



# 7 STEPS TO EFFECTIVE IMPACT MEASUREMENT



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# ABOUT THIS MANUAL

## The challenge of measuring social impact

Measuring social impact is becoming an increasingly important area for not-for-profit organisations running activities to address social problems and the funders and networks that support them. And yet measuring social impact can present significant challenges:

- Measuring social impact can involve measuring complex elements such as whether self-esteem increases for an individual or to what extent a change can be attributed back to the activities of not-for-profit organisations.
- This requires a high quality and robust approach to measuring social impact and it can be difficult for organisations to know how to go about this or where to start.
- Terminology in relation to measuring social impact can be used differently across the not-for-profit sector and hard to understand.
- Even for organisations that have established processes and tools in place for measuring social impact it can be difficult to know if what they are doing is of sufficient quality and how they can improve.

## Impact measurement in 7 steps

This inFocus guide addresses the challenges above by taking the reader through seven steps, from deciding on an approach to measuring social impact through to using data effectively to improve programmes and drive fundraising and growth. Along the way we provide examples and additional 'mini-guides' to help you to go into more depth and practically apply the knowledge from the manual.

“

*the way to deal with an impossible task was to chop it down into a number of merely very difficult tasks, and break each one of them into a group of horribly hard tasks, and each of them into tricky jobs, and each of them....*

**Terry Pratchett**

# ABOUT THE AUTHORS



**inFocus Enterprises** is a social impact consultancy firm, specialising in social impact measurement, strategy and evaluation. It is comprised of an international team of specialists who are committed to supporting a global portfolio of clients to increase the positive impact on their activities upon the lives of people and communities from around the world, working with a mix of non-profit, for-profit or public entities.



**Tom Keyte**  
Deputy Director



**Heather Ridout**  
Senior Consultant

inFocus's mission is to ensure individuals, organisations and communities are effectively empowered by sustainable and transformational solutions to resolve long term and complex social issues. We support organisations in understanding the impact they hope to achieve and subsequently develop the right skills, capacities and tools to deliver greater impact through their initiatives that can change lives and communities for the long term.

## Acknowledgements

This manual has been developed in consultation with the following partners and their associated networks of sports based community partners: Laureus Sport for Good Foundation, streetfootballworld, Clinton Foundation, International Sport and Culture Association (ISCA) and Move Quality partners.



# USING THIS MANUAL

## Who is this Manual for?

This guide provides guidance and resources for not-for-profit organisations running activities to drive social change, and the funders and networks that support them. The guide is designed to help organisations and individuals in a number of different scenarios:

“We are new to the area of measuring social impact and are looking for advice/resources to get started”

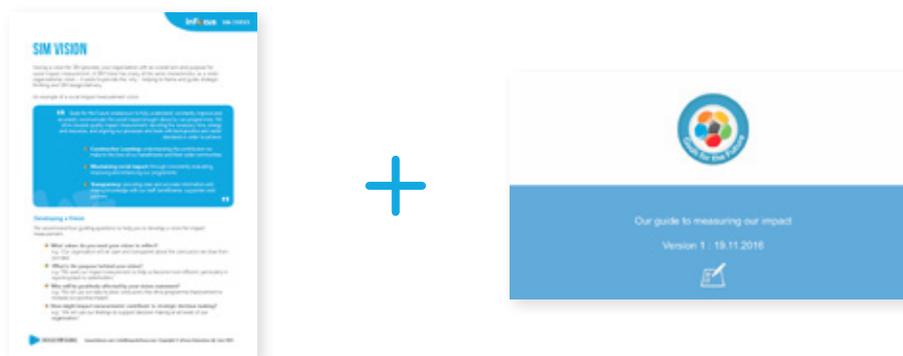
“We have tools and processes in place to measure social impact and are looking for ideas on how to improve”

“I have a role in measuring social impact in my organisation and I am personally interested in learning more about the topic”

“I’m responsible for funding not-for-profit organisations and want to be able to talk to them about measuring their social impact”

## How to get the most out of the guide

To get the most out of this guide we recommend using it in combination with two other resources/sets of resources:



To learn more, and to apply some of the key principles there are a set of free ‘mini-guides’ you can access by logging into the tools and resources section of the [inFocus website](#).

Throughout the guide you can also get an example of how a fictional organisation; Goals for the Future has applied the 7 steps in a [manual](#) that can be used to share their approach to measuring social impact.

# WHAT IS SOCIAL IMPACT MEASUREMENT?

## What is Social Impact?

Social impact relates to the long-term positive changes, for individuals, communities, and society as a whole, that result from activities or services provided by development-sector organisations. InFocus has categorised the different activities or services of organisations we work with into the categories in the diagram to the right.



*We define impact as any effects arising from an intervention. This includes immediate short-term outcomes as well as broader and longer-term effects. These can be positive or negative planned or unforeseen.*

**Big Lottery Fund**

## Why measure social impact?

There are many reasons to measure social impact, we identify five of the main reasons below:

imagine if...



You could report back to funders on time with quality reports (accountability)



You can use the strength of your impact measurement, and results, to attract new funders (fundraising)



You can use findings from your impact measurement to improve your activities, leading to better results for your participants (learning & improving)



You have powerful data/stories to use to promote your organisation (marketing & communication)



You can use findings from your impact measurement to share with other organisations in the sector and collaborate (collaboration)

## Measuring Social Impact

When we use the term 'measuring social impact,' we are referring to the measurement of both long term social change and what happens along the way to this change, from details about the social problem you are addressing, to details about the activities you run and the short-medium term results of these activities. Measuring social impact can help to answer a number of questions:

### Social problems in community/society



### Activities to address social problems



### Social change generated by activities



To what extent does the **problem** exist and who is it affecting?

What are our **outputs**, the immediate results of activities (e.g. attendance)?

What are the short-mid term social changes (**outcomes**) and long-term results (**impacts**) of our activities?

To what extent are the outcomes a result of our activities? (**attribution**)

The measurement of social impact can take place at different levels, from **delivery agencies**, organisations working directly on the ground to address social issues, to **funders** and **networks** that are looking to measure results across the organisations they support.

## Options for measuring social impact

At inFocus we identify three main ways in which you can measure social impact that can be used alone or in combination:

### MONITORING

...the systematic and continuous assessment of the progress of a piece of work over time, which checks that things are 'going to plan' and enables adjustments to be made in a timely way, integral to day to day management.

*INTRAC M&E toolkit*

### EVALUATION

Evaluations complement ongoing monitoring activities by providing more in-depth, objective assessments of the relevance, efficiency, effectiveness, impact and sustainability of programmes at a particular point in time.

*Oxfam Rough Guide on M&E*

### RESEARCH

Systematic Investigative process employed to increase or revise current knowledge by discovering new facts, it is divided into two general categories; 1) Basic Research is inquiry aimed at increasing scientific knowledge, and 2) applied research is effort aimed at using basic research for solving problems or developing new processes, products, or techniques.

*Business Dictionary.com*

## This guide will take you through 7 Steps to measuring social impact:



**Step 1:** Decide on your overall approach to measuring social impact by developing a vision, deciding how to measure social impact (whether to use monitoring, evaluation and/or research) and who to involve.



**Step 2:** Decide what to measure by exploring mapping out your programmes with programme theory and how to prioritise and use learning questions



**Step 3:** Select/develop indicators that will identify what has take place as a result of running your activities and to what extent



**Step 4:** Plan your data collection by selecting the right data collection method, taking a quality approach to sampling and finalising your indicator framework



**Step 5:** Develop data collection tools (we focus on questionnaires in this guide) to collect high quality data



**Step 6:** Collect and manage your data through effectively deploying data collection tools, ensuring the data you collect is high quality and secure, and selecting the right software for your organisation



**Step 7:** Use the data you collect: effectively analyse and learn from your data to improve the delivery of your activities, your fundraising and your accountability back to stakeholders.



# 1. WORK OUT YOUR APPROACH

You probably want to get going with collecting and analysing your data, however, we recommend taking a step back and considering your vision and overall approach to measuring social impact, as well as who you need to get involved.



*"It starts with vision, and the clarity of vision"*

**Jeff Weiner**

## Creating a Vision for Impact Measurement

An impact measurement vision (also known as an evaluation vision) describes your organisation's overall aim and purpose for measuring impact, and the values you will follow in relation to this (such as openness with sharing results). An impact measurement vision has many of the same characteristics as a wider organisational vision; it helps to provide the *'why'* in relation to impact measurement. [Click here](#) to access our guide on Creating an Impact Measurement Vision.

## Deciding how to measure impact

Next you need to make a decision about your overall approach of how to measure impact, choosing between monitoring, evaluation and research (or a combination of the three). The decision on which to use will depend upon: resources you have available, the internal and external expertise you can call upon, and what stage you are at with your impact measurement 'journey' ([click here](#) for our guide). There are also several different types of evaluation that support different objectives, for example, a formative evaluation is intended to help shape and improve your programme - [click here](#) for our evaluation types guide.



### FURTHER READING



You can learn more about creating an evaluation vision in this report from FSG.

## Deciding who to involve

Finally, it is time to start thinking about who you need to involve in your impact measurement. Internally, this might include anyone related to the impact measurement process, from senior management to volunteers that could help to collect and enter data. Externally this could involve impact measurement consultants or researchers that could support with different steps in the process (e.g. designing data collection tools).



## 2. DECIDE WHERE TO FOCUS

It's unlikely that you have unlimited resources for impact measurement, which means you need to decide what is most important to measure and where to focus your impact measurement.

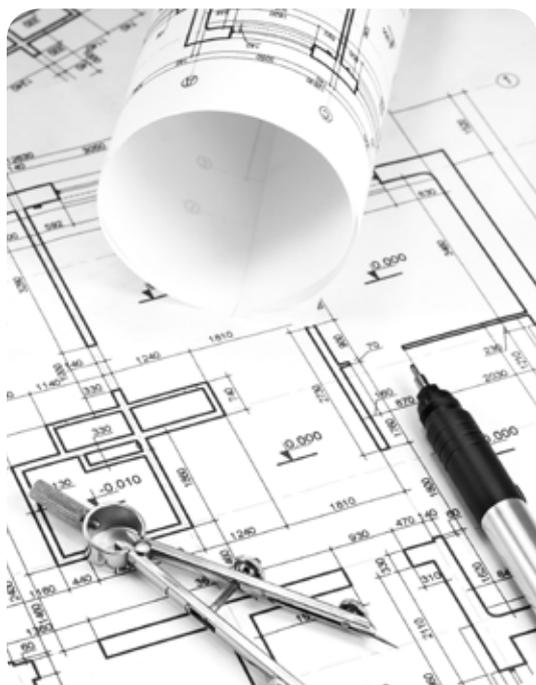


*Things which matter most must never be at the mercy of things which matter least.*

**Johann Wolfgang von Goethe**

### Programme theory : 'Using a blueprint'

When industrial machinery is designed a blueprint, or technical design, is produced to show how the machine will function and produce outputs. This blueprint can also be used to help identify where to test the machine. *Programme theory* works in much the same way for social programmes, mapping out how you believe your programmes (the activities you run) lead to social impact and what role external actors play in this. There are lots of different techniques used to create programme theory. At inFocus our preferred method is *theory of change*; you can find out more about theory of change in the eLearning module [here](#), and in the video on the history of theory of change [here](#).



### Prioritisation and Learning Questions

Having a 'blueprint' of how you assume your activities will lead to social change can help with prioritisation in combination with our guide [here](#) on *how to prioritise what to measure*. This involves looking at your programme theory and thinking through *why you need the data* from your impact measurement (i.e. for learning and improving or fundraising), and the scope of your impact measurement (i.e. whether to focus on a particular target audience or programme).

**Learning questions** can also be a very effective way of focusing your impact measurement. These are the questions that the data you collect and analyse through impact measurement will answer, for example, *'did our programme produce the intended outcomes in the short, medium and long term?'*



### TOP TIPS

Learning questions don't need programme theory to function, you can generate learning questions separately from programme theory and develop indicators



### FURTHER READING

Click here to find further examples of typical Learning questions from [betterevaluation.org](http://betterevaluation.org)



# 3. DEVELOP INDICATORS

Now you have decided where to focus your impact measurement it's time to get into detail and develop indicators, specific pieces of information that show whether something has taken place and to what extent (e.g. the no. of participants that access employment 6 months after the programme). Indicators can clarify and guide your impact measurement. You can find out more about different types of indicators in our guide [here](#).

## Selecting Existing Indicators

We recommend starting by exploring indicators that are already used by other organisations in the sector. Our guide on *external indicator resources* [here](#) can be a useful starting point. These indicators can either be copied and used directly, or can serve as inspiration and stimulus for bespoke indicator development, or be adapted to fit your context

### TOP TIPS

It's important to consider whether an indicator will work in your particular context, for example, self-esteem indicators developed in one country might not be appropriate in another.



*Data is like garbage. You'd better know what you are going to do with it before you collect it.*

**Mark Twain**



**“At least we are consistently inconsistent.”**

## Developing New Indicators

Sometimes it just won't be possible to find indicators that are the right fit for what you want to measure and you will need to develop your own. We make this easier through our *6 step guide to creating quality indicators* [here](#). Once developed you then need to enter your indicators into an indicator and data collection framework, an Excel workbook that lists indicators against elements (e.g. outcomes) related to your programme theory, or directly against learning questions.

## Prioritising and Validating Indicators

You may end up with a long list of indicators so we recommend that you prioritise which indicators to use and validate your indicators to check they will be fit for purpose. You can find our more in our guide [here](#).



# 4. PLAN YOUR DATA COLLECTION

You now have your indicators and have decided what to measure. The next step is to decide what methods to use to collect data against your indicators and plan who you will collect data from.

## Choosing data collection methods

There are a wide range of different data collection methods you can choose from to collect data. Choosing which to use can be a difficult decision. It can help to consider a number of factors in making your decision:

- Do you want to use validated or custom tools?
- What capacity do you have to use different methods?
- Will you use more creative data collection methods?
- Will you be collecting against qualitative or quantitative indicators?
- Are there tools you could use that would use more participatory approaches?

We have listed a range of data collection methods you can select from our Prezi guide [here](#).

## Sampling

Your next step is to decide whether data will be collected from all of your target group or a representative proportion of this, known as a *sample population*. Sampling is used when it isn't possible to collect data from all of your participants. Samples can be *random* (all participants have an equal chance of being included) or *non-random* (respondents are systematically selected). You can find more about sampling and control groups in our guide [here](#).



## Completing your indicator framework

Now you know how you will collect the data your final step is to complete your data collection and indicator framework by adding additional details such as *data collection method, baseline and target*.



*...he (Sherlock Holmes) swept the matter away with a wave of his hand when I mentioned it. "Data! Data! Data!" he cried impatiently. "I can't make bricks without clay."*

**Arthur Conan Doyle**



### TOP TIPS

You might want to consider using a 'mixed method' approach to collecting data by using different data collection methods to look at an indicator from two different angles.



# 5. DEVELOP DATA COLLECTION TOOLS

It's now time to develop the specific tools you will use to collect data. In this guide we focus on questionnaires, because they are perhaps the most common data collection tool used for impact measurement.



*We get wise by asking questions and even if these are not answered we get wise for a well-packed question carries its answer on its back as a snail carries its shell*

**James Stephen**



## Avoiding Bias

Bias is defined as a tendency which prevents unprejudiced consideration of a question. Whilst it is impossible to completely eliminate the risk of bias, careful and critical planning, design, and deployment can help reduce bias.

## Using Existing Questionnaires

You can start developing your questionnaires by looking at existing questions and questionnaires and seeing if these would be useful for your context. An example of a resource detailing existing questions is highlighted below.

## Developing your own questions

It is unlikely that you will find all of the questions you need from existing resources. In order to develop your own questionnaire you may therefore need to develop some of your own questions. You can find more about how to develop your own questions in the inFocus guide [here](#).

## REAL WORLD EXAMPLE

Click here to find out more about avoiding respondent bias from [fluidsurveys.com](https://fluidsurveys.com)

## FURTHER READING

The Laureus Toolkit, developed in back in 2009, is still an excellent resource for finding questions already in use. You can access the guide [here](#).





# 6. COLLECT AND MANAGE YOUR DATA

You should now have a set of high quality indicators and data collection tools. The next step is about how you use these tools to effectively and efficiently collect and manage data..

“

*I kind of have to be a master of cleaning, extracting and trusting my data before I can do anything with it*

**Scott Nicholson**

## Deploying data collection tools

We recommend considering three steps in deploying data collection tools:

### 1 Training Staff

Training staff in the fundamental tenants of responsibly collecting high quality data

### 2 Piloting Tools

Piloting tools for relevance and effectiveness, for example, are the questions understood by respondents

### 3 Deploying Tools

Thinking through, and planning, when and how to deploy your data collection tools

## Data quality and Security

Ensuring that you have high quality data, and that the personal data you collect about beneficiaries is secure, are two forgotten but important considerations in measuring impact. Bad quality data provides a poor basis for learning and drawing conclusions, and insufficient protection of personal data can lead to ethical and (depending upon the country where you are based) legal challenges. You can find out about simple steps you can take to address data quality and security in our guide [here](#).

## Choosing Software

It is also important to consider what software you will need for entering, managing and analysing data. There are a number of options available, from using Excel spreadsheets to specialist online software designed specifically for impact measurement. You can find out more about decisions in relation to choosing software in our guide [here](#).





# 7. USING YOUR DATA

When you arrive at Step 7 you now have high quality data to play with. This final step covers learning from the data to improve activities and share your results for marketing and fundraising.

## Learning from your data

Learning from your data is about *telling the story* of what happened with your activities. We recommend going through 5 steps to get to the point where you can interpret and learn from your data:

1. Review learning questions and indicators
2. Select tools for analysis (e.g. Excel)
3. Prepare your data
4. Display your data (e.g. in charts and graphs)
5. Interpret and draw conclusions from your data

For this last step we recommend going through some key questions when you are reviewing your data in our guide [here](#).



### TOP TIP

Before embarking on the steps to learn from your data we recommend considering the time it can take to analyse data and who you can ask for support.



*Data will talk to you if you are willing to listen*

**Jim Bergeson**

## How to use your results

There are many different ways to use the learning from your data. A good starting point can be to create a calendar to plan when you can use your data across the year, for example:

- when/if data is needed by funders as part of the condition of receiving funding e.g. at the beginning or end of a grant
- when you could use the data as an opportunity for learning (what we call a 'learning event') e.g. monthly meetings and/or in an annual retreat
- when you could share data with key stakeholders e.g. through an annual report
- where you could use data for communications and marketing e.g. in a newsletter

# TAKING THE NEXT STEPS WITH IMPACT MEASUREMENT

There are a number of ways you can continue to improve your impact measurement and learn more about the topic:

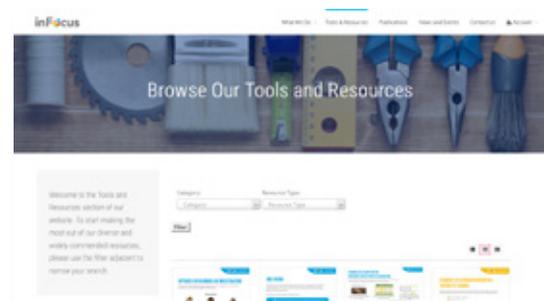
## 1. Join a Training Course

inFocus runs a range of impact measurement training courses that can help to increase your knowledge, interact with other organisations and improve your organization's impact measurement practices. This includes 'How to Measure Impact: The 7-Step inFocus Training Course', an interactive course that takes you through practical exercises to apply the steps from this guide. To find out more visit the training section of our website [here](#).



## 2. Access Impact Measurement Resources

You can find all of the inFocus resources featured in this guide, and many more, in the resources section of the [www.impactinfocus.com](http://www.impactinfocus.com) website. Our resources are designed to help you to improve different impact measurement challenges, from choosing respondents and samples to advice on developing questionnaires.



## 3. Any further questions?

If you have questions, or need further support with impact measurement, you can contact the inFocus team here:

[info@impactinfocus.com](mailto:info@impactinfocus.com)

