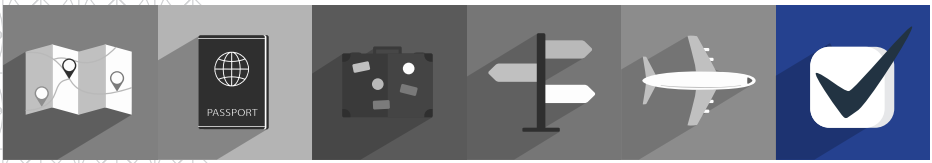
You can design and undertake effective measurement and circumvent or alleviate many of the problems and pitfalls by being clear about what evidence you need and why, identifying if validated and tested indicators and comparable benchmarks exist, over what time you want to measure change, and if these will provide you with the right answers to your questions. Having a sound understanding of indicators, different approaches and methods for measurement and the skills needed will help to increase the rigour of measuring outcomes and impact over time.

SO WHAT?

Key questions to consider

- *What type of evidence do you need? Qualitative, quantitative or a mix?*
- *What are the questions you are trying to answer? What methods will best fit to answer these questions?*
- *Will you be using pre-existing indicators or developing your own? Are the indicators of sufficient quality and directness?*
- *Over what time periods do you need to measure change? Can the indicators track changes over time?*
- *Are there existing benchmarks or do you need to establish a benchmark?*
- *Are there shared indicators from good quality sources already available?*
- *Are you collaborating or working alongside other organisations? What are the shared outcomes you are trying to achieve? What indicators will you share to ensure you are measuring change in the same way?*
- *If multiple programs are supporting the same clients, does attribution matter? Why? If yes, is it possible to reliably determine?*
- *How can you collaborate to measure whether you are making a difference in an outcome area?*
- *What methods or approaches to measurement are most relevant for answering your questions?*
- *Do you know what measurement skills you need? What skills exist within your organisation? What skills do you need from outside your organisation?*
- *What resources within your network of stakeholders can support and foster measurement?*
- *Are you aware of the common pitfalls for measurement? How might you mitigate or address these?*

6. THE CHECKLIST



In this chapter you will find your way to:

- *A checklist on whether you're 'outcomes measurement ready'*

ARE YOU OUTCOMES MEASUREMENT READY?

Undertaking measurement requires a considerable commitment and investment. To understand if you, or your organisation are ready to begin measuring your social outcomes, we have provided a checklist for you. Professor Jo Barraket, from the Centre for Social Impact at Swinburne University of Technology, suggests that the importance of 'social impact measurement readiness' is essential to add value to the process and to alleviate potential pitfalls and problems further down the path[59]. The questions cover the foundations outlined in the previous sections.

Why	Why are you/ should you measure your social outcomes?	✓
Purpose	What is your organisation's overarching purpose?	
	How are you achieving your purpose? What processes and activities are in place to achieve your objectives?	
	Do you have a clearly articulated theory of change?	
	Is your theory of change sound, up-to-date and evidence based? Has it been tested?	
	What context are you operating in (economic, social, regulatory, policy, attitudinal and cultural factors)?	
	What types of problems are you trying to solve: simple, complicated or complex?	
	Are you able to communicate the complexity of the problem and your role in the solution?	
What to measure	At what level do you want to measure outcomes?	
	What data do you require or have access to?	
	Are meaningful benchmarks and indicators available?	
	Do you know who your stakeholders are?	
	What role do they play in your organisation?	
	Do you know if they have different priorities? Are these priorities important? How will you address and coordinate these?	
	Do you have a consistent approach for deciding what to include and exclude from measurement?	
How to measure	What are the questions you are trying to answer?	
	What type of evidence do you need? Qualitative, quantitative or a mix?	
	Can you use pre-existing indicators or will you develop your own?	
	Are the indicators of sufficient quality and directness?	
	Over what time periods do you need to measure change?	
	Are there existing benchmarks or do you need to establish a benchmark?	
	Are there shared indicators available?	
	Are you collaborating or working alongside other organisations?	
	What are the shared or common outcomes you are trying to achieve?	
	If multiple programs are supporting the same clients, does attribution matter? Why? If yes, is it possible to reliably determine?	
	How can you collaborate to measure whether we are making a difference?	
	What groups of approaches are relevant for answering your questions?	
	Do you know what skills exist within your organisation?	
	Do you know what skills are required for different approaches?	
	What resources within your network of stakeholders can support and foster measurement?	
	Are you aware of the common pitfalls for measurement?	

If you are unable to put a ✓ next to these questions, then you and your organisation might not be ready for social outcomes measurement. We recommend that you work through the section and questions in the earlier chapters.

If you did put a ✓ next to many of these questions – then you're good to go. Enjoy your journey!

APPENDICES

APPENDIX A: TRANSLATOR – THE LANGUAGE OF MEASUREMENT

Accountability: Responsibility for effective and efficient performance.[60]

Activity: The processes or actions that produce the desired outputs and ultimately outcomes. In essence, activities describe "what we do".[61]

Baseline: The initial information collected about the condition or performance of subjects prior to the implementation of an intervention or program, against which progress can be compared at strategic points during and at completion of the program.[62]

Benchmarking: A benchmark (noun): A standard or point of reference against which things may be compared

To benchmark (verb): Evaluate (something) in comparison to a standard

Cost-benefit analysis (CBA): A CBA measures the benefits (tangible and intangible) and costs of a program (direct and indirect). These costs and benefits are all translated into a financial value. There are several technical stages for calculating a CBA which are not detailed here. A fictional example of a CBA output is presented below.

	Program A	Program B	Program C
Benefits (a)	$2,300	$950	$2,800
Costs (a)	$1,700	$800	$3,200
Net benefit (a) – (b)	$600	$150	-$400
Ratio (a)/(b)	1.35	1.19	0.875

Cost-effectiveness analysis (CEA): A CEA compares the costs of different types of interventions to produce similar effects or outcomes. It measures and compares their effects (tangible and intangible) and costs (direct and indirect). The effects or outcomes are expressed in natural units for comparison but not all of them are monetised. For example; $1,000 in costs to improve the average reading scores or per quality adjusted life year (health).[63]

Developmental Evaluation: Evaluation processes and activities that support program, project, product, personnel and/ or organizational development (usually the latter). The evaluator is part of a team whose members collaborate to conceptualize, design, and test new approaches in a long-term, on-going process of continuous improvement, adaptation, and intentional change. The evaluator's primary function in the team is to interpret team discussions with evaluative data and logic, and to facilitate data-based decision-making in the developmental process.[64]

Economic Analysis: A systematic approach to determining the optimum use of resources, involving comparison of two or more alternatives in achieving a specific objective under the given assumptions and constraints.[65]

Effectiveness: The extent to which an intervention attains its major relevant objectives / results.[66]

Efficacy: The ability to produce a desired or intended result.[67]

Efficiency: A measure of how economically resources/inputs (funds, expertise, time etc.) are used to achieve results.[68]

Evaluation: Systematic inquiry to inform decision-making and improve programs. Systematic implies that the evaluation asks critical questions, collects appropriate information, and analyses and interprets the information for a specific use and purpose.[69]

Impact: The longer-term social, economic, and/or environmental outcomes (effects or consequences) of a program. They may be positive, negative or neutral; intended or unintended.[70]

Indicator: Indicators are measurable markers that show whether progress is being made on a certain condition or circumstance. Different indicators will be needed to determine how much progress has been made toward a particular goal, output, or outcome.[71]

Inputs: Resources put into a program for its establishment and implementation. Examples are money, staff, time, facilities, equipment, etc.[72]

Logic model: A visual representation of how your program works – a "picture" of your program. A Logic Model includes what you put into your program (resources), what you do (activities), and what you plan to achieve (outputs and outcomes).[73]

Measure: In this guide we define 'to measure' as "assess[ing] the importance, effect or value of (something)".[74]

Outcome: An outcome can be both the results/ effects expected by implementing a program/ initiative/ strategy and the changes that occur in attitudes, values, behaviours or conditions. Changes can be immediate, intermediate or long-term.[75]

Outputs: The direct products or services resulting from your program or interventions' activities.[76] For example, the number of people, places, supports or activities your program has produced.

Proxy: Something or someone used to represent something or someone else (usually a person or a value). In economic analyses, such as an SROI, it is an estimation of a financial value where it is not possible to know the exact value .[77]

Qualitative data: Seeks to understand how the world is understood, interpreted and experienced by individuals, groups and organisations (usually through the eyes of people being studied and in natural settings). It unpack the 'why', is often richly description, flexible, relative and subjective. Qualitative data is usually text or narrative.

Quantitative data: Seeks to explain something by using numerical data: how many, much, often; change etc. They are highly structured and based on theory/evidence and usually objective, but can also capture subjective responses (e.g. attitudes, feelings etc.). They provide findings that can often be generalised and are conducted in artificial settings.

Rationale: A set of reasons or a logical basis for a course of action or belief.[78]

Results Based Accountability: A methodology for thinking about, planning and evaluating outcomes and performance for community sector organisations. The RBA framework starts with the end point by defining success in measureable terms identifying an indicator to gauge success or failure, collecting and sharing that data using results for making decisions. Within the framework outcomes are measured using three key questions – How much did we do? How well did we do it? Is anyone better off?[79]

Stakeholders: Any group or individual who can affect, or is affected by, an organisation or its activities. Also, any individual or group that can help define value propositions for the organisation.[80]

Social Accounting and Audit: Social Accounting is a process that enables organisations to measure their social and environmental performances against their aims and objectives and gauge the true impact of the organisations' activities upon its stakeholders.[81]

Social audit: Social auditing takes place when organisations' activities are audited by an independent auditor or social accounting panel.[82]

Social Return on Investment: SROI is an approach to assign a monetary value to the social, economic and environmental outcomes created by an activity or an organisation. It is based on a set of principles that are applied within a framework.[83]

Social value: Refers to social, non-financial impacts of programmes, organisations and interventions, including for example the wellbeing of individuals and communities, social capital and the environment.[84]

Validity: The extent to which a measure of a particular construct/concept actually measures what it purports to measure; how well a test actually measures what it is supposed to measure.

APPENDIX B: TIPS AND TRICKS – TECHNIQUES & APPROACHES FOR MEASUREMENT

Group	Methods	What	Common methods	Outputs
Theory driven evaluation	Logic Models Programme logic Log frames	Can be used to explain how a program works by presenting the relationships between; inputs; activities; outputs; outcomes; impact. The approach can also be used to inform or test how a program works. Two key stages: a conceptualisation of a program theory; evaluation and measurement guided by the program theory.	Qualitative: observation, interviews, focus groups, policy and/or document analysis Quantitative: e.g. surveys, administrative datasets	Visual representation of how a program should work; hypothesis for testing; explanation of the intended outcomes and indicators to measure. Can be used to inform a theory of change.
Economic analyses	Cost-benefit analysis	CBA provides a ratio that compares the costs of a program or intervention to the financial value of its benefits. Ratios should be able to be compared between different programs or interventions	Policy and/or document analysis Quantitative surveys	Ratio of costs and benefits in monetary terms
	Cost-effectiveness analysis	CEA assesses the costs of at least two programs or interventions to achieve the same effects. Not all effects need to be monetized, but the same measurement should be used to compare the effects of different programs or interventions.		Total cost compared to outcomes
	Social Return on Investment (SROI)	SROI assesses how much value is created or destroyed by a program or intervention and for whom. It includes three types of return which can be expressed qualitatively or quantitatively, however, there is a strong emphasis on quantification and monetization[85]: • Economic: financial returns • Socio-economic: saving of the state • Social returns: less-tangible effects	Observation, interviews, focus groups Policy and/or document analysis Quantitative surveys	Ratio of costs to the social, environmental and economic benefits generated
Integration	Results Based Accountability (RBA)	RBA assesses progress towards a population and/or performance goal and allows for continuous improvement	Quantitative surveys	Key performance measures and indicators
	Social Accounting and Audit (SAA)	SAA establishes a framework for ongoing monitoring, evaluation and accountability to stakeholders (internal and external) based on a triple bottom line accountability: social, environmental and economic.[88]	Observation, interviews, focus groups Policy and/or document analysis Quantitative surveys	Performance measures on a financial, social, community and/or environmental outcomes

	Requirements	Limitations	More information
	The start point depends on whether a program has a sound program theory or not. If one is not available then one must be developed and tested. Requires stakeholder engagement and consultation; background document review; workshops to develop and test the program theory.	The long term success of a theory driven evaluation relies on a sound or valid program theory being developed. If a program is poorly conceptualised this can lead to the development of poor indicators/ measures. A theory driven evaluation requires on-going outcomes and activity data.	W.K. Kellogg Foundation (2004), 'Logic Model Development Guide: Using Logic Models to Bring Together Planning, Evaluation, and Action', W.K. Kellogg Foundation: Michigan Baker and Bruner (2010), 'Participatory evaluation essentials: An updated guide for non-profit organizations and their evaluation partners', The Bruner Foundation.
	Resources and access to technical skills. Valid and high quality financial (cost) and outcomes data. Knowledge of a programs effect (RCT or quasi experiment evidence).	Highly technical process that requires specific skills and experience Often dependent on untested assumptions Users might not understand the different perspectives or how to interpret the output of the analysis Requires valid outcomes data	Commonwealth of Australia. (2006). Introduction to Cost-Benefit Analysis and Alternative Evaluation Methodologies.
	Resources and access to technical skills. Valid and high quality financial (cost) and outcomes data.		
	Stakeholder engagement, logic model, quality indicators and proxies	Requires outcomes indicators to assess how things have changed – this requires resources and longitudinal data.[86] Cannot compare between SROI assessments due to: lack of standardisation, different methodologies and assumptions. Reliant on assumptions, proxies and materiality assessments.[87]	http://www.thesroinetwork.org/.
	Development of quality indicators and measures Software platform, RBA, or otherwise to collect and generate reports	Does not inform how a program works Reliant on data collection process	More information on results based accountability is available at: http://raguide.org/
	Quality indicators and measures for social and environmental outcomes; if these do not exist new data needs to be collected Stakeholder engagement	Resource intensive Requires engagement of multiple internal and external stakeholders Reliant on pre-existing financial and outcomes data	The Social Audit Network provides further readings and a SAA manual available at http://www.socialauditnetwork.org.uk/

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