

Abstract

Social Value UK have produced a collection of Outcome Frameworks and Standalone Measures for The National Lottery Community Fund. This report is an accompaniment to a spreadsheet database. It sets out the scope, methodology and key findings.

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Outcome Frameworks and standalone measures

Accompanying Report

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# Introduction

For small and medium-sized organisations, finding the most relevant or appropriate outcome frameworks or measures can present a significant challenge. For this reason, The National Lottery Community Fund have commissioned Social Value UK to identify and create a list of outcome frameworks and standalone measures relevant to charities, community and voluntary organisations in the UK. This list will inform organisations working with The National Lottery Community Fund and others.

A spreadsheet database has been produced detailing a range of outcome frameworks and standalone measures relating to community and voluntary organisations. This report has two main sections. Section A complements the spreadsheet by providing information on the methodology used to compile the list, the rationale for inclusion of outcome frameworks and standalone measures and an explanation of the data fields. Section B includes a summary of key findings and outlines recommendations for next steps.

There is an appendix with a user guide, a glossary, an overview of approaches that did not fall within the scope of this research, as well as some further information about Social Value UK and the Global Value Exchange.

# Scope and definitions

This could be a very big exercise, and due to the limited timeframe and budget of this project we had to agree upon a scope. A scoping meeting was undertaken by Social Value UK and The National Lottery Community Fund in November 2018 where the scope and definitions for the research was established.

## Inside of scope

For this exercise, an outcome framework was defined as:

"*an outcome framework is a set of outcomes that has been published to promote consistency of impact measurement. These outcomes may be mapped against stakeholder group, domain or organisational goal. Outcome frameworks are generally published to help one or more organisations be consistent in their reporting of outcomes. Some outcome frameworks include measures for each outcome"*.

As such, guides to creating outcome frameworks and outcome frameworks created as part of a specific analysis (e.g. an organisation’s impact report or a Social Return on Investment analysis) do not fall within scope.

A standalone measure was defined as:

"A *standalone measure provides information on how much of an outcome has happened or is expected to happen. These can be based on information provided by those experiencing the outcome (for example, using questionnaires or scales) or from other sources (for example, employment statistics). Standalone measures are those which have been published independently of an outcome framework. Standalone measures can be objective or subjective*".

As such, measures which have been produced as part of an outcome framework have not been included. Instead, a data field ("Outcome framework measures") has been included on the Outcome frameworks tab of the spreadsheet to indicate whether the outcome framework includes measures.

## Outside of scope

When searching for ways to measure outcomes there are a range of **tools** and **approaches** that are useful for people working for charities and community and voluntary organisations. Both tools and approaches were considered to be out of scope of this project.

We have defined tools as:

"*a platform or resource designed to support impact data collection or analysis. This could be further defined as tools that do the following:*

1. *provide the ability to collect information directly from stakeholders*
2. *provide benchmark information*
3. *store, visualise and analyse impact data*
4. *case management systems*
5. *diagnostic self-assessments”*

See the "Tools" tab of the spreadsheet database for examples of each type of tool.

Social impact approaches are defined in this document as:

"*methodologies or guidance relating to impact measurement. Rather than a specific scale or measurement tool, an approach provides a set of principles or guidelines as to what information should be collected and how*"

As discussed in Section B, it is recommended that any expansion of this exercise should consider guidance in the context of relevant approaches to social impact measurement.

See Appendix B and the "Approaches" tab of the spreadsheet examples of different approaches to impact measurement.

# Section A: Methodology

This section describes our approach to completing the task. It describes how we collected, screened and then how we structured the information within the attached spreadsheet database.

## Step One: collecting the information

Compiling the outcome frameworks and standalone measures required collecting information from a variety of sources. The main sources were; a) speaking to experts through **outreach**, b) **online searches**, c) **existing libraries** of impact measurement information, and d) the **reference lists** of outcome frameworks and standalone measures (or associated methodology papers).

### Outreach

Social Value UK contacted a range of experts with experience supporting the community and voluntary sector and requested suggestions for outcome frameworks and standalone measures to be included in the spreadsheet. All of the inspiring impact partners were contacted directly via email and phone. An open request for information was sent out using social media channels from Social Value UK and dedicated emails and calls were made to Social Value UK members who work in specific sectors.

The following individuals should be acknowledged for their useful responses:

* **Ruth Melville - MB Associates**
* **Steven Marwick - E**valuation Support Scotland
* Tris Lumley - NPC
* James Noble - NPC
* James Williams - HACT

### Online searches

Online searches were conducted on both the Google search engine (www.google.com) and the Google Scholar search engine (https://scholar.google.co.uk/) using the following search terms:

* "Employment, training and education" **and** "outcome frameworks**"** **or** "scales" **or** "measures"
* "Housing and local facilities" **and** "outcome frameworks**"** **or** "scales" **or** "measures"
* "Income and financial inclusion" **and** "outcome frameworks**"** **or** "scales" **or** "measures"
* "Physical health" **and** "outcome frameworks**"** **or** "scales" **or** "measures"
* "Mental health and well-being" **and** "outcome frameworks**"** **or** "scales" **or** "measures"
* "Family, friends and relationships" **and** "outcome frameworks**"** **or** "scales" **or** "measures"
* "Citizenship and community" **and** "outcome frameworks**"** **or** "scales" **or** "measures"
* "Arts, heritage, sports and faith" **and** "outcome frameworks**"** **or** "scales" **or** "measures"

### Existing libraries

Existing libraries of impact measurement information (including outcome frameworks and measures) were sourced through feedback from experts and online searches. These are listed in Table 1 below.

|  |  |  |
| --- | --- | --- |
| **Library name** | **Library description** | **URL** |
| The Global Value Exchange | The Global Value Exchange is a crowd-sourced database of impact measurement information. The database hosts around 30,000 impact measurement metrics sourced from a range of organisations and individual practitioners. | <http://www.globalvaluexchange.org/> |
| Inspiring Impact Resource Hub | The Inspiring Impact Resource Hub is a platform listing outcome frameworks, standalone measures, tools, and guidance documents. It has been produced as part of the Inspiring Impact programme to aid charities and social enterprises in measuring social impact. | <https://www.inspiringimpact.org/resource-hub/> |
| NEF Consulting Prove and Improve Toolkit | The NEF Consulting Prove and Improve Toolkit is a platform listing outcome frameworks, standalone measures, tools, case studies, and guidance documents. | <https://www.nefconsulting.com/our-services/evaluation-impact-assessment/prove-and-improve-toolkits/> |
| Evaluation Support Scotland Resources | The Evaluation Support Scotland Resources page is a platform listing outcome frameworks, standalone measures, case studies, tools, and guidance documents. | <http://www.evaluationsupportscotland.org.uk/resources/> |
| CORC Outcome & Experience Measures | A list of standalone measures relating to mental health, life circumstances and well-being of young people. This list is managed by the Child Outcomes Research Consortium (CORC). | <https://www.corc.uk.net/outcome-experience-measures/> |
| PerformWell Survey/Assessment Directory | The PerformWell Survey/Assessment Directory is a list of standalone measures covering a broad range of outcome groups. Standalone measures are categorised by outcome group and program category. | <http://www.performwell.org/index.php/find-surveyassessments> |
| Youth Music Network Resources Page | The Youth Music Network Resources Page is a list of outcome frameworks, standalone measures, tools, and guidance documents. Resources listed on this page relate to music focused interventions (e.g. music therapy of children with mental health needs). | <https://network.youthmusic.org.uk/evaluation-guidance-evaluation-tools-and-resources> |
| Tools, Instruments, & Questionnaires for research & evaluation of intervention programs | A list of standalone measures and guidance/research documents relating to a range of intervention types (e.g. mental health, physical health and environmental projects). | <http://www.wilderdom.com/tools.html> |

Table 1. Existing databases and resources of social impact measurement information.

### References

In addition to outreach to experts, online searches, existing libraries of impact measurement information, the references of identified outcome frameworks and standalone measures (or associated methodology papers) were checked to identify additional outcome frameworks and standalone measures.

## Step Two: Screening information

The outcome frameworks and standalone measures identified were then screened to determine if they were eligible for inclusion in the spreadsheet.

Screening was done on the following criteria:

* Whether an outcome framework or standalone measure fit the agreed upon definition (as outlined in the glossary of this document)
* Relevance to charities and community and voluntary organisations
* Relevance to the United Kingdom
* Perceived quality (e.g. produced by a well-known organisation, included in a peer-reviewed journal, etc.)
* Providing a "broad spread" of outcome frameworks and standalone measures across each of the outcome groups (outlined in the Taxonomy section below). This was to ensure inclusion of outcome frameworks and standalone measures of relevance to as many intervention types as possible

## Step Three: Structuring the information

To structure the outcome frameworks and standalone measures, a spreadsheet database has been created. This spreadsheet separates the lists of outcome frameworks and standalone measures on different tabs. The data structure has been designed to allow the spreadsheet to be used in its current format by The National Lottery Community Fund (and organisations working with The National Lottery Community Fund) but also contain the necessary sophistication to allow for further expansion and development (see Section B: Next Steps).

The rest of this section describes the taxonomy used to categorise each outcome framework and standalone measure and the data fields in which useful information about each entry has been displayed. The rationale behind these decisions was to allow for useful filtering of the database by users. In this context we considered ‘users’ to be people working with or for charity, community or voluntary organisations with the task of measuring social outcomes.

### Taxonomy

To aid users of the spreadsheet in finding information relevant to their activities, we have mapped each outcome framework and standalone measure to one or more **outcome group**. This enables a user of the spreadsheet to find entries relevant to their particular area of intervention or activity.

We have defined an outcome group as:

"*a broad category into which multiple related outcomes can fall. For example, the outcome group "Mental health" could include the outcomes "change in self-esteem" and "change in anxiety levels". This categorisation by group could also be termed a taxonomy*".

The outcome groups used are based on the Big Society Capital Outcomes Matrix[[1]](#footnote-1), which is "a free tool to help organisations plan and measure their social impact". The Big Society Capital Outcomes Matrix has been chosen because it has been created with community and voluntary sector organisations in mind and covers a wide range of thematic areas. Outcome groups are displayed in Table 2.

|  |
| --- |
| **Outcome Groups** |
| Employment, training and education |
| Housing and local facilities |
| Income and financial inclusion |
| Physical health |
| Mental health and well-being |
| Family, friends and relationships |
| Citizenship and community |
| Arts, heritage, sports and faith |
| Conservation of the natural environment |

Table 2. Outcome groups against which outcome frameworks and standalone measures have been mapped

Each outcome framework and standalone measure has been ‘tagged’ or ‘mapped’ to all of the relevant outcome groups to increase the chance of a user finding relevant and useful entries. For example, The Music Therapy Star would best fit into the outcome group "Mental health and well-being" but has also been mapped to the outcome group "Arts, heritage, sports and faith" so it can be found more easily by users working in music-related projects and activities.

This mapping against multiple outcome groups meant that the total number of unique entries was hard to see. As a result, we also created a column so that the lead or ‘most relevant outcome group’ can be stated. Although not as useful to users, a record of the primary outcome group can be used to more easily identify "gaps" in the list. This is listed in the data field "Primary outcome group" and is hidden by default.

A third mapping exercise was undertaken to map outcome frameworks and standalone measures against The National Lottery Community Fund Data Dictionary Classifications. This information is recorded in Column B on the Outcome frameworks tab, and Column B on the Standalone measures tab. It was decided that the best presentation of the list was based on the Big Society Outcome Matrix rather than The National Lottery Community Fund Classifications and so for this reason these columns are hidden by default.

The Homepage tab of the spreadsheet contains a table detailing the number of outcome frameworks and standalone measures which fall into each outcome group for each of the three taxonomy mapping exercises. Only the table for the first taxonomy mapping exercise (Big Society Capital outcome groups) is visible. By default, the tables for the second and third taxonomy mapping exercises are hidden.

Users of the spreadsheet may prefer to search the spreadsheet by thinking about the type of people their interventions or activities impact. For this reason, outcome frameworks and standalone measures have also been mapped by **stakeholder** **group**.

Stakeholder group is defined as:

"*people, organisations or entities that experience change, whether positive or negative, as a result of the activity that is being analysed*".

The stakeholder groups used are based on the Big Society Capital Outcomes Matrix. These are displayed in Table 3.

|  |
| --- |
| **Stakeholder Groups** |
| People experiencing long term unemployment |
| Homeless people |
| People living in poverty and/or financial exclusion |
| People with addiction issues |
| People with long-term health conditions/life threatening or terminal illness |
| People with learning disabilities |
| People with mental health needs |
| People with physical disabilities or sensory impairments |
| Voluntary carers |
| Vulnerable parents |
| Vulnerable children (including looked after children) |
| Vulnerable young people and NEETs |
| Older People (including people with dementia) |
| Ex/Offenders |
| People who have experienced crime or abuse |

Table 3. Stakeholder groups against which outcome frameworks and standalone measures have been mapped.

Several outcome frameworks and standalone measures included in the spreadsheet apply to a broad population (e.g. everyone living within a city) or have not been designed with a specific stakeholder group in mind. For this reason, we have included additional stakeholders, outlined in Table 4.

|  |  |
| --- | --- |
| **Additional stakeholder groups** | **Further information** |
| Individuals | Where an outcome framework or measure is not specific to any stakeholder group included in the Big Society Capital Outcomes Matrix (e.g., the City Resilience Index), the stakeholder group has been listed as "Individuals". |
| Young people | If an outcome framework or measure is relevant to a specific age range of young people, this has been included in brackets (e.g. Young people (aged 8 to 18)). |
| Parents | If an outcome framework or measure is relevant to parents of children of a specific age range, this has been included in brackets (e.g. Parents (of children aged 3 to 13)). |

Table 4. Additional stakeholder groups against which outcome frameworks and standalone measures have been mapped

### Individual versus population level measures

When considering the standalone measures an important distinction needs to be made between measures that are designed to measure an amount of change experienced by one individual and measures that are designed to measure an amount of change experienced by a group of people or population. Measures were categorised with the following tags accordingly; “*individual level”*, or “*community, sector & society level”*. To illustrate this distinction the "Taxonomy" tab of the spreadsheet gives examples of an individual level change and a community, sector & society level change for each of the outcome groups.

Figure 1 gives an overview of the main differences between individual level and community, sector & society level measures.



Figure 1. Overview of main differences between measures used to assess change at the individual level, and the community, sector & society level

### Data fields

To help users navigate the spreadsheet database we designed data fields that allow columns to be filtered to refine the list and find the most relevant outcome frameworks and standalone measures. The data structure of the database is important when considering the next steps and recommendations (see "Data structure" in Section B for more discussion).

A breakdown and rationale for each data field created for outcome frameworks and standalone measures is detailed in Table 5 and Table 6 respectively. Each data field is coded with a unique ID (e.g. OF.001). Unique IDs in the spreadsheet are stored in a hidden cell above the data field headings.

|  |  |  |  |
| --- | --- | --- | --- |
| **Code** | **Data field** | **Further information** | **Data type** |
| OF.001 | Relevant Big Society Capital outcome group(s) | The outcome group or groups relevant to this outcome framework. Outcome groups are based on the Big Society Capital Outcomes Matrix. | Text (predefined categories) |
| OF.002 | Relevant National Lottery Community Fund outcome group(s) | The outcome group or groups relevant to this outcome framework. Outcome groups are based on The National Lottery Community Fund Data Dictionary Classifications. By default this column is hidden. | Text (predefined categories) |
| OF.003 | Primary Big Society Capital outcome group | The outcome group of most relevance to this outcome framework. Outcome groups are based on the Big Society Capital Outcomes Matrix. By default this column is hidden. | Text (predefined categories) |
| OF.004 | Relevant Big Society Capital stakeholder group(s) | The stakeholder group or groups relevant to this outcome framework. Stakeholder groups are based on the Big Society Capital Outcomes Matrix. | Text (predefined categories) |
| OF.005 | Outcome framework name | The name of the outcome framework. | Text (free text) |
| OF.006 | Key words | Key words or phrases relevant to this outcome framework. These are generally based on the outcome groups outlined in the framework (if included). To help with searching, some outcome groups have been reworded, for example, "A resilient Wales" was reworded to "Community resilience". | Text (free text) |
| OF.007 | Name of author/owner/publisher | The name of the author/owner/publisher of the outcome framework. This is often an organisation. | Text (free text) |
| OF.008 | Year published | The year of publication. | Text (predefined categories) |
| OF.009 | Background information | Background information for this outcome framework, such as the outcomes included within the framework. | Text (free text) |
| OF.010 | Outcome framework measures | If an outcome framework includes measures against which outcomes can be assessed, this has been noted in this data field. | Text (predefined categories) |
| OF.011 | Geographical area | If an outcome framework is designed for use within a specific geographical area, this is noted in this data field. | Text (free text) |
| OF.012 | Reference and URL to source | This data field contains a URL to the outcome framework. If a URL is not available then a reference has been provided. | Text (free text) |

Table 5. Data fields for outcome frameworks.

|  |  |  |  |
| --- | --- | --- | --- |
| **Code** | **Data field** | **Further information** | **Data type** |
| SM.001 | Relevant Big Society Capital outcome group(s) | The outcome group or groups relevant to this standalone measure. Outcome groups are based on the Big Society Capital Outcomes Matrix. | Text (predefined categories) |
| SM.002 | Relevant National Lottery Community Fund outcome group(s) | The outcome group or groups relevant to this outcome framework. Outcome groups are based on The National Lottery Community Fund Data Dictionary Classifications. By default this column is hidden. | Text (predefined categories) |
| SM.003 | Primary Big Society Capital outcome group | The outcome group of most relevance to this standalone measure. Outcome groups are based on the Big Society Capital Outcomes Matrix. By default this column is hidden. | Text (predefined categories) |
| SM.004 | Outcome name | The outcome for which this standalone measure can be used to assess. | Text (free text) |
| SM.005 | Individual level or Community, sector & society level | Whether the measure can be used to assess change at the Individual level or the Community sector & society level. | Text (predefined categories) |
| SM.006 | Relevant Big Society Capital stakeholder group(s) | The specific stakeholder group or groups relevant to this standalone measure. Stakeholder groups are based on the Big Society Capital Outcomes Matrix. | Text (predefined categories) |
| SM.007 | Standalone measure name | The name of the standalone measure. | Text (free text) |
| SM.008 | Key words | Key words or phrases relevant to this standalone measure. | Text (free text) |
| SM.009 | Name of author/owner/publisher | The name of the author/owner/publisher of the standalone measure. This is often an organisation. | Text (free text) |
| SM.010 | Year published | The year of publication. | Numeric |
| SM.011 | Background information | Background information for this standalone measure, such as the specific areas covered by the measure or the number of questions it comprises. | Text (free text) |
| SM.012 | Terms of use | Information on the terms of use of this standalone measure, e.g. whether a fee must be paid or whether use is conditional on prior registration with the author/owner/publisher. An assumption has been made that standalone measures published in academic journals are free to use, unless otherwise stated. | Text (free text) |
| SM.013 | Validation | If web searches returned information on the validation of a standalone measure, this has been noted in this data field. | Text (free text) |
| SM.014 | Reference or URL to source | This data field contains a URL to the standalone measure. If a URL is not available then a reference has been provided. | Text (free text) |

Table 6. Data fields for standalone measures.

# Section B: Key findings and technical issues for future considerations

In the timeframe set for this exercise (1 month) 69 outcome frameworks and 78 standalone measures have been identified and collated. We aimed to produce a collection that had a similar amount of entries across the range of outcome groups. One thing that was clear is that we are only scratching the surface in terms of the number of entries that could be collated in this rapidly expanding field.

In this section we set out some of the key findings and technical issues that emerged from the task and should be considered with any future development of this work.

## Measures included within outcome frameworks

Early in the research we realised that most outcome frameworks also contain a set of accompanying ‘measures’ or ‘indicators’ for their outcomes. The spreadsheet database does not contain these measures. This means that many potentially useful measures will not be found by users of this spreadsheet database. A user may find them by following the links in the "Reference and URL to source" data field on the Outcome frameworks tab.

To provide context on the number of additional measures we can confirm that of the 69 outcome frameworks included in this version of spreadsheet, 57 include their own set of measures. For example:

* Measurement Framework for Equality and Human Rights - 25 measures
* National TOMs Framework - 35 measures
* The Global Goals for Sustainable Development - 232 measures
* City Resilience Index - 52 measures
* Big Society Capital - approximately 100 measures

The measures included within outcome frameworks are often based on outputs, secondary data, or measure change at the population level. For example, included in the Global Goals for Sustainable Development outcome framework are measures such as: "Proportion of youth (aged 15-24 years) not in education, employment or training". Although (generally) not as useful as measures that measure an amount of change per person, their inclusion in future versions of the spreadsheet database is worthwhile.

The Global Value Exchange contains 14,213 indicators. Most of these are not standalone measures which measure change at an individual level. These are predominantly measures attached to outcome frameworks from all around the world. You can search these indicators at: http://www.globalvaluexchange.org/.

## Gaps in the data

The exercise of tagging outcome frameworks and standalone measures against one primary outcome group revealed that there were some "gaps" in information. Table 7 below shows the number of outcome frameworks and standalone measures included in the spreadsheet database for each outcome group.

Table 7. Outcome frameworks and standalone measures mapped against one (primary) outcome group

The following outcome groups have less than five outcome frameworks and so reflect a gap in the database:

* Housing and local facilities (3)
* Arts, heritage, sports and faith (4)
* Conservation of the natural environment (1)

This is fairly consistent when we look at the gaps in the ‘stand alone measures’ collection too:

* Housing and local facilities (3)
* Citizenship and community (4)
* Arts, heritage, sports and faith (4)

Although the "Overarching" category includes further outcome frameworks and standalone measures relevant to these outcome groups, we did find there were outcome groups for which much more information was available (in particular, Mental health and well-being). There could be several reasons for this disparity, including an area of research being very well developed (as is the case with standalone measures relating to Mental health and well-being), or an outcome group being "broader" and therefore covering more topics.

## Overarching outcome frameworks

In the spreadsheet database we included 12 outcome frameworks that were not unique to any one sector or outcome group. We have only scratched the surface with these frameworks considering that almost every local authority in the UK now has their own social value strategy with a bespoke outcome framework based on local needs.

This report suggests that collecting all of these and keeping the related information up to date is a never-ending task. Funders, investors or an organisation that wants to standardise the reporting for a group of subsidiary organisations (or programmes) will often be tempted to create a bespoke outcomes framework. With this in mind, it is worth asking – who are outcome frameworks actually for and what purpose do they serve?

## Taxonomies

There are many outcome groups or ‘domains’ that can act as a taxonomy for organising this information. In this exercise we used both The National Lottery Community Fund Data Dictionary Classifications and the Big Society Capital Outcome Matrix. Potential overlaps between these taxonomies are outlined in Figure 2.



Figure 2. Potential overlaps between The National Lottery Community Fund Data Dictionary Classifications and the Big Society Capital Outcome Matrix taxonomies

We could also have used the UN Global Goals for Sustainable Development as a way to organise the entries or numerous other taxonomies. This could be a useful overarching framework to consider due to the rising popularity of the Global Goals by the UK government and the business community.

This report suggests that there is not a definitive taxonomy now nor will there ever be one.

## Data structure

This exercise showed that the outcome frameworks and standalone measures need to be stored in a database with sophisticated ‘one to many’ relationships. This means that:

* an outcome or framework of outcomes can have many stakeholder groups
* an outcome can have many outcome groups
* an outcome can have many measures
* a measure can be linked to different outcomes
* an outcome can be linked to other outcomes as part of a chain of events/theory of change

Figure 3 below illustrates this data structure:

Outcome

Outcome group(s)

Stakeholder group(s)

Outcome(s)

Measure(s)

Outcome(s)

Figure 3. Visualisation of a "one to many" data structure

Spreadsheet databases are not well suited for managing this type of data structure especially as relationships between multiple data points need to be updated as new information is added.

## Semantic searching

One of the main challenges of this exercise is making the relevant data easily accessible to the user. As the collection of entries grows it is harder for the user to find the most relevant information without running multiple searches and using multiple filters.

## Validation of scales and measures

Some of the standalone measures have been ‘validated’. This means that they have been tested in a particular setting and have been deemed to be academically rigorous.

The main challenges we came across were:

1. Availability of data on validation (e.g. due to paywalls on academic journal websites)
2. Tools being validated only for use within a specific context (e.g. for a particular intervention type or stakeholder group) which is likely to be very different to the context a user will be working in. In this case, validation of a tool may be meaningless for that user.

## Assessing popularity or ease of use for measures

As the list grows it would be useful to be able to provide users with information on how widely adopted a measure is or how useful or relevant people have found it to be.

## Broken links

While compiling the list, we came across many URLs to resources which had since been deleted or moved from their original web pages and were therefore unavailable. Social Value UK have found this to be a common issue whilst maintaining the Global Value Exchange.

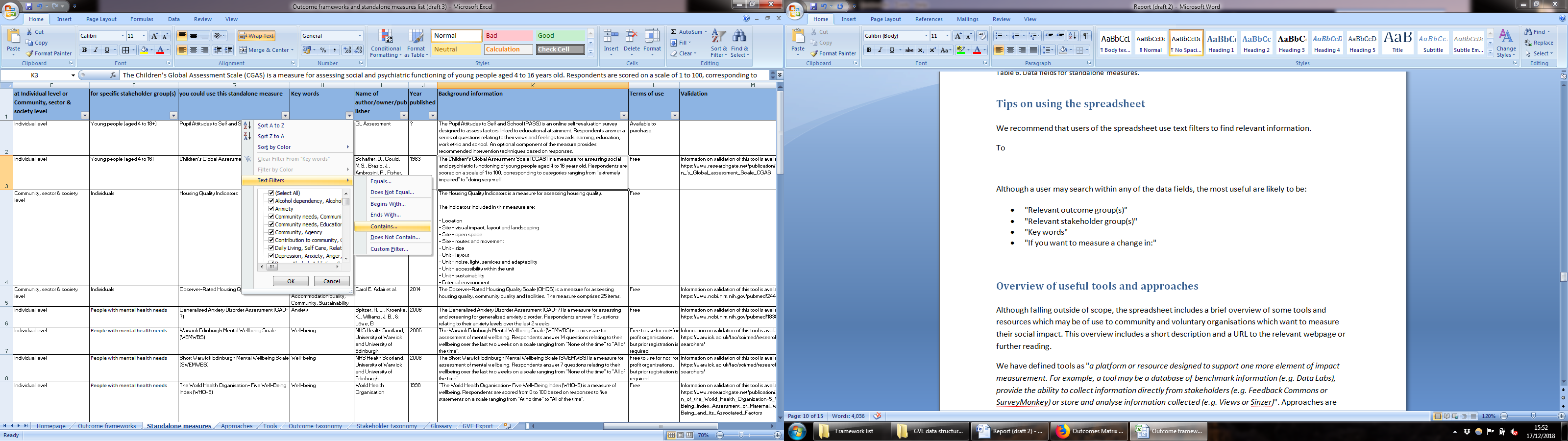
## 10.) Paywalls and licences

Another technical issue is that some standalone measures are hosted on academic journal websites behind paywalls. Similarly, some frameworks are available but carry a commercial licence arrangement.

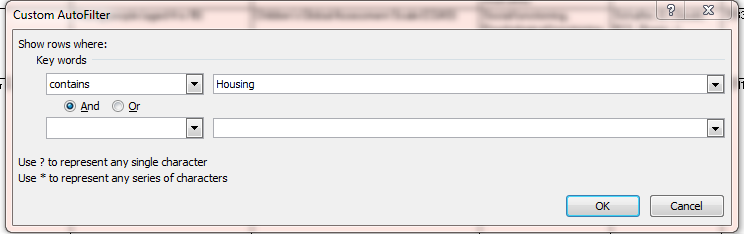
# Appendices

## Appendix A: User guide to searching the spreadsheet

We recommend that users of the spreadsheet use text filters to find relevant information. To enable this text search functionality, click on the filter dropdown button for the data field you want to search. Select "Text Filters" and "Contains..." (see below).



Clicking this will bring up the Custom AutoFilter window. The example below shows a search for "Housing". Enter your search term in the free text box and click OK.



After clicking OK, the spreadsheet now only displays rows in which the "Key words" data field contains the word "Housing".

Although a user may search within any of the data fields, the most useful are likely to be:

* "Relevant Big Society Capital outcome group(s)"
* "Relevant Big Society Capital stakeholder group(s)"
* "Key words"
* "Outcome name"

## Appendix B: Overview of useful approaches

* Social Value Principles (<http://www.socialvalueuk.org/resource/principles-of-social-value/>)
* Theory of Change (<https://knowhownonprofit.org/how-to/how-to-build-a-theory-of-change>)
* Nesta: Standards of Evidence (<https://www.nesta.org.uk/report/nesta-standards-of-evidence/>)
* Project Oracle (<https://project-oracle.com/>)
* Most Significant Change (<https://www.betterevaluation.org/en/plan/approach/most_significant_change>)
* Planning Triangle (<https://knowhownonprofit.org/how-to/copy_of_how-to-create-a-planning-triangle>)
* Social Return on Investment (<http://www.socialvalueuk.org/resources/sroi-guide/>)
* Social Accounting and Audit (<http://www.socialauditnetwork.org.uk/>)

Approaches have been sourced from the Social Value UK Resources page (<http://www.socialvalueuk.org/resources/>) and the Inspiring Impact Resource Hub (<https://www.inspiringimpact.org/resource-hub/>).

Please note that these approaches have not been endorsed by The National Lottery Community Fund and are intended to provide context only.

## Appendix C: Glossary of terms

|  |  |  |
| --- | --- | --- |
|  | **Definition** | **Example** |
| **Outcome** | An outcome is a change resulting from an activity (of any duration). This can include positive and negative changes, whether intended or unintended. We consider "outcome" to be synonymous with "impact". | Change in levels of income, Change in self-esteem |
| **Outcome group** | An outcome group or domain is a broad category into which multiple related outcomes can fall. For example, the outcome group "Mental health" could include the outcomes "change in self-esteem" and "change in anxiety levels". This categorisation by group could also be termed a taxonomy. | Income and financial inclusion, Citizenship and community |
| **Outcome framework** | An outcome framework is a set of outcomes that has been published to promote consistency of impact measurement. These outcomes may be mapped against stakeholder group, domain or organisational goal. Outcome frameworks are generally published to help one or more organisations be consistent in their reporting of outcomes. Some outcome frameworks include measures for each outcome. | The Global Goals for Sustainable Development |
| **Standalone measure** | A standalone measure provides information on how much of an outcome has happened or is expected to happen. These can be based on information provided by those experiencing the outcome (for example, using questionnaires or scales) or from other sources (for example, employment statistics). Standalone measures are those which have been published independently of an outcome framework. Standalone measures can be objective or subjective. | Warwick-Edinburgh Mental Wellbeing Scale |
| **Tool** | A tool is a platform or resource designed to support impact data collection or analysis. This could be further defined as tools that do the following:    a) provide the ability to collect information directly from stakeholders  b) provide benchmark information  c) store, visualise and analyse impact data  d) case management systems e) diagnostic self-assessments | Data Labs, Sinzer, SROI Self-Assessment Tool |
| **Approach** | Approaches are methodologies or guides relating to impact measurement. Rather than a specific scale or measurement tool, an approach frames the analysis or actions being taken in practice. | Social Return on Investment, Social Audit |
| **Stakeholder** | Stakeholders are people, organisations or entities that experience change, whether positive or negative, as a result of the activity that is being analysed. | People with mental health needs |
| **Beneficiary** | The intended recipients of an outcome. Beneficiaries are a sub-group of stakeholders. | Recipients of life-skills training |
| **Validated** | A measure is validated when it has undergone a process of verification or testing to determine its accuracy. Validation may be undertaken by the original authors/publishers as part of the development of a measure, or conducted at a later date by a third party. |  |

## Appendix D: About Social Value UK

Social Value UK (SVUK) is a membership organisation for anyone interested in measuring, managing and maximising social value. We are a social enterprise[[2]](#footnote-2) based in Liverpool and operating across the UK. We were established in 2008 (formerly known as The SROI Network) and in 2015 we became the affiliated national chapter of Social Value International[[3]](#footnote-3). We have a turnover of approximately £450,000, a small dedicated staff team (six full time and two part time) and we are constitutionally owned by our members.

Social Value UK’s membership comprises over 400 individuals and about 60 organisational members. Our members represent a body of practice across all sectors (private sector, public sector, third sector, and academia). We are united by our aim to reduce inequality and environmental degradation and to increase wellbeing. We believe this can be achieved by changing the way the world accounts for value.

Social Value UK have a ten-year track record of designing and delivering training in social impact measurement and management. SVUK (On behalf of Social Value International) convene members from across the world to develop technical guidance and assurance standards for social impact reporting that are consistent with the Social Value Principles[[4]](#footnote-4). SVUK also have a track record of creating online resources and delivering high quality research, some of this is mentioned in the section below on relevant experience.

### Why this work is of interest to us

*Create a reference document/list of outcomes frameworks and measures/scales that are of relevance for community and voluntary organisations to use in measuring the difference they make to beneficiaries and the communities they serve.*

This research is of great interest to Social Value UK because it aligns with our overall mission to help organisations get better at measuring social impact/value. Furthermore, we are conscious of the number of frameworks and measures that exist and the challenge this poses, especially for smaller community and voluntary organisations.

We have carried out similar exercises in the past and have listed below some relevant experience that we believe makes us well qualified to do this. It is also a good moment to carry out this research as SVUK have recently been given a key role within the next phase of Inspiring Impact project and the findings could complement our activities in this project too.

## Appendix E: About the Global Value Exchange

The Global Value Exchange (http://www.globalvaluexchange.org) is an online platform developed and owned by Social Value UK. It is designed to crowd source impact measurement measures and frameworks. We have been using the site to collect examples of stakeholders, outcomes, indicators and valuations. As of the time of writing, the database contains 32,064 entries, consisting of 3248 stakeholders, 9011 outcomes, 14,213 indicators and 5592 valuations.

The aim of the site is to be a "database of databases" for impact measurement information. As more outcome frameworks and measures are published, we add them to the site and encourage users to do the same.

Users can upload their own project stakeholders, outcomes and indicators to the website and make these publicly available via our free myGVE tool.

Users of the site are able to interact with the information. They have the ability to comment and say how they use the existing entries, providing a form of validation and guidance for users.

1. (https://www.goodfinance.org.uk/impact-matrix) [↑](#footnote-ref-1)
2. A company Limited by Guarantee (Registered in Scotland Number 322057) trading under the name Social Value Network UK [↑](#footnote-ref-2)
3. A UK registered charity; number 1142874. For more information visit: [www.socialvalueint.org](https://www.socialvalueint.org/) [↑](#footnote-ref-3)
4. <https://socialvalueint.org/social-value/principles-of-social-value/> [↑](#footnote-ref-4)