



# Welcome!

**An introduction to understanding  
and quantifying your social impact**

Please settle in and we'll be kicking off shortly ...



# Welcome from the Benefact Group

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Our common purpose is to **give** all available profits **to good causes**



\*DSC – The guide to UK Company Giving 2023-24



- Investment management
- Specialist insurance
- Broking & advisory

## How we give – the Benefact Group



1. **Small donations** to charities doing every possible kind of good
2. **Larger grants** to charities doing amazing work really important to our customers and communities
3. **Charity support** enabling charities to be more successful and sustainable

Visit [www.movementforgood.com](http://www.movementforgood.com)  
today to nominate





## **An introduction to understanding and quantifying your social impact**

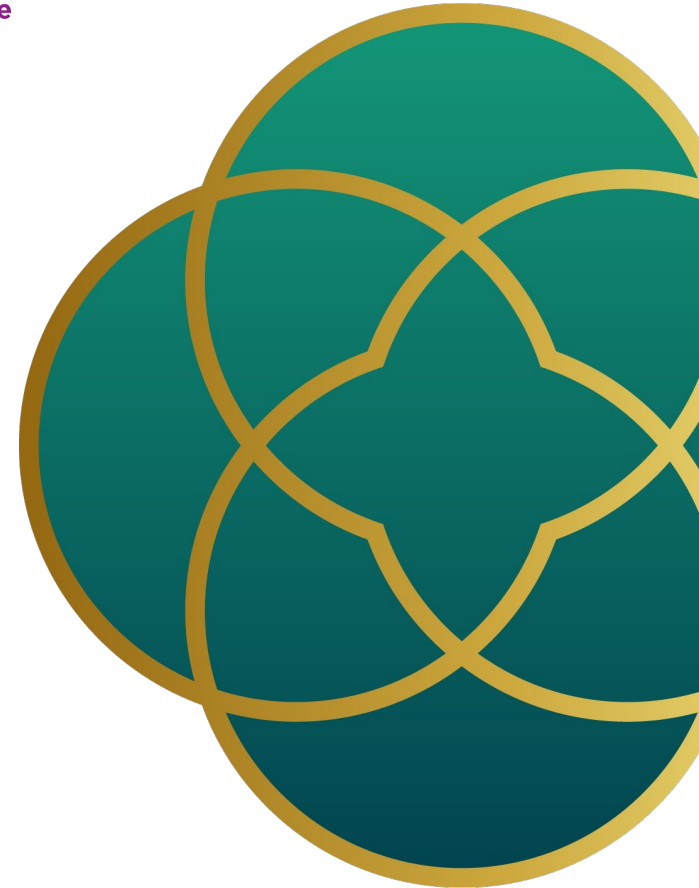
Robert Foster

Co-founder, Senior consultant and lead trainer

Red Ochre

[robert@redochoire.org.uk](mailto:robert@redochoire.org.uk)

November 2023



## Follow-up from this session

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



### **The SIM Handbook**

West Sussex County Council's  
guide to social impact measurement



## A quick note on pacing

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- Zoom fatigue syndrome and pacing
- Soft recess
- AMA
- A couple of quick assumptions before we get started



## Agenda and running order

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- A brief introduction to the vocabulary and theory of social impact
- The difference between impact measurement, impact management, and monitoring and reporting
- A meta process to plan your impact, measure, evaluate and manage your impact
- A brief summary of alternative methods and tools

## Why is your impact important?

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

A word cloud of impact-related terms. The words are arranged in a cluster, with 'Quality' at the top, 'Efficiency' in the middle, and 'Impact' at the bottom. Other words include 'Volunteers', 'Media', 'Effectiveness', 'Proof', 'Value', 'Results', and 'Awareness'. The words are in various sizes and orientations, with 'Quality' and 'Efficiency' being the largest.

Quality  
Efficiency  
Volunteers  
Media  
Effectiveness  
Proof  
Value  
Results  
Impact  
Awareness



## What is social impact?

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- Impact
  - The positive change an organisation makes (or *plans to make*) for people, society, economy or environment
- Measurement
  - Recording data – what, how and where, when and how often
- Evaluation
  - Anything that helps you to better understand the impact your organisation is having
- Management
  - Using what you've learned to make your work more efficient or more effective



## The vocabulary of impact

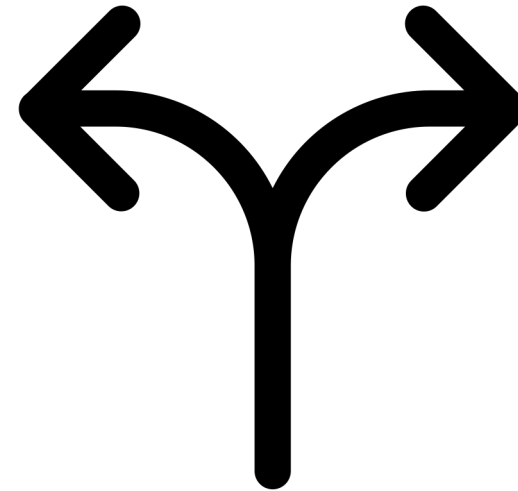
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- Outputs
  - Immediate or very short-term changes
  - Tend to be quantitative or objective, that is easy to count
  - Tend to be relatively big numbers, and often prove the scale of our work
- Outcomes
  - Sort to medium term changes
  - What happens as a result of our outputs
  - Can be a mix of quantitative and qualitative, subjective or relative measures
  - Tend to be smaller numbers, but give more flavour to the depth of our work
- Impact
  - Much longer-term
  - What happens as a result of our outcomes
  - Balances what changes can be attributed to our activity and to what changes we have contributed

## The vocabulary of impact (2)

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- Summative
  - Looking back and summarising what has happened
- Formative
  - Looking forward and forecasting what might happen
- Longitudinal
  - Over a long period of time



## Some caveats

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### 1. Social impact ≠ Social Value (necessarily)

- Public Service (Social Value) Act 2012
- All public bodies in England and Wales are required to *consider* how the services they commission and procure might improve the economic, social and environmental well-being of the area
- In this context social value can be (mis)interpreted as added financial value

### 2. Measurement

- What gets measured gets managed
- Contributes to strategic focus and better use of limited resources

### 3. Management

- Not everything that can be measured should be measured
- Extra data can contribute to spurious information and increased management overheads

### 4. Codesign and coproduction

- Codesign is working with people to codesign a more realistic understanding of the problem and possible solutions
- Coproduction is working with people to bring about a change
- You can't have lasting impact without these behaviours

## Hypotheses & Theory of Change

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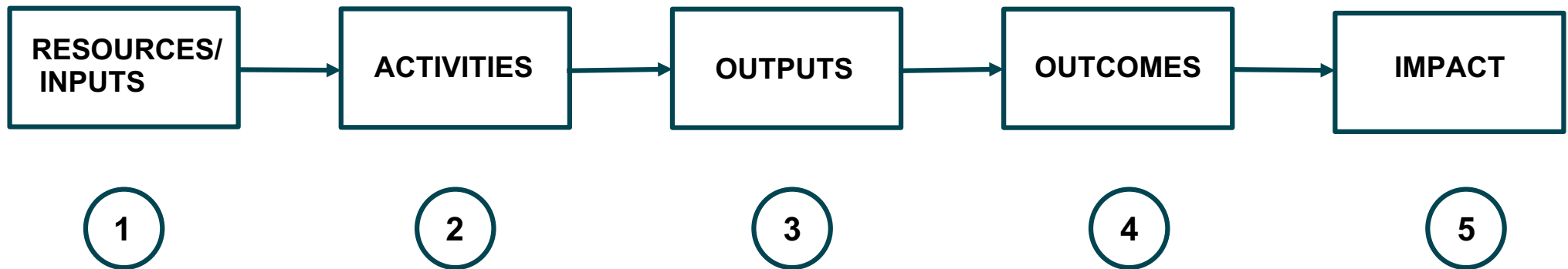
but ...



## The standard model

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The parent of all impact models (Kellogg Model)  
Used in its original form by many  
DFID LogFrames  
BIG  
Social Cost Benefit Analysis  
Basis for Social Return on Investment  
Impact mapping, etc.



## Now you're experts ... a quick exercise

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- Are they outputs or outcomes? Are they well-formed?
- What do you suggest to improve this report?

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

## Formal & informal approaches

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Robust and large data studies (quantitative) give your theory of change credibility

Stories about people (qualitative) touch the humanity of your funders, the media and your stakeholders

- **Lives touched, a type of personalised case study of your impact on a person**
- **Story telling, but *“anecdote” is not the plural of datum!***
- **Look back move forward**



## ...Look back, move forward

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What went well?  
Item #1

What went well?  
Item #2

What will you do next time?

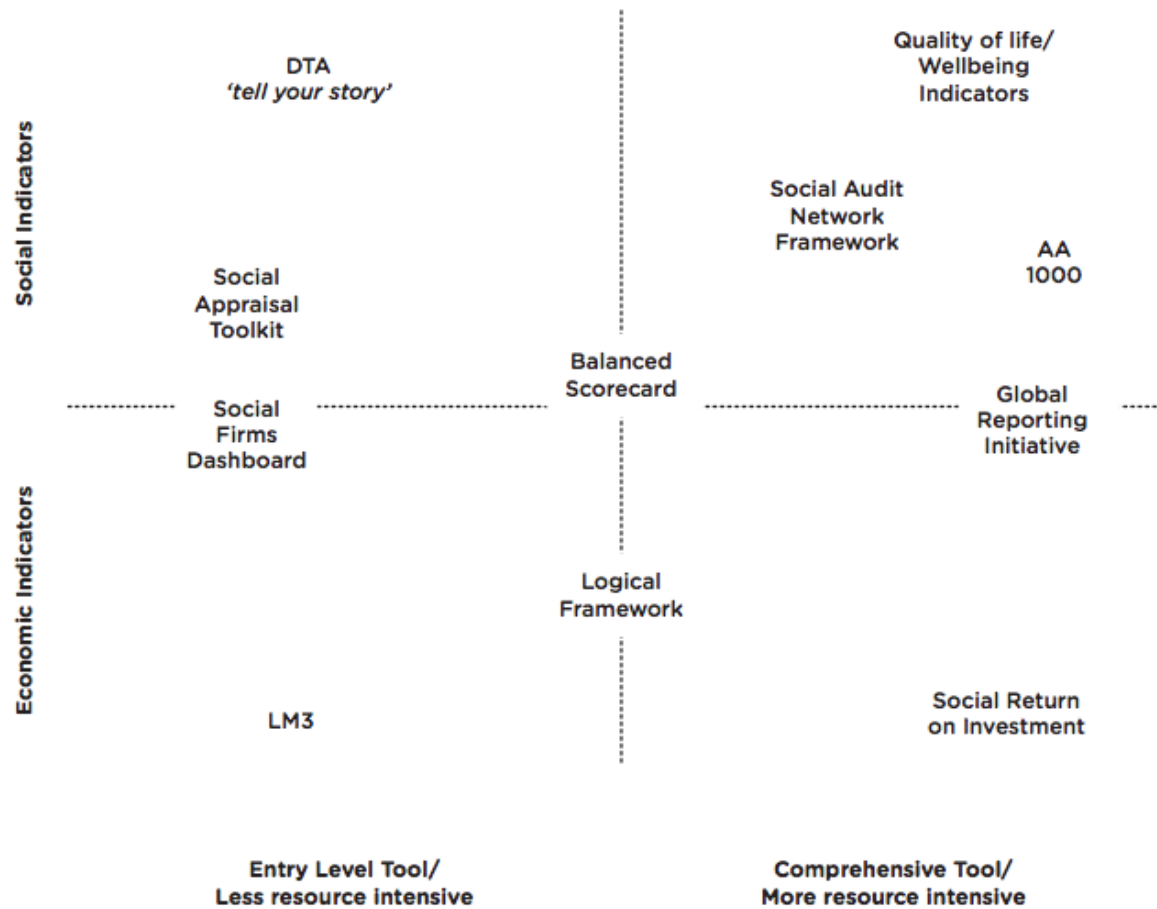


What will you do next time?

What could have been done better?

What will you do next time?

## Some other approaches



Source: Angier Griffin: originally developed for Pentagon Partnership

## A simple case study

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### Equine Therapy: Do Horses Help Your Mental Health?

November 8, 2022 / Holistic Therapy, Mental Health, Mental Health Treatment

In the world of mental health treatment, there are many unique ways to heal, among them equine therapy. But how does hanging out with horses help your mental health? A famous quote, commonly attributed to Winston Churchill and often repeated by horse lovers, says, "There is something about the outside of a horse that is good for the inside of a man." Any person who's spent time with these

## Four steps to impact success

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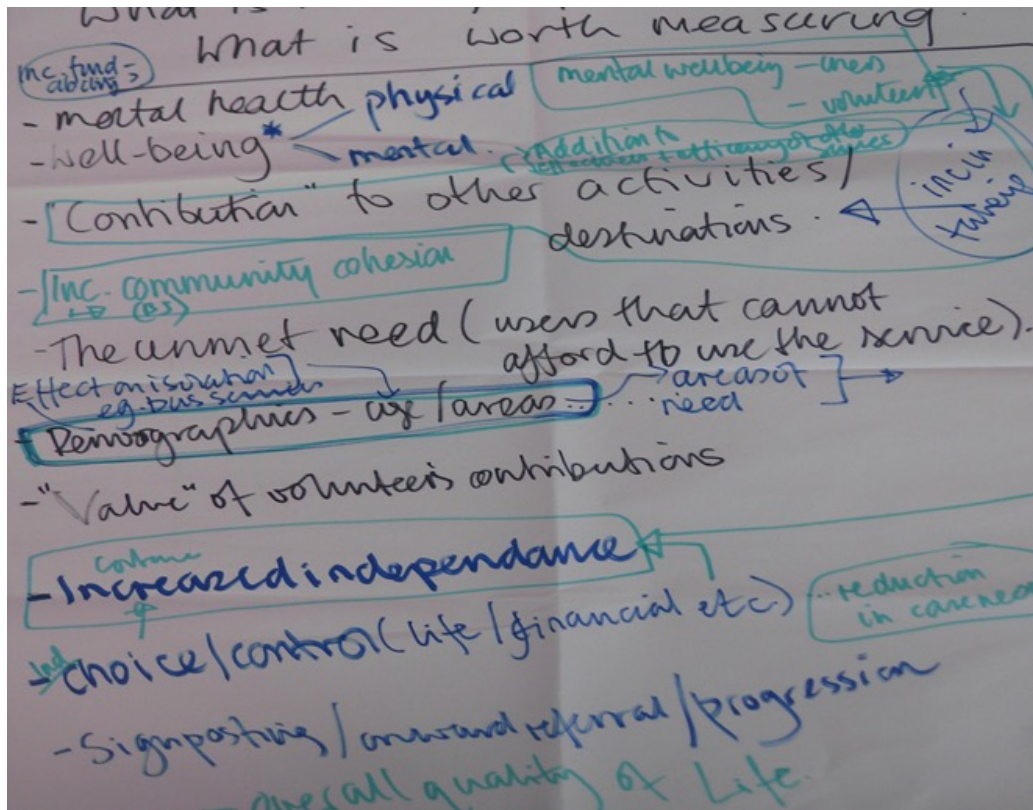
1. What is important for your organisation to measure?
2. Source data
  - Critical success factors
  - Performance indicators
  - Mechanisms
  - Frequency
3. Analyse your findings
  - Organise
  - Reflect
  - Analyse
4. Use your insights / conclusions
  - Summative > prove (sales, marketing, fundraising,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

# 1. Deciding what's important

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- Governing documentation
- Strategic objectives
- From your funders
- Intuitively e.g. I know there's a need ...
- Formal tools e.g. Visual storyboard

## 2. Source the data / indicators – what to capture



- E.g. Increased independence
- Increased financial freedom
- Increased discretionary spend
- Decreased proportion of earnings spent on housing / food/ energy/ debt repayment
- Increased feelings of control
- Reduced feelings of anxiety
- Increased quality of life (happiness?)
- Etc.

## How to capture information (mechanisms)

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

## When to capture information (frequency)





## Step 3: Analyse the data

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- Organise the data
- Consider or analyse data for themes or patterns
- Look at social and beneficiary impact, environmental impact, financial metrics, and other aspects of your project or organisation
- NB: Visualisations almost always help (maps, graphs, the Periodic Table etc.)
- Reflect on data
- Do you have evaluation questions or a question that you are trying to answer in your work?
- Theorise or draw conclusions

# When in doubt...

## ... Use other people's work

- Financial Analysis of Supporting People
- TOMS (Themes, Outcomes, Measures) calculator
- HACT Social Value Bank
- New Economy Unit Cost Database
- HMRC Green Book etc.



The National TOMS Framework - Themes and Outcomes 2018

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

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

Client group	Cost (£m)	Net financial benefit (£m)
People with alcohol problems	(20.7)	92.0
Women at risk of domestic violence	(68.8)	186.9
People with drug problems	(30.1)	157.8
Homeless families with support needs – settled accommodation	(32.5)	(0.5)
Homeless families with support needs – temporary accommodation	(17.5)	28.5
Single homeless with support needs – settled accommodation	(130.1)	30.7
Single homeless with support needs – temporary accommodation	(106.7)	97.0
People with learning disabilities	(369.4)	711.3
<b>Total</b>	<b>(254.4)</b>	<b>559.7</b>

Outcome category	Outcome detail	Cost code	Cost / saving detail	Unit	Agency bearing the cost / making the fiscal saving		Fiscal value			Cost (£m)	Net financial benefit (£m)
					Level 1	Level 2	Estimated cost/saving	Year	Updated cost/saving		
HOUSING	EVICTION	HO1.0	Average fiscal cost of a complex eviction	Per incident	Local authority	RSL	€ 6,680	2010/11	€ 7,276	(55.4)	40.3
HOUSING	EVICTION	HO2.0	Average fiscal cost of a simple repossession	Per incident	Local authority	RSL	€ 690	2010/11	€ 752	(198.2)	646.9
HOUSING	HOMELESSNESS	HO3.0	Homelessness application - average one-off and on-going costs associated with statutory homelessness	Per application	Local authority	RSL	€ 2,501	2010/11	€ 2,724	(97.3)	628.0
HOUSING	HOMELESSNESS	HO4.0	Temporary accommodation - average weekly cost of housing a homeless household in hostel accommodation	Per week	Local authority		€ 107	2010/11	€ 117	(28.4)	73.3
HOUSING	HOMELESSNESS	HO5.0	Homelessness advice and support - cost of a homelessness prevention or housing options scheme that leads to successful prevention of homelessness	Per scheme	Local authority		€ 642	2010/11	€ 699	(24.9)	(18.3)
HOUSING	HOMELESSNESS	HO6.0	Rough sleepers - average annual local authority expenditure per individual	Per year	Local authority		€ 7,900	2010/11	€ 8,605	(94.9)	26.6
HOUSING	BENEFITS	HO7.0	Housing Benefit - average weekly award, across all tenure types	Per week	DWP	Local authority	€ 93	2010/11	€ 94	(38.1)	26.7
HOUSING	BENEFITS	HO8.0	Housing Benefit - average cost of processing a Housing Benefit/Local Housing Allowance application	Per application	Local authority	DWP	€ 48	2010/11	€ 52	(12.7)	(0.7)
										<b>(1,612.4)</b>	<b>3,409.4</b>

## Step 4: Using your insights

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

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

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

# Sharing your impact – readership, form and tone

Haringey Advisory Group on Alcohol  
ANNUAL REPORT 2008

## Haga

STORIES, ADVICE & MORE

**SUDOKU CHALLENGE**  
Turn to page 14 to play!

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

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

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

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

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

## Services for children

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

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



**In 2015-16, we helped 3,650 children. This is an increase of 66% from the previous year.**

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

- In 2015-16:**
- We supported **164** children who had been trafficked.
  - Our Age Disputes project is the only project in the UK with a focus on visiting children in detention to help them demonstrate their age and secure their release from detention.
  - We supported **292** separated children with maths and English classes, a busy programme of homework clubs, as well as drama, art, and music sessions.

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

Young girl supported by our Trafficked Girls' Project



**Qasim's Story**

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

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

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

T 0207 346 1205 www.refugeecouncil.org.uk

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

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

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

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

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

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

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

## Adventure Learning Impact Map

Logo

**Why we exist**

- To unlock the potential in young people through learning & adventure in the wild
- All have the belief that we all have undiscovered potential

**Who we support**

- ✓ Children with behavioral issues
- ✓ Parents not able to connect with their children
- ✓ Schools unable to reintegrate children

**How we support**

- Mountain adventure challenges
- River adventure challenges
- Re-integration follow up program

**Our USPs**

- Taking individuals out of their comfort zone
- Encouraging peer to peer support
- Previous participants becoming leaders

**Outcome journey**

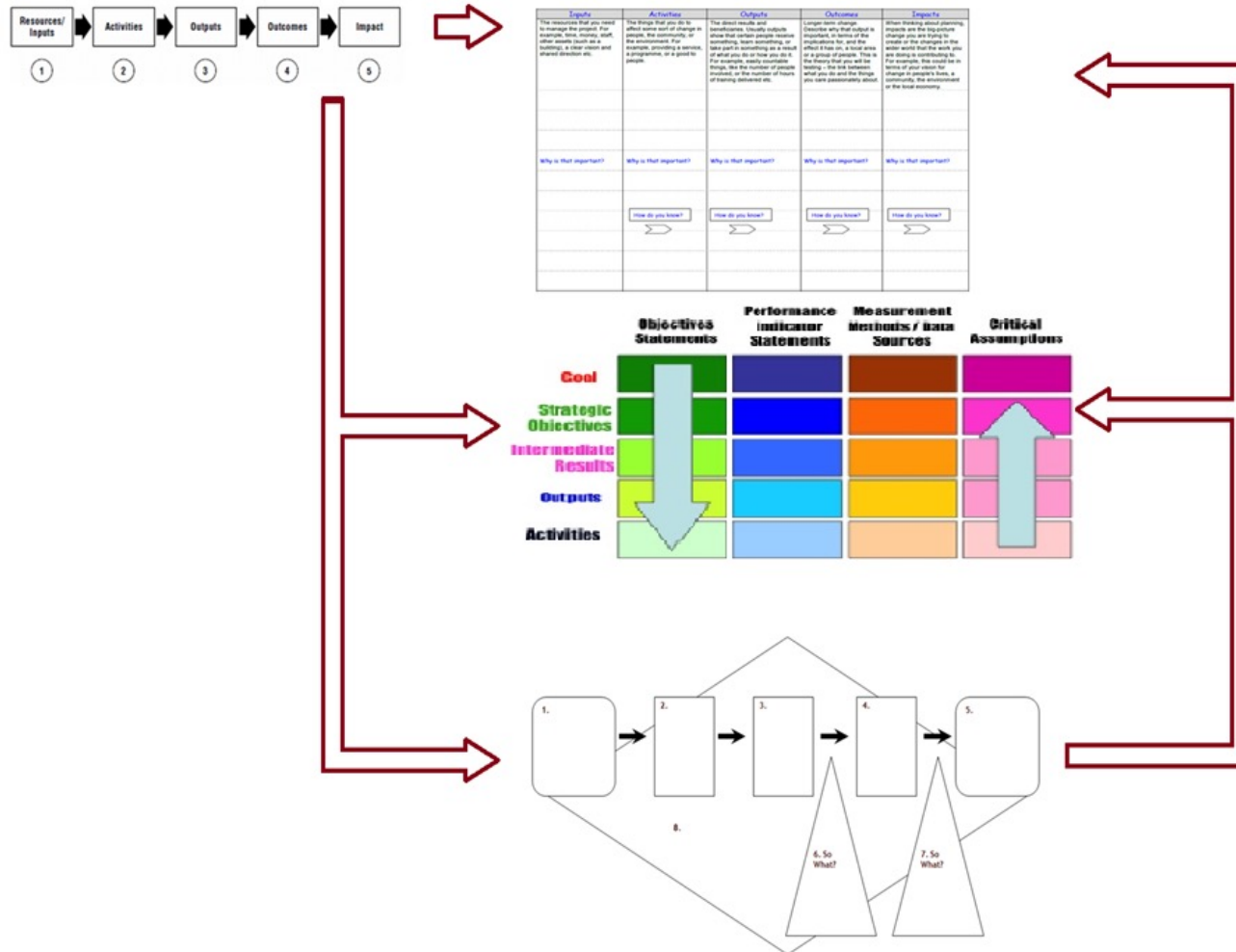
Short term	Intermediate	Long term
<ul style="list-style-type: none"> <li>• Opportunity for distraction</li> <li>• Escape from day-to-day life</li> <li>• New practical skills</li> </ul>	<ul style="list-style-type: none"> <li>• Access to positive role models</li> <li>• New positive friendships</li> <li>• Confidence to complete challenges</li> </ul>	<ul style="list-style-type: none"> <li>• Increased respect for adults</li> <li>• More aspiration to try new things</li> </ul>

**Wider impact**

- Local authority: Reduced neighbourhood incidents
- Local authority: Communities feeling safer
- Local authority: Increased number of young people

Powered by **MUESLI**

# Developing your practice



## Some useful links

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

## Next steps

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### DSC Publication

Available at DSC [www.dsc.org.uk/publications](http://www.dsc.org.uk/publications)

### Further Training, Coaching or Mentoring

If you would like to discuss how DSC can help with your Learning and Development, online or otherwise, please contact [cschimmin@dsc.org.uk](mailto:cschimmin@dsc.org.uk) 07967 027304

### DSC Information and Resources

You can find lots of funding information, updates and resources at [www.dsc.org.uk](http://www.dsc.org.uk)



## Attend an exclusive masterclass session

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**Feel you would benefit from being able to dive into specific questions relating to understanding and quantifying your organisation's social impact?**

Register your interest via the webinar feedback form and you could be joining Robert for a one hour masterclass where you can get answers to any burning questions and hopefully help better plan, measure, evaluate and manage your impact.

The masterclass will take place via Microsoft Teams and spaces are limited to enable attendees to get the most out of the time allocated.

**Wednesday 29 November**  
**10:00 – 11:00am**

Apply via the webinar feedback form  
(Successful applicants will be notified by Wednesday 22 November.)



## 4. Join our Movement for Good network

*“The Movement for Good Network brings together a group of special charities to learn, share feedback and gain access to extra opportunities and support. We want to get to know your fantastic organisations better and do more to support you!”*



# Thank you for listening



[www.benefactgroup.com/fundraising](http://www.benefactgroup.com/fundraising)



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