

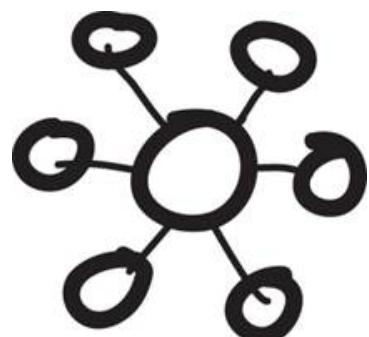


# Blueprint for shared measurement

Developing, designing and implementing shared approaches to impact measurement

March 2013

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## Inspiring Impact

**Inspiring Impact** is a programme that aims to change the way the UK voluntary sector thinks about impact and make high-quality impact measurement the norm for charities and social enterprises by 2022.

Over the next decade we will work towards five key objectives under five themes, answering the key questions for the sector:

- What does good impact measurement look like?
- How do we know what we need to measure?
- How do we **measure** it?
- **How can we compare with and learn from others?**
- What is the role of funders?

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## Foreword

When you are struggling to keep your charity afloat to help those you can see are badly in need of support, shared measurement is probably the last thing on your mind. So why are we at NPC and Inspiring Impact spending so much time on it?

The answer is simple: because it has the potential to help us all do a better job, to understand more fully what really works best, to help funders guide resources to places that can use those funds most effectively, and to help more charities work together on difficult issues, united in a view about how to measure the outcomes they all want to achieve. What may therefore look like a niche area turns out to have profound implications for the sector. Shared measurement allows organisations to understand and measure their impact, not just as individual players, but in collaboration with a number of organisations with a shared mission.

Until we can get more shared measurement into social policy—and especially the charity sector—our efforts to measure what works will be fragmented, and we may miss valuable lessons and insights from our peers.

Developing and maintaining a shared measurement approach across a number of charities, no matter how closely aligned their aims, is not an easy task. This research is the first of its kind in the UK to help us understand the steps to developing a successful shared measurement approach. We hope this will stimulate further work on shared measurement and provide guidance to those hoping to develop a shared approach themselves.

Producing this report has been all about partnership and collaboration with an excellent set of organisations. Taking shared measurement forward will demand much more of the same. But it will be worth it.

A handwritten signature in black ink, appearing to read "Dan Corry". The "D" is a large, stylized oval shape, followed by "an" and "Corry" in a cursive script.

**Dan Corry, Chief Executive, NPC**

## Acknowledgements

We would like to thank all those who supported and contributed to this research:

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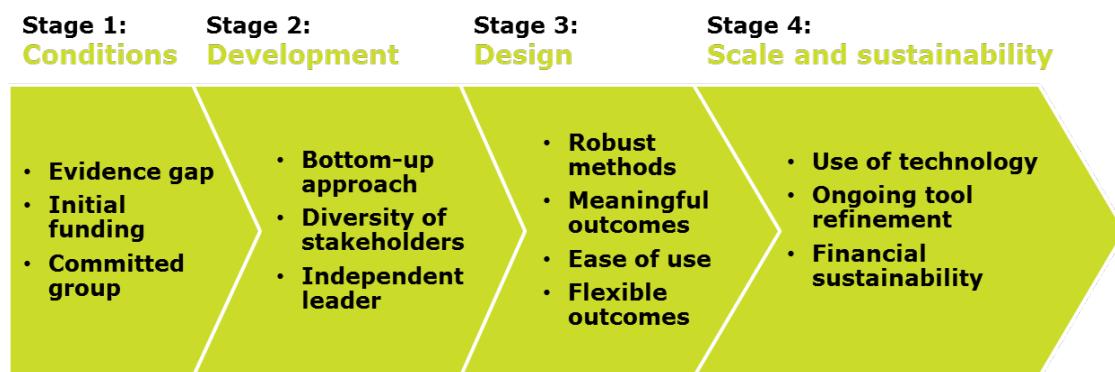
# Executive summary

Charities work to solve complex social issues—which often cannot be solved by one initiative alone, and require systemic, collaborative responses. Shared measurement can promote a systemic approach to understanding the issues we aim to tackle and help us learn what works best to solve social problems. It involves organisations working on similar issues developing a **common understanding** of what to measure and **developing tools** that can be used by charities, social enterprises and funders working towards similar goals.

Shared measurement aims to make it easier for organisations to learn from each other, save them the costs of developing their own tools, and build an evidence base of what works. It is an essential component in improving standards of impact measurement, allowing more consistency and comparability to improve the effectiveness of the charitable sector and changing more lives for the better.

## What is successful shared measurement?

This report reviews existing literature in the UK and US, and analyses 20 shared measurement projects. From this it identifies a number of factors that are key to developing successful shared measurement. These success factors look at the pre-conditions necessary for shared measurement, as well as key factors in developing, designing, scaling and sustaining shared approaches. These factors are summarised in the diagram below:



## Recommendations

There is a way to go before shared measurement becomes common practice in the charitable sector. Charities, funders and sector bodies all have a role to play:

- **Charities** should look at whether shared approaches exist in their area, think about whom they could collaborate with, and encourage their funders to support a shared measurement approach.
- **Funders** should develop shared measurement approaches to improve consistency and reduce duplication in reporting. This should involve grantees, particularly front-line staff.
- **Sector bodies** should consider the demand for shared measurement in their sectors and consider championing shared measurement approaches.

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# Introduction

Charities and social enterprises, and their funders and investors, are increasingly interested in impact measurement to ensure they are using their resources to make the greatest difference to people's lives<sup>1</sup>. With dwindling funds and an increased demand for evidence from all types of funders, impact measurement has become a priority for the sector.

NPC's 2012 impact survey<sup>i</sup> found that three quarters of all UK charities say they measure the impact of at least a small proportion of their work. However, the survey also showed that there are many barriers preventing impact measurement from being used to its full potential. Organisations report that not knowing how to decide on outcomes or where to find tools are some of the biggest barriers stopping them from measuring impact. They also cite a lack of funding for impact measurement and difficulty in analysing results. Another obstacle is different funders asking grantees for different types of information—over two thirds of funders ask their grantees for information tailored to them. Almost three quarters (72%) of charities want greater transparency and reporting of negative results.

We believe a solution to many of these challenges is shared measurement—where more than one organisation measures impact using the same approach.

## What is shared measurement?

Shared measurement is both the product and process of taking a shared approach to impact measurement. In terms of the product, shared measurement is any tool that can be used by more than one organisation to measure impact. The process of shared measurement entails understanding a sector's shared outcomes, often mapping out its theory of change. It also involves the engagement and collaboration needed to result in a shared approach.

There are a number of important issues involved in developing a shared measurement approach. Strong leadership is central to getting organisations' buy-in and sustaining the approach beyond initial development. Good collaboration is key to organisations working together to decide on shared outcomes and measures. It is also essential that a focus on impact is at the heart of the shared measurement approach and that high-quality methods are used.

The ultimate aim of shared measurement is to build information about what works in solving social problems. Having comparable and robust data on impact can help us work out the different sequences of interventions needed to tackle different social issues.

There are a number of features that are necessary for shared measurement. These features both describe what shared measurement entails and what it enables.

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<sup>1</sup> We define impact measurement as 'the set of practices through which an organisation establishes what difference its work makes.'

## Box 1: Key features of shared measurement

**Shared outcomes:** organisations using shared measurement should have consensus on the shared outcomes that their sector achieves and measure these shared outcomes using the same tools.

**Consistent methodologies:** organisations using a shared tool should use the same tools and consistent methods when measuring. This means having consistent research designs, similar sample sizes, similar analysis and consistent reporting of results.

**Focus on measuring outcomes and impact:** shared measurement should focus on measuring the difference a particular activity or organisation makes to an issue or group of people.

**Agreement around what is measured:** there should be agreement on the key outcomes in a shared measurement framework while also allowing the flexibility for organisations to pick and choose which outcomes are most relevant to their work.

**Clarity around a sector's impact:** shared measurement should involve understanding how a sector works together to solve a particular social problem. This can mean mapping out a sector's theory of change<sup>2</sup> or impact network<sup>3</sup>.

**Ability to compare:** shared measurement should allow organisations to meaningfully compare their results to those of similar organisations. This helps organisations put their impact data in context and learn about what approaches are most effective.

Shared measurement as we understand it has been developed by many different types of organisations: academic institutions, funders, government, consultancies, social enterprises, sector bodies and individual charities. This report looks at these different approaches to understand the key steps and success factors in developing, designing and implementing shared measurement.

## What is not included in this review?

This review focuses on shared measurement approaches that allow organisations to define and measure their shared outcomes. There are a number of tools and methods that have elements of shared measurement that are not included in this review as they do not feature this ability to share outcomes. We therefore exclude common tools including standardised scales, methods of analysis such as Social Return on Investment (SROI), cost-benefit analysis and Quality-adjusted life years (QALYs), impact investing standards and online data management systems or platforms. Each of these, however, is relevant to different stages of shared measurement. Standardised scales may be used as common tools once a sector has agreed on shared outcomes, different methods of analysis could be used once shared data is collected, and online platforms are essential to allow ease of use as well as sharing of data.

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<sup>2</sup> A theory of change is a tool that shows a charity's path from needs to activities to outcomes to impact.

<sup>3</sup> An impact network is a range of activities performed by different organisations that leads to a positive outcome.

## Defining shared measurement



- Think about similarities of interventions.
- Shared values, mission and goals are important to mapping out your sector.
- Good collaboration is important to this step.
- Thinking about your impact network or using a theory of change approach to clarify outcomes are useful.
- There are many common tools that have been developed elsewhere that can be used at this stage.
- Standardised scales can be used at this point.
- Organisations need to use similar measurement methods, for example similar samples, and research designs.
- They also need to use similar analyses of data—percentages, statistical testing, SROI or CBA.
- Aggregating data should help the sector understand its overall impact.
- Online platforms are important to all sharing and comparing.

**Shared measurement**

**Mapping FSG's classification of shared measurement\***

**Comparative performance systems**

**Adaptive learning systems**

\*This refers to shared measurement approaches identified by FSG in their 2009 research into shared measurement. Please see page 13 for more information.

## Why do we need shared measurement?

Shared measurement is an essential component in improving standards of impact measurement. More consistency and comparability is necessary if we are going to use impact measurement to learn about what works, improve practices and ultimately change more lives for the better. Shared measurement also reduces the duplication of effort in developing bespoke impact measurement tools for individual organisations.

But shared measurement can be a contentious issue among charities and social enterprises—those we spoke to throughout this research highlighted concerns shared by many front-line organisations. Some fear that shared measurement may force them to measure outcomes that are not relevant to their work. Some worry that shared measurement may lead to benchmarking and competition on the basis of results.

But the organisations we spoke to also told us that it is possible to find shared outcomes in a sector that are meaningful to many different organisations. They spoke about how shared measurement was essential for them to learn how to make the greatest impact in their sectors. As Victoria Hill of Co-ordinated Action Against Domestic Abuse (CAADA) put it, *'organisations need to understand what is normal for their service. For example, [CAADA's domestic violence services] can understand what level of mental health disclosure is usual and where they stand in relation to other services.'*

Our review of shared measurement highlights a number of important benefits.

- **Shared measurement saves time and resources.** It requires organisations to pool their expertise and resources to develop a measurement solution that can be used by many organisations. This avoids duplication of efforts to develop measurement, and the cost of developing measurement is borne by many organisations rather than one.
- **Shared measurement can reduce duplication in reporting** for many different funders by allowing multiple funders and grantees to use the same measurement approach.
- **Shared measurement allows a beneficiary to be tracked through multiple different services and interventions.** Referral is smoother when information about a client is collected and presented in the same way. Beneficiaries also gain from using the same approach when they move to a different organisation.
- **Shared measurement improves standards of impact measurement.** With more than one organisation using an impact measurement tool there is more transparency in the methods used and the results generated. Involving several organisations in developing a tool ensures that the result is balanced and independent.
- **Shared measurement externally validates impact data that is collected.** It involves consulting a range of stakeholders to ensure consensus on the outcomes and tools included in the approach. This means that the tool is recognised by the sector as having buy-in from funders and charities. Having an independent body develop the approach ensures the measures do not particularly favour any one outcome or activity.

- **Shared measurement helps organisations think about how their sector works together to achieve social change.** The approaches we reviewed often involved mapping out a sector's impact network or developing a theory of change. This can help individual organisations understand how their programmes lead to longer-term impact in their sector, and how their activities interact with other organisations working on similar issues.
- **Shared measurement helps us understand what works best for different social issues.** The ultimate aim of shared measurement is to build information about what works in solving social problems. Having more comparable and robust data on the impact of different programmes can help us identify trends in what leads to positive change across a number of different social issues.

## About this report

This report looks at the history and background of shared measurement and defines what we understand as shared measurement. Through analysis of 20 different shared measurement approaches, we examine how shared measurement is developed and draw lessons from this for future initiatives.<sup>4</sup>

These findings particularly examine:

- The conditions necessary for a shared measurement approach;
- Success factors in developing a shared measurement approach;
- Success factors in designing a shared measurement approach; and
- Important factors in ensuring the scale and sustainability of shared measurement.

We also look at the challenges of shared measurement and the benefits it has brought to organisations. We see this report as the first working paper of the Inspiring Impact shared measurement programme and welcome feedback and comments on what we have found.

This report will be useful to:

- **Charities** struggling to develop impact measurement, or demonstrate the impact and value of their work, which could benefit from collaborating with similar organisations.
- **Funders** keen to reduce the reporting burden on grantees.
- **Government bodies** keen to encourage better quality and more standardised evaluation in the sector.
- **Sector bodies** keen to lead the development of a shared measurement approach for their sector.
- **Think tanks, consultancies and academics** interested in the process of shared measurement.

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<sup>4</sup> For more information on our methodology, please see the appendix.

## Box 2: Glossary

**Impact:** The overall difference an organisation, programme or intervention makes. We use the terms ‘impact’ and ‘results’ interchangeably throughout this report.

**Outcomes:** The results of a programme or intervention.

**Impact measurement:** The set of practices through which an organisation establishes what difference its work makes. We use the term to define a broad set of practices that includes measuring both outputs and outcomes. This does not mean we equate measuring outputs with measuring impact—it is just part of the overall process.

**Monitoring:** A systematic way of collecting and recording information to check progress against plans and enable evaluation.

**Evaluation:** The use of information from monitoring and elsewhere to judge and understand the performance of an organisation or project.

**Theory of change:** A tool that shows a charity’s path from needs to activities to outcomes to impact.

**Impact network:** A range of activities performed by different organisations that leads to a positive outcome.

**Tool:** Any measure, questionnaire, system, indicator or evaluation method that is developed to measure impact.

For further definitions and discussion of contested terms, see [www.jargonbusters.org.uk](http://www.jargonbusters.org.uk).

## Previous research

NPC has been developing and piloting measurement approaches for the last five years, and has piloted a number of shared measurement tools. Triangle Consulting Social Enterprise in the UK has also developed a number of shared tools—known as the *Outcomes Stars*.<sup>5</sup> Few organisations, however, have reviewed shared measurement approaches to understand how they should ideally be developed. This report is the first that we know of to do this in a UK context.

Similar research has been carried out in the United States by a number of institutions. FSG, a US-based social impact consultancy, examined shared measurement approaches in the US to understand key steps in their development. The Urban Institute has also published research on developing shared outcomes frameworks. Grantmakers for Effective Organizations (GEO) also examined shared measurement approaches in its 2012 report on evaluation. This previous research in the US has looked at steps and success factors involved in shared measurement, as well as examining a number of examples.

FSG reviewed several examples of shared measurement to understand how they were developed<sup>ii</sup>, and identified three different types of shared measurement. These are:

- **Shared measurement platforms:** systems that allow many organisations to pick and choose measures for their field and collect data using web-based tools.
- **Comparative performance systems:** approaches that require all organisations in a field to report using identical measures and methods, to enable comparison and aggregation of data.
- **Adaptive learning systems:** many organisations that work on different aspects of one issue and build links between their projects and goals, establish common metrics and learn from each other on an ongoing basis.

FSG's outline of different shared measurement approaches is similar to the key features of shared measurement outlined in this report. *Shared measurement platforms* may not involve organisations collaborating to agree on shared outcomes, but it does involve the use of common tools. *Comparative performance systems* take a more streamlined approach in order to compare results, but again may not involve collaboration and ongoing learning. *Adaptive learning systems* involve shared measurement among organisations with an understanding of their impact networks and a facility to learn from the collection of shared data.

FSG looked at a number of factors that appear to be central to developing these shared measurement systems. Its research highlights the importance of issues such as leadership, engagement, use of technology and ongoing support.

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<sup>5</sup> [www.outcomesstar.org.uk](http://www.outcomesstar.org.uk)

### **Box 3: FSG's elements of success in developing shared measurement<sup>iii</sup>**

- **Strong leadership and substantial funding** throughout a multi-year development period.
- **Broad engagement in the design process** by many organisations in the field, with clear expectations about confidentiality and transparency.
- **Voluntary participation open to all** relevant organisations.
- **Effective use of web-based technology**.
- **Independence** from funders in devising indicators and managing the system.
- **Ongoing staffing** to provide training, facilitation, and to review the accuracy of all data.
- **Testing and continually improving** the system through user feedback.
- In more advanced systems, **a facilitated process for participants to gather periodically** to share results, learn from each other, and coordinate their efforts.

The Urban Institute has researched common outcomes and indicators for various types of community services.<sup>iv</sup> Its report on developing community-wide outcome indicators looks at how funders and service providers can work together to develop a common core set of indicators<sup>v</sup>. Its research outlines four stages to developing common outcomes: planning, meeting, finalising outcomes and indicators, and implementing the approach. It highlights important issues including funder support and participation, stakeholder engagement, getting consensus on outcomes and providing support during the pilot phase.

GEO<sup>vi</sup> looked at shared measurement in its 2012 report on the essentials of evaluation. It reviewed several foundations that used a shared measurement approach in their evaluation strategies. The examples show the importance of reducing the measurement burden for grantees, engaging with grantees, providing support, enabling grantees to exchange information and engaging multiple funders in an approach.

### **Box 4: NPC's work on shared measurement**

NPC has been trialling a number of approaches to shared measurement in the past five years. Our work to develop shared measurement approaches includes NPC's Well-being Measure, a framework for shared measurement in the NEETs sector<sup>vii</sup>, a framework for shared measurement for charities working to improve prisoners' family ties<sup>viii</sup> and the development of a shared measurement framework for the local Mind network.

NPC's Well-being Measure<sup>6</sup> is an easy-to-use online tool that can be used by charities to measure change in soft outcomes for children and young people. It has been validated through more than three years of research and testing. Currently more than

<sup>6</sup> For more information, see [www.well-beingmeasure.com](http://www.well-beingmeasure.com)

50 charities use the online tool. This enables them to automatically analyse results and generate reports.

NPC's work to develop shared measurement frameworks in the areas of prisoners' family ties, NEETs and for the local Mind network used a theory of change approach to map out common outcomes for a group of charities. These projects brought together charities and funders to develop shared approaches to impact measurement across their area of work. NPC then developed different measurement options for agreed common outcomes and piloted tools in the field.

## Key findings

Several important findings emerge from these previous studies, forming a starting point for this research. A number of common themes seem to be important for shared measurement:

- **Engagement of multiple stakeholders:** the majority of examples reviewed by previous studies discuss the importance of engagement, particularly with funders and charities.
- **Easy-to-use systems that do not burden charities:** many of the examples talk about ensuring measurement is streamlined with organisations' practices and does not unduly burden staff.
- **Use of technology:** most of the examples in previous studies have made use of bespoke software or web-based solutions to enable efficient data collection and sharing results.
- **Strong leadership:** FSG identifies strong leadership as key to ensuring the ongoing development and implementation of shared measurement. This leadership may come from a backbone organisation that can coordinate participation by a variety of others.
- **Ongoing support from funders:** all the previous research talks about the need for ongoing support and training in using the tools, interpreting results and sharing with other organisations.
- **Continuous refinement and improvement of measurement systems:** FSG highlights the importance of continuous refinement in its review of shared measurement examples.

NPC's review of shared measurement builds on the findings of these previous studies and explores these issues in the context of the UK charity sector.

Findings from previous research were incorporated into a framework to guide and structure the research in this report. We used this framework to assess whether similar themes from previous research were present in the shared measurement approaches we reviewed.

# Developing shared measurement

The process of developing shared measurement cuts across a number of complex issues affecting the charity sector. Many of the themes we see in developing shared measurement are broader issues—for example, good collaboration, good leadership and high-quality impact measurement. Our findings address the steps that shared measurement approaches have taken to address these issues.

The approaches reviewed have been led by many different types of organisations. Some approaches have been driven by funders, some by charities or social enterprises. Some have been led by sector bodies while in other instances, consultants and think tanks have taken the lead. We have looked at a number of these initiatives to understand the success factors in developing shared measurement. Our review of 20 different shared measurement approaches highlights:

- The importance of having the right conditions in place before starting a shared measurement process.
- The importance of developing and designing a successful development process.
- The importance of thinking about the scale and sustainability of shared measurement.
- The challenges of taking a shared measurement approach.

## Summary of success factors

The following factors emerged from our interviews with developers as key to developing a successful shared measurement approach. These factors fall into four different stages, which are discussed in the following section:

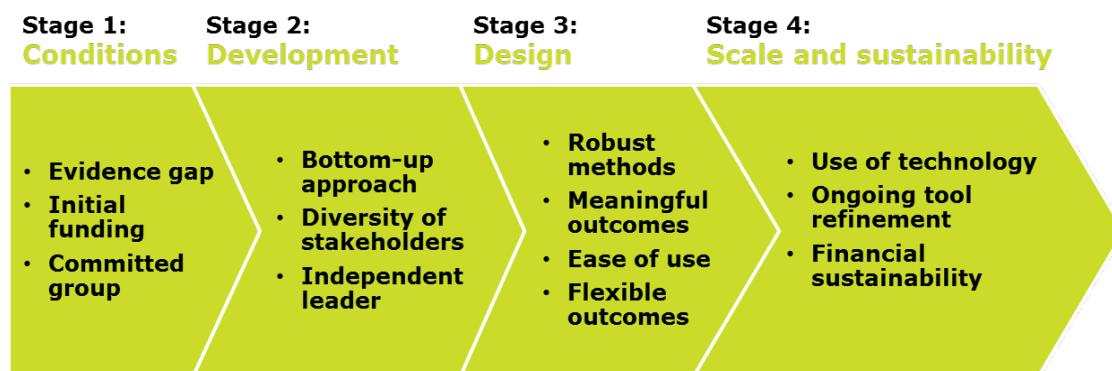


Figure 1: Success factors for developing shared measurement

## Box 5: Who we interviewed

### Sector body-led approaches

- **CAADA** for its work on developing the *Insights* tool—a shared monitoring system for Independent Domestic Violence Advisors (IDVAs).
- **The National Children's Bureau Child Bereavement Network** for its work on developing standardised scales to measure the impact of child bereavement services.
- **NCVO** for its work on the *Value of Infrastructure Programme* (VIP)—a set of shared tools for infrastructure bodies to measure their impact.
- **Bond** for its work on the *Improve It* framework—a shared toolkit for international development organisations to measure the impact of their work.

### Think tank, academic and consultancy-led approaches

- **Triangle** for its work on the *Outcomes Stars*.
- **The Young Foundation** for its work on the *Catalyst* framework of outcomes for young people.
- **Personal Social Services Research Unit (PSSRU)** for its work on developing the *ASCOT tool*—a toolkit to measure outcomes of adult social care.
- **NPC's Well-being Measure**.
- **NPC**'s work on shared measurement framework for the NEETs sector.
- **NPC**'s shared measurement framework for charities working to improve prisoners' family ties.

### Charity-led approaches

- **Home-Start** for developing the *MESH* tool, a shared system for local Home-Starts to measure the impact of their work.
- **Citizens Advice** for its work on developing a shared outcomes and indicators framework for local Citizens Advice Bureaux to measure the impact of their services.
- **Mind** for leading an approach to develop a shared measurement framework for its local Mind network. NPC worked on developing this framework for Mind.

### Funder-led approaches

- **Community Evaluation Northern Ireland** for its work on developing a common outcomes framework to measure the impact of a BIG Lottery community grants programme.
- **Youth Music** for its work on developing a common set of evaluation tools for youth music organisations to evaluate their impact.
- **York Consulting** for its work on developing the *Family Pathfinder* system for the Department of Education—an online tool for local authorities to assess risk and resilience factors within families.

- **Substance** for its work on developing a common outcomes framework for the BIG Lottery *Realising Ambition* programme.
- **Substance** for its work on developing a shared measurement approach for *Sports for Development*.
- **The Football Foundation** for its work on the **Upshot tool**, an online application that allows project staff to manage, monitor and collect data on outcomes for community projects.

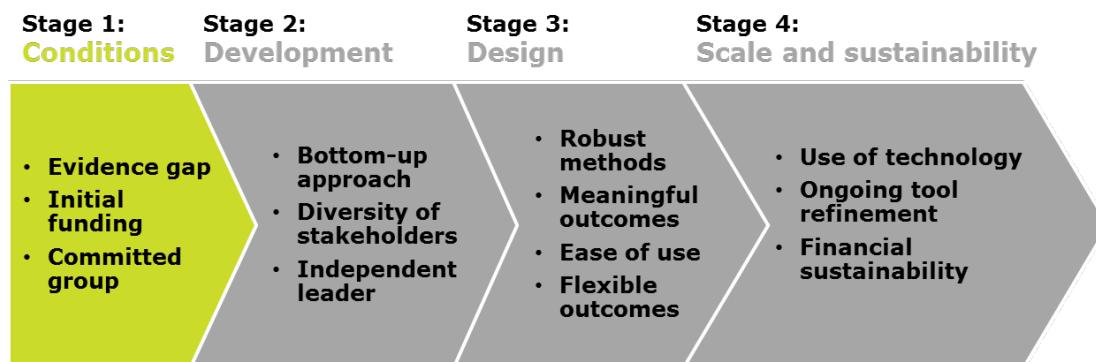
We also included two approaches in our review that have been established for a number of years. Because these approaches are quite established, it was not possible to interview the original developers. These approaches are:

- **The CORE (Clinical Outcomes in Routine Evaluation) system**—standardised scales and bespoke software that measure the outcomes of counselling and psychotherapy.
- **The Asset tool**—a standardised questionnaire used by the Youth Justice Board to assess risk and resilience factors among young offenders and to track improvements.

A full list of these shared measurement examples as well as other examples can be found in the appendix.

# Shared measurement success factors

## Stage 1: Conditions



Our research identified a number of common themes that underlie the development of a shared measurement approach. These themes are often conditions that are in place before development begins. The most common theme across our research was the development of shared measurement in response to a gap in evidence for a particular sector.

### Evidence gap

***'Without the appropriate tools, the network could not evidence the difference it was making.'***

**Child Bereavement Network**

The majority of organisations we explored had come to a shared measurement approach due to a lack of appropriate evidence in their sector. This was either a lack of evidence connecting activities to long-term outcomes, or a lack of sensitive measurement tools. Shared measurement was chosen as the solution to this lack of evidence. Joy MacKeith from Triangle told us that one driver for the development of its homelessness star (see case study on page 31) was the London Housing Foundation's view that interest in outcomes was growing, and that the homelessness sector needed to up its game in response. *'They recognised that outcomes were coming onto the scene and wanted to equip the sector to respond and take the initiative.'*

Similarly, Bethia McNeil from the Young Foundation explained that a crucial incentive in the development of the *Catalyst* framework of outcomes for young people was the lack of evidence connecting youth work with harder cost-saving outcomes, such as moving into employment or reducing reoffending. *'There was a disconnect between long-term outcomes and what young people and youth organisations valued and felt they achieved.'*

The lack of any appropriate or sensitive tool to measure improvements in children affected by bereavement was the main incentive in the development of NCB's Child Bereavement Network tool (see case study on page 32), according to Alison Penny: '*most of the tools were developed for children with mental health difficulties, but who had not been bereaved. Even though these symptoms might be similar, bereaved children have very different needs, which these tools were not picking up on. Without the appropriate tools, the network could not evaluate the difference it was making.*' The development of new questionnaires tailored to bereaved children is intended to bridge this gap and provide the network with the evidence it needs to show the difference it is making and understand what works best.

## Initial funding

***'Our funders recognised that what we were doing was new and so were very flexible and open about how it went.'***

CAADA

Initial support from funders is crucial to allow a shared measurement approach to get off the ground. All the approaches we reviewed had received committed funding for a number of years to develop and pilot their tools. The majority had funding from a number of different sources which increased the projects' stability.

For example, Bond had committed funding from the Department for International Development, as well as a number of NGOs, before it started to develop its *Improve It* framework (see case study on page 33). NCB had committed funding from several sources—it received grants from two grant-making trusts as well as funding from the Department of Health. Similarly, CAADA's funding for the *Insights* tool lasted over a number of years (see case study on page 34). Victoria Hill from CAADA told us, '*our funders recognised that what we were doing was new and so were very flexible and open about how it went.*'

## Committed group

***'Having a small group of very engaged people with strategic freedom was key to success.'***

Triangle

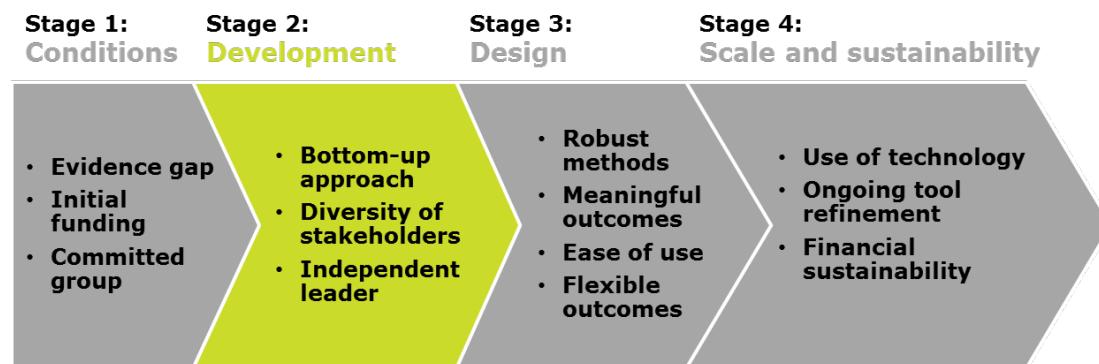
The majority of approaches we reviewed had engaged a number of committed individuals or organisations before developing shared tools. In some cases, identifying and engaging organisations and individuals was a formal stage before developing tools. But for some organisations we spoke to, this stage had happened organically.

For example, Joy MacKeith from Triangle told us how a number of champions and advocates were central to getting the *Outcomes Stars* off the ground. '*We didn't identify a steering group at the outset of the process, but the tools wouldn't have happened without a number of key committed organisations.*' An organic approach to engaging organisations was important to the *Outcomes Stars'* development—'*Many of these champions and advocates*

*approached us to develop versions of the stars. This means that they really believe in the potential of the tools.'*

This approach was similar to the development of Bond's *Improve-it* framework. As Rob Lloyd, former head of effectiveness at Bond told us, '*we decided to go with where the energy was; we worked with a core group before trialling the approach with other organisations.'*

## Stage 2: Development



Our review highlighted a number of factors key to successfully setting up and developing a shared measurement approach. These factors help to ensure the approach is meaningful to the sector, and also sustainable. Taking a bottom-up approach and engaging front-line staff, senior management and funders in the development phase is crucial. Having an independent leader to drive the process also seems to be a strong success factor. This leader needs to be able to balance the demands of charities and funders, and promote the approach once it has been developed.

### Bottom-up approach

**'We worked primarily with the front-line workers and managers of services.'**

#### Triangle

Most of the shared measurement approaches we reviewed ensured that design and development were led by those working in the sector. While lead organisations' methods differed, in general they allowed outcomes to be fed into a tool through a bottom-up process—allowing practitioners and front-line organisations to specify the outcomes important to them, rather than imposing pre-selected outcomes on the sector. Most then supplemented these through reviews of the academic literature, or consultation with funders and commissioners. But allowing those working in the field to specify outcomes important to them first was key.

Triangle took a decidedly bottom-up approach when developing the *Outcomes Stars*. Joy MacKeith told us that in the early development stages, '*staff felt that most tools were not related to their 'real work' and did not accurately represent their achievements. To develop*

*the star, we worked primarily with front-line workers and managers of services—and in later iterations, service-users themselves.'*

A balance must be struck between taking a bottom-up approach and maintaining some coherency around outcomes. Substance faced the challenge of balancing consultation and coherence whilst developing the *Realising Ambition* framework (see case study on page 35). Neil Watson , director of external relations at Substance who worked on developing the framework told us: initially '*we got an overload of disparate information, which would have been impossible to include in a shared outcome framework, so instead we developed a longlist of potential outcomes and consulted with grantees on what to prioritise.*'

## Diversity of stakeholders

***'We had a very strong advisory group made up of funders, sector bodies and front-line organisations.'***

**Young Foundation**

Including a diverse range of stakeholders in the development of a shared measurement approach is key. From practitioners using the tool with service-users, to funders using it to monitor the impact of a grant, involving a wide group was a consistent theme in the approaches we reviewed.

The Young Foundation ensured a mix of stakeholders, including young people, was involved throughout the design of its outcomes framework. Bethia McNeill told us, '*we had a very strong advisory group made up of funders, sector bodies and front-line organisations. We held several focus groups with young people, commissioners, front-line organisations and investors.'*

The Child Bereavement Network also engaged a number of relevant stakeholders working in the area, according to Alison Penny: '*we took a very adaptive iterative process to developing the tool, we had feedback from all groups and revised the tool in iterations. We set up six focus groups with practitioners, one with funders, two with parents and four with young people.'*

It is worth noting that many of the developers we spoke to cautioned against the risks of too much consultation—for example, losing a grasp over priority outcomes by trying to include too many things, or trying to make the shared measure a solution to every measurement need of the organisations involved. Therefore while it is important to include a diverse range of stakeholders, developers need to be mindful of the optimum number to engage.

## Independent leader

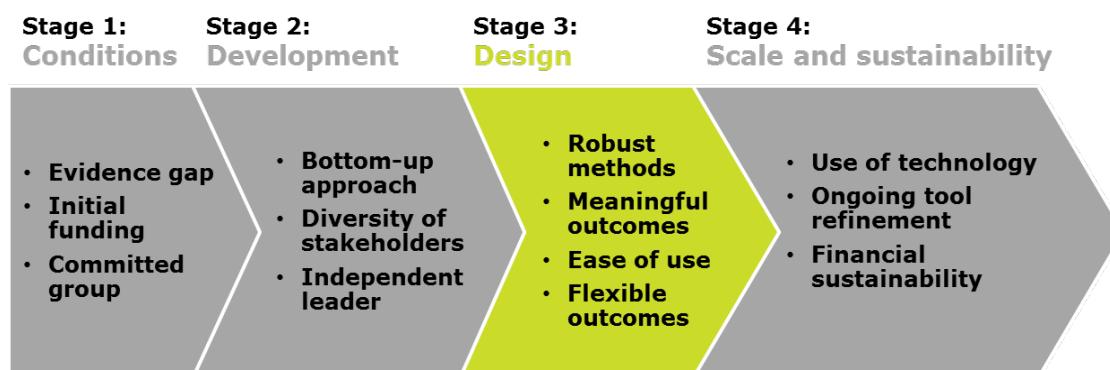
***'Someone needs to hold that independent perspective, a bigger-picture agenda.'***

### Triangle

In the majority of approaches we reviewed, the development of shared measurement was led by an organisation perceived as independent by the sector. This meant it was better able to balance the demands of charities and funders, and promote use of the approach following its development. In most cases, development was led either by a sector body, an academic institution, a think tank or consultancy or a national charity on behalf of a local network of charities. In successful cases, the independent leader tends to have a sense of ownership of the approach, and continues to promote its use. As Joy MacKeith from Triangle found, *'it's critical to have an organisation in place to provide ongoing support and development of the tool.'*

In Bond's case, its independence was important, as Rob Lloyd states: *'being a sector body was important. It opened doors. You need trust and reach.'* An independent body is also important to bring funders on board and encourage them to use shared measurement without biasing their attitude to funding. This means that ideally the developer of shared measurement should not be a user of the final tool. Balancing the demands of the sector and promoting use of the tool would have a negative bias if the developer was also attempting to use the tool or fund on the basis of the tool. *'Someone needs to hold that independent perspective, a bigger picture agenda,'* sums up Joy MacKeith from Triangle. *'Saying no is part of the process. What's best for an individual is not always best for the sector.'*

## Stage 3: Design



A number of themes were identified as key to designing a successful shared measurement tool. The outcomes measured by the tool need to be meaningful to all stakeholders: front-line staff, senior management, investors and funders. There needs to be a level of flexibility in the framework—where organisations may choose from similar sets of outcomes, but do not necessarily measure identical outcomes. To ensure the tool collects high-quality data,

robust methods need to be used. It is also important that the tool itself is accessible and easy-to-use, both for front-line staff collecting data and beneficiaries responding to questions in the tool.

## Robust methods

***'We applied a standard tool to enable organisations to measure their progress.'***

CENI

It is essential that the tools used in shared measurement are robust and stand up to external scrutiny. The approaches we reviewed followed best practice when developing their tools where feasible. The Child Bereavement Network, for example, is extensively testing questionnaires it has developed to measure the impact of child bereavement services, to ensure they measure the outcomes intended, and that they are sufficiently sensitive to monitor change.

Community Evaluation Northern Ireland (CENI) established baselines and used distance-travelled techniques to develop its *Measuring Change* approach. They used this approach to develop a common outcomes framework for a BIG Lottery Fund community grants programme. Brendan McDonnell, CENI's director, explained the pilot, which involved three steps. First, CENI reviewed commonly occurring project outcomes and rationalised theories of change from different programmes, allowing it to develop a common outcomes framework. CENI then held sessions with project stakeholders to estimate their baseline and progress against this framework using a distance-travelled technique. Finally, CENI analysed quantitative and qualitative data to estimate individual projects' progress, and aggregated this to indicate programme impact. Brendan McDonnell explains, '*we first got the funder to articulate their theory of change, to produce a common outcomes framework for the programme. We then applied a standard tool to enable projects to estimate their progress against these outcomes.*'

## Meaningful outcomes

***'There's no point in developing robust tools if you don't bring along organisations.'***

Bond

The majority of outcome areas included in any shared measurement approach need to be relevant to all stakeholders. This includes beneficiaries, front-line practitioners, charity staff and funders. Involving a diverse range of stakeholders and making sure that outcomes reflect on-the-ground experiences of front-line practitioners will go some way to achieving this. However, before any outcome is finalised, developers need to ensure consensus among different stakeholders that outcomes are meaningful.

Rob Lloyd from Bond spoke to us about the importance of getting buy-in while developing the *Improve-It* toolkit. *'It was necessary to do a lot of consultation. People need to feel comfortable with where you're going. There's no point in developing robust tools if you don't bring along organisations. That's why buy-in is so important.'*

Home-Start UK's MESH (Monitoring and Evaluation System Home-Start) tool for local Home-Starts was developed in part thanks to Home-Start's experience of using tools that were not necessarily reflective of the outcomes it was achieving for all its service users when offering a universal access support service. Elizabeth Young, director of research, evaluation and policy at Home-Start UK, told us how the charity developed its system based on outcomes fed in from local Home-Starts through consultation. This ensured that outcomes measured were meaningful to families and front-line practitioners, as well as wider audiences.

### Ease of use

***'It is essential that a tool is aligned with the case management process, so it is not a burden on the practitioner.'***

**CAADA**

Creating a simple and easy-to-use tool is essential, and is often the most difficult aspect to get right. Many of the organisations we interviewed spoke about the challenge of ensuring the shared measurement approach was complex enough to be relevant to the many different activities of different organisations, but also simple and straightforward to use. There are two issues to address to make a tool accessible.

First, the tool must be easy for front-line staff to use, and integrated with their day-to-day work. A key priority for CAADA's *Insights* tool was ensuring it fitted with front-line practitioners' existing case management process so that it didn't become an additional burden.

Second, the tool must be accessible to service-users. The approaches we reviewed avoided jargon and used simple language where possible. Phrasing questions in the language of the service user is essential—as Alison Penny from the Child Bereavement Network told us, '*we tried to use simple terms and plain language, we also used images on the children's questionnaire to improve its accessibility.'*

### Flexible outcomes

***'Citizens Advice offers a list of suggested outcomes, and bureaux are allowed to choose their own.'***

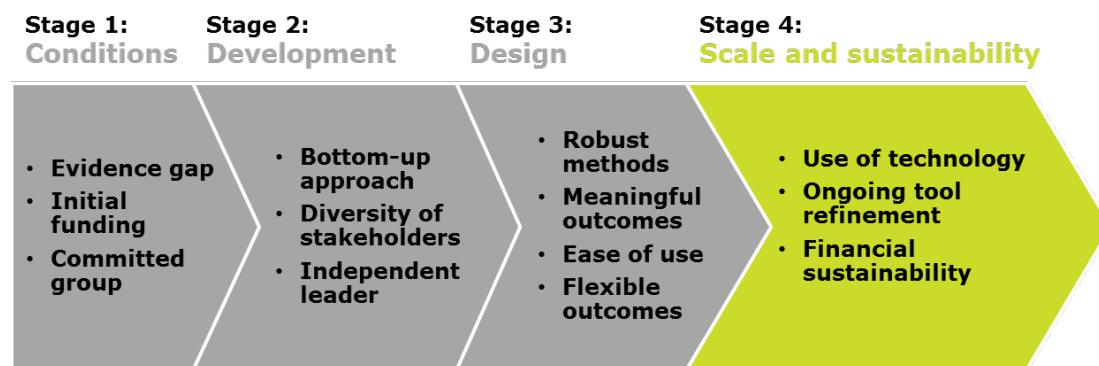
**Citizens Advice**

A degree of flexibility in the shared measurement tool emerged as a consistent theme in the approaches we reviewed. Striking the balance between standardisation and flexibility is a challenge, and most of the approaches we reviewed dealt with it by allowing organisations

flexibility in choosing outcomes, but limiting the measures in place once outcomes had been chosen.

For example, the Young Foundation was not very prescriptive in its use of outcomes in the young people's framework—Bethia McNeill told us that '*users can select clusters of outcomes that may be relevant. What we have is a common set of steps, rather than totally identical outcomes and methods.*' Similarly, Tamsin Shuker from Citizens Advice told us how allowing for flexibility in their system is crucial given the diversity of local Citizens Advice Bureaux (see case study on page 36). '*Each bureau has different funders, and hence different requirements. What Citizens Advice offers is a list of suggested outcomes and bureaux are allowed to choose their own. In total, 700 outcome codes are offered, though in practice rarely more than 15 are applied at any time.*' Bond also spoke about the risk of being inflexible. The Bond approach identified shared outcome areas, and broke these into smaller thematic groups before looking at indicators to map onto outcomes. As Rob Lloyd said, '*you can't be too prescriptive, we've gone for having baskets of outcomes and indicators first.*'

## Stage 4: Scale and sustainability



Many of our examples are at the stage where they are attempting both to scale up, and remain sustainable. Our research identified a number of common themes that interviewees referred to when thinking about these issues. Incorporating the use of technology seems to be key to scaling up, whether through a bespoke software system or an online platform. All developers spoke about the need to constantly refine the tool and respond to feedback from users. Sustainability is also a concern. Some approaches have begun to charge a minimal fee for the tool to cover costs, while others are considering pricing strategies. Long-term funding is key to allow time and flexibility to refine and pilot the tools.

### Use of technology

***'A software solution is essential, this is the point where all organisations struggle.'***

**Triangle**

It is essential to incorporate measurement into a technology platform, for ease of use and access, but also to allow organisations to easily compare results. The more mature shared

measurement approaches we reviewed have all developed some sort of software or online platform to enable users to access the tool. Triangle has developed a tailored software system<sup>7</sup> for organisations to use the *Outcomes Stars* online. Joy MacKeith sees a software solution as ‘essential. *This is the point where all organisations struggle—we never had plans to develop software for the tools, but did because IT was a real barrier.*’

Many tools we reviewed have not yet reached the point of incorporating the use of technology—but most agreed that this was the next step they need to take to achieve scale.

### **Box 6: Online platforms for shared measurement**

The technology needed to enable shared measurement is still a developing area. There are a number of notable online platforms that have been developed to allow charities to better manage their data, including data on outcomes and impact. These platforms could also be used to enable shared measurement.

- **Substance** has developed **Views**, an online project management and impact reporting platform, which allows users to record details about service users and project activities, as well as collect different types of evidence and information on impact.
- **The Football Foundation** has developed the **Upshot tool**, an online application that allows project staff to manage, monitor and collect data on outcomes for community projects.

The availability of appropriate technology is key to making shared tools more user-friendly, and data more accessible. This area is being explored by Substance as part of its research on data, tools and systems for *Inspiring Impact*.<sup>8</sup>

### Ongoing tool refinement

***'There is a need for continuous refinement of the system as the environment is constantly changing.'***

**Citizens Advice**

The need to continually refine tools and respond to feedback from the sector emerged as a consistent theme in our review. The Child Bereavement Network is already planning a refinement stage even though it is still piloting its tool: ‘*Refining the tool is essential, this is one of its key objectives,*’ says Alison Penny. Citizens Advice also spoke about the importance of ‘*a flexible evolving system.*’ In its tool, Tamsin Shuker explains, ‘*revision of outcomes takes place every six months. There is a need for continuous refinement of the system as the environment is constantly changing.*’

### Financial sustainability

<sup>7</sup> [www.staronline.co.uk](http://www.staronline.co.uk)

<sup>8</sup> For more information, see [www.inspiringimpact.org/our-plan/data-tools-and-systems](http://www.inspiringimpact.org/our-plan/data-tools-and-systems)

**'You need a business model, you will always need ongoing refinement, and therefore investment.'**

**Triangle**

Committed funding for a number of years to support the scaling up of and ongoing refinement of an approach is essential. Most of the approaches we reviewed had received funding for a period of three to five years to support a tool's development and pilot. The Child Bereavement Network's tool has three-year funding from a grant-making trust, as well as funding for a five-year PhD. CAADA received funding from a number of grant-making trusts to fund the initial development of *Insights*, and hopes to fund the expansion of the tool in the same way.

That said, a number of tools do not have long-term funding—something each developer saw as a barrier to scaling the tools. In most cases, the approaches need additional funding to develop online platforms or tailored software. Without this initial investment, developers will struggle to scale up the tools. Without this scale, the tools cannot generate earned income to remain sustainable. Committed funding is needed to bridge this gap from concept to sustainability.

Financial sustainability of the tools is likely to involve a pricing strategy to cover costs. Many of the approaches we reviewed have already developed a marketing and pricing strategy to ensure their tools' growth. To generate income for its Value of Infrastructure Programmes (VIP) tool, which measures shared outcomes for infrastructure bodies, NCVO charges a basic fee for organisations to be trained in its use.

Triangle is scaling its *Outcomes Stars*, which are free to download and use to ensure widespread uptake, but charge a fee for use of online software. This is necessary to cover the ongoing cost of maintaining the tool and funding any development. '*You need a business model*,' says Joy MacKeith. '*Of course there is a difficulty between making the tools free and the need for sustainability, but you will always need ongoing refinement, and therefore investment.*'

# Challenges

Our analysis explores a number of factors key to successful shared measurement. But there are also a number of challenges to overcome. Our interviewees spoke about the importance of addressing a number of difficult issues when developing their approaches:

- **Sceptical attitudes.** Many organisations do not think their results can be compared. Our research shows that results from different organisations must be compared carefully, with close attention paid to interpretation. This avoids misleading benchmarking, and instead allows careful contextualisation of impact data.
- **Lack of shared values.** To successfully develop shared measurement, a sector or similar organisations must hold similar values. This requires a consensus around what a ‘good’ outcome is for the sector.
- **Data protection issues.** We have a way to go before there is an open data culture in the social sector. This is changing as new legislation allows data to be shared in ways that allow organisations to share without risking the anonymity of those they work with.
- **Aligning approaches with existing systems.** This depends on how mature a sector is with regards to its measurement. Where there has been a lot of investment in measurement, it may be more difficult to introduce a shared measurement approach as organisations may be using a previously developed system. Understanding how to align a measure with what is already in place is key to developing shared measurement.
- **A lack of availability of software.** Many organisations we spoke to found it difficult to find the right software solution for shared measurement. This does seem to be changing, and with an increasing focus on impact measurement in the sector, there have been new developments on the software side. This is still an area in need of investment.
- **A struggle to gain support from funders and commissioners.** It is still difficult for organisations to get support from funders for this type of work. Through reporting requirements, funders play an important role in determining the kind of impact data collected—funders investing in shared measurement could make this reporting more efficient for grantees. NPC’s recent impact survey showed that two thirds of funders ask their grantees for information tailored specifically to them. Funders also play a key role in funding shared measurement projects.
- **Challenges in striking a balance.** Shared measurement must strike a balance between meeting organisations’ individual needs and remaining a valuable standardised tool. It may not fulfil all the measurement needs of an organisation, but is an important part of putting results in context. When developing approaches, organisations must understand and accept the distinction between their needs and what is important to measure as a sector.

- **Communication and dissemination of tools.** Most developers told us that dissemination and communication of their tools was the most difficult step. To get a high uptake, shared measurement needs to be communicated and publicised in the sector.

## Summary

Shared measurement has significant potential to bring about more efficient, consistent and collaborative measurement among charities and social enterprises. Our research identifies a number of key stages and success factors in developing shared measurement.

Balance is a theme that runs throughout the different stages and success factors. It is essential that developers strike the balance between actively recruiting organisations to be involved, and ensuring they follow the sector's lead. There is a balance to strike between a bottom-up approach and ensuring funders agree on what is measured. There is a tension between engaging a diverse range of stakeholders and making sure not to over-consult. There is a tension between ensuring tools are shared and standardised, but also allowing enough flexibility; and between developers wishing to scale the tool, but charging for its use to cover costs.

Tensions like these are inevitable in a complex process like shared measurement. The potential benefits make it worth working to find this balance, and many of the organisations profiled here show that it can be done successfully, and serve to provide inspiration for others.

# Case studies

## Case study: Triangle's Outcomes Star Scaling up a successful shared measure

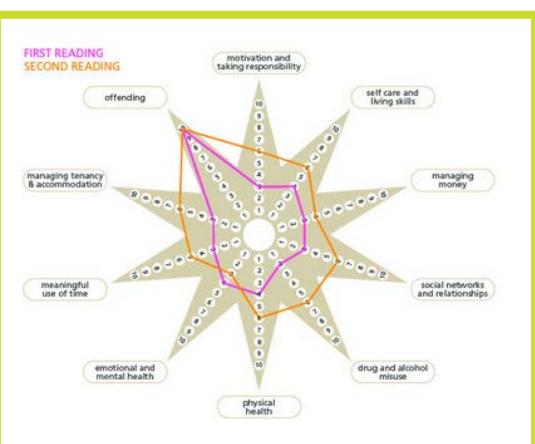
Triangle's widely-used *Outcomes Star* is one of the sector's best-known shared measurement systems. Almost 20% of the homelessness sector uses the Homelessness Star, and there are 15 other versions, carefully adapted for different client groups and services including older people, people with mental health problems, and vulnerable families.

A decade ago, Triangle was commissioned by UK-based homelessness charity St Mungo's to develop an outcomes measurement system. Extensive consultation took place with front-line staff and service users, overseen by a working group of managers. '*We had a lot of freedom and flexibility to innovate rather than working to a rigid brief,*' says Joy MacKeith, co-director and co-founder of Triangle. After piloting at St Mungo's the tool was tested and modified in other agencies, supported by the London Housing Foundation (LHF).

It became clear that the tool was applicable across the sector, and in 2006 Triangle created the first version of the *Outcomes Star*, published by LHF as a sector-wide tool. Over time, the *Star's* potential in other sectors became apparent—in 2007 the Mental Health Providers Forum commissioned Triangle to develop the *Recovery Star*. A bottom-up approach was crucial to development: '*People mostly use the Star because they think it makes sense for them and is helpful, rather than because it has been imposed from above. A lot of the time they use it because it positively helps their work with service users—the outcomes information is a bonus.*' After four years Triangle developed the *Star Online*, a web-based system for completing and analysing *Star* data. Interestingly, Joy says, '*We hadn't planned to develop software, but did because so because IT was a real barrier.*'

Strong leadership played an important role in creating and managing a suite of sector-wide tools. '*Someone needs to hold that independent perspective, a bigger picture agenda,*' says Joy. '*Organisations often want to tweak the tool to fit their needs, but you lose consistency, comparability and risk undermining the quality of the tool, so saying no is part of the process. What's best for an individual organisation is not always best for the sector.*'

Partnerships have been key to the *Star's* success, with versions funded by the Department of Health, BIG Lottery Fund, and Nesta, among others. Benchmarking and comparing results, however, remains a contentious issue: '*you need to have confidence in your data to benchmark,*' says Joy. '*You should never treat the data as the final answer on service effectiveness. We always say that it helps people to ask better questions.*'



The paper version of the tool is available for organisations to download and try for free. '*This has really helped with widespread adoption,*' says Joy. But to ensure financial sustainability, Triangle is charging fees for training, the online tool, and the incorporation of the tool into an organisation's own IT and paperwork.

## Case study: Childhood Bereavement Network (CBN)

### Measuring relevant outcomes

The Childhood Bereavement Network is the hub for organisations and individuals working with bereaved children, young people and their families across the UK. Part of the National Children's Bureau, it is currently piloting standardised pre- and post-questionnaires for its members to use with the children, young people and parents they are supporting, to help them measure impact in a more meaningful way.

The initial impetus for the framework came from research carried out by Dr Liz Rolls at the University of Gloucestershire, looking at evaluation activity in the child bereavement sector. This research highlighted that although significant time and resources had been spent on evaluation in the sector, there was a lack of tools measuring appropriate and relevant outcomes<sup>ix</sup>. It recommended collaboration in the field to develop a common 'core' outcomes framework across the sector, and determine ways to measure these outcomes.

CBN secured initial funding from the Department of Health to develop the framework and propose measurement tools. CBN coordinator Alison Penny aimed to include as broad a group of stakeholders as possible in developing a theory of change framework. All 250+ CBN members were invited to take part, as well as groups of children, young people and their parents. '*Maintaining diversity of participants was crucial,*' says Alison. '*We set up six focus groups with practitioners, one with funders, two with parents and four with young people.*'

The focus groups helped identify the outcomes different stakeholders considered critical for child bereavement services to be working towards. Alison notes that '*grouping the outcomes into sub-groups proved tricky . They are interconnected and many contribute to one another.*' Once the outcomes were identified, CBN realised they needed to develop their own tools to measure indicators of change in areas specific to child bereavement services.

The development process was iterative and took just over a year, including two consultation rounds with focus groups and several drafts. CBN ensured that questions were asked in plain English: '*We tried to use simple terms and plain language,*' says Alison, '*and we used images on the children's questionnaire to improve its accessibility.*' The final questionnaires will be tested for reliability and validity to ensure questions are robust and sufficiently sensitive. CBN will invite organisations from its membership to participate in this pilot in early 2013.

Once the pilot is complete, training to use the questionnaires will be rolled out. Participating organisations will be provided with an information pack, opportunity to participate in workshops, and support in using the questionnaires and reporting on data. Alison is considering how best to encourage organisations to anonymise and share their data centrally. '*This will help us to say something meaningful about the difference that the sector as a whole is making to the lives of bereaved children and young people.*' Beyond 2013, the medium-term outlook is promising. Funding from the True Colours Trust and a PhD scholarship will support the framework until at least 2017.

## Case study: Bond's Improve It Framework

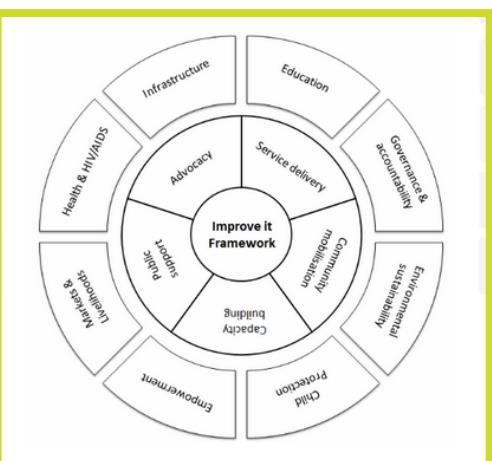
### Measuring international development

Capturing the impact of international development work is a challenge that Bond tries to address with its *Improve It Framework*. The UK membership body for international development NGOs began discussing how to develop better ways to measure its members' impact, and the impact of the sector as a whole, in 2006. But it was the arrival of a new chief executive, Nick Roserveare, that really drove the process forward.

Frustrated by many NGOs' inability to provide evidence for their work, in 2008 Nick set up Bond's effectiveness programme. Central to this is the *Improve It Framework*, a common set of outcomes and measurement tools for organisations to understand and measure their impact. Rob Lloyd, former head of effectiveness at Bond, recalls how '*the sector was concerned that implementing new measurement systems could lose the complex reality of its work.*' The initiative didn't take off until the Department for International Development (DfID) began prioritising evaluation, providing a clear incentive for NGOs to engage. Bond received funding from DfID and several NGOs to develop a prototype. Rob highlights the importance of good relationships with funders: '*They are especially important in helping to disseminate the framework and ensuring measurement actually happens.*'

A major challenge in developing the framework was the diversity of organisations in the international development sector. Through discussion with NGOs, eight thematic areas of work were identified with five strategies of engagement or ways of working. Bond was careful not to break the sector down into too many meaningless fragments: '*This would have weakened comparability, and ultimately the value of the tool,*' says Rob. Each of the eight themes required a different set of outcomes and indicators. Comparison was possible for some, but Rob warns that '*careful interpretation of results is crucial for it to be meaningful.*'

Bond initially developed the full framework for two sectors, testing and scaling it up before expansion to the others. Engagement with the organisations that would use it was a priority: '*you need to design it for people who use it on a day-to-day basis.*' The development process featured months of consultation, with practitioners from different sectors sharing their experience of evaluation. '*There's no point in developing robust tools if you don't bring along organisations,*' says Rob. '*That's the problem with most common frameworks. That's why buy-in is so important.*' While participation in developing the framework was open to all Bond members, it was initially difficult to recruit. Bond's approach was to '*go with where the energy was. It took time to win people over, but in the end, uptake was good. Being a sector body was important. It opened doors. You need trust and reach.*' At the time, Bond had a network of over 350 members. At one point, 25% of all members were involved. Having a core of committed members supported by a wider network helped to avoid overload.



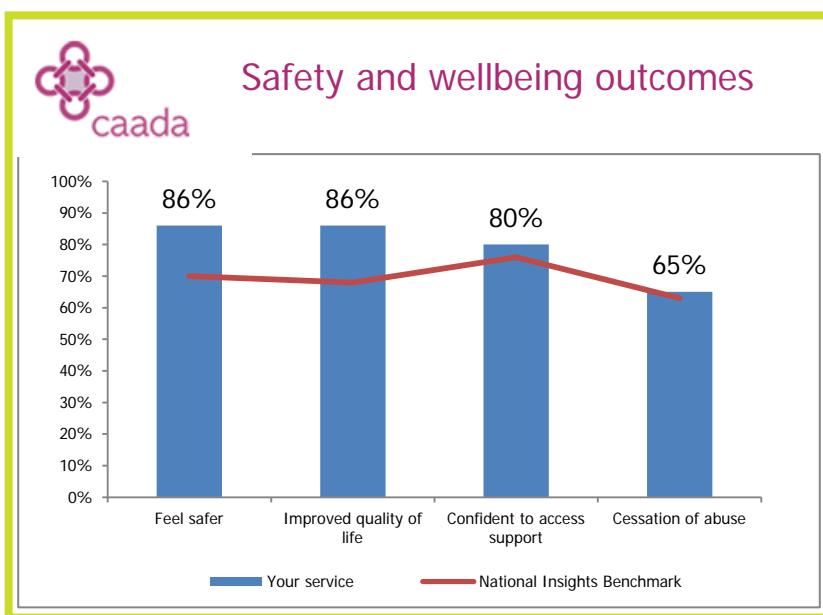
The framework for the first phase will launch in the first half of 2013, along with training sessions and further development. The tool is available online, an important factor in its success. Bond is not prescriptive about how the tool should be used, as long as it brings value to organisations. Rob thinks different organisations will apply it differently; some as a full evaluation framework, and others as a health check against their peers.

## Case study: CAADA

### Developing shared measurement for domestic abuse services

National charity Coordinated Action Against Domestic Abuse (CAADA) promotes a multi-agency response to domestic abuse, supporting organisations and professionals working with domestic abuse victims. To address the dearth of evidence in the sector, CAADA has developed a shared monitoring tool for specialist domestic abuse services. Called *Insights*, the tool enables organisations to collect consistent, comparable and reliable information on the people they work with. With this data CAADA can start to understand trends in services, looking at patterns in risk factors of clients and outcomes across approaches and sites.

Input from front-line staff was critical in developing the system, says Victoria Hill, director of strategy and development at CAADA. *'The first step we took was to form a stakeholder group made up of practitioners and commissioners.'* This was important to identify what information should be collected. CAADA then recruited six organisations to pilot the tool and ensure it was measuring the right things. The tool was developed to fully integrate with practitioners' existing case management. *'It was critical to make sure the tool was aligned with the case management process so it isn't a burden on the practitioner'*, says Victoria.



*Insights* is being used by 20 domestic abuse organisations, and CAADA has plans to expand it. *'This scaling is really important,'* says Victoria, *'the more organisations using the system, the more data we have to understand trends in what works and the more organisations can learn from each other.'* CAADA received funding from a number of grant-making trusts for the initial development of the system and are hoping to fund its expansion in the same way.

The reactions of users of the tool have been interesting: *'earlier reactions were suspicious; they thought it would lead to unfavourable benchmarking.'* But in practice, organisations find access to benchmarked data incredibly useful. *'Insights helps them understand what is reasonable for their service, and where they stand in relation to other services.'* This helps them get a sense of what is possible. Having aggregated data has also allowed CAADA to spot trends in cases they see. Chief executive Diana Barran told us, *'the data showed that victims who are referred by hospitals have generally experienced abuse over a shorter length of time than victims who are referred by other services. This can help us make decisions about where teams should be located and map what interventions lead to changes.'*

## Case study: Realising Ambition

### Shared measurement across the country

Realising Ambition is a £25m Big Lottery-funded programme which invests in promising evidence-based projects to help children and young people achieve their potential and avoid pathways into offending. The programme is managed by a consortium, and 25 organisations have received funding and support to replicate their interventions across the UK.

Consortium members Substance and the Social Research Unit support funded charities to monitor and evaluate the impact of their programmes. This is done through a shared outcomes framework for the 25 projects: *Views*, an online project management and impact reporting platform developed by Substance, which organisations use to monitor and report their intermediate indicators and outcomes.

Neil Watson, director of external relations at Substance, told us about the development of the framework. One of the difficult issues in agreeing on common outcomes is striking the right balance between being flexible and maintaining coherence. '*When we initially asked the organisations as part of the application process to report on what they wanted to achieve, we got an overload of disparate information, which would have been impossible to include in a shared outcome framework,*' remembers Neil, '*so instead we developed a long list of potential outcomes and consulted the grantees on what they prioritised.*'

In the end the Social Research Unit developed a framework supported by empirical data containing six broad outcome areas, including improved behaviour and relationships and reduced involvement with the criminal justice system. Each of these areas contained specific indicators; all linked to short pre- and post-intervention questionnaires which could be completed remotely through *Views*. Organisations chose two or three outcomes and indicators that matched the context and delivery model they were replicating.

Neil believes one of the biggest challenges of developing common measurement across national programmes is accommodating the existing systems of delivery agencies. '*It's always a challenge with organisations that have their own system, particularly those systems that lack flexibility in their data structures or can't report in real time.*' He sees a solution in ensuring data collection and reporting tools can work with different impact reporting platforms. '*You need to get data and tools talking to each other. The mobile phone industry has done this successfully with third party applications, and it's a methodology we should be replicating in programme management across the voluntary sector.*' This would ensure that front-line staff are better-equipped to report the impact of their work, and programme-level support can be more focused, which can make a difference to a project's success.

Although it is early days, Tim Hobbs, project lead at the Social Research Unit, reports that the 25 grantees have been very positive about the framework: '*agencies liked that outcomes were suggested but also there was choice, and that they were supported to make decisions about which were the most relevant to them.*' He also thinks that having the funder or commissioner validating and backing the selected outcomes is crucial, as is ensuring that there is engagement with all stakeholders during the planning phase. '*Building a good open relationship between delivery organisations and commissioners is absolutely critical; it is essentially agreeing the rules of the game before the whistle goes.*'

## Case study: Citizens Advice

### Tracking the impact of advice services

Seven years ago, Citizens Advice began using an evaluation system to track the impact of advice across its network of local Citizens Advice Bureaux (CAB). These bureaux deliver advice from 3,500 locations in England and Wales, run by 382 individual charities. Citizens Advice, the membership organisation for bureaux, sets out quality standards and provides training, information systems and other support—including measurement and evaluation.

Citizens Advice's system sees all bureaux contribute their results to one central database, which is fully digitalised and available online. The data collected is used for internal learning and training, and the cost of using the system is included in the CAB membership fee. The decision to introduce a common measurement system was driven by a change in funder requirements, which obliged CABs to demonstrate they were using resources effectively. At the time, each bureau had between one and forty different funders—mostly statutory, all with different measurement requirements.

Each year, CABs advise on 7.1 million problems, face-to-face and by phone, and the Citizens Advice website receives 14 million visits. The biggest challenge to measuring impact across its services is the variety of advice offered, much of which is low-intensity and one-off, making in-depth monitoring difficult.

The system was developed with input from CABs across the UK. It was important that the system provided flexibility in the outcomes and indicators it measured, given the diversity of the bureaux. Tamsin Shuker, impact manager at Citizens Advice, explains: *'First and foremost, the approach needs to be well-designed to make sure it's reflective of the services provided, proportional to the resources available and the sample is a fair representation of the whole population.'*

Standardising definitions and outcomes was important to allow national aggregation, shared understanding and enable comparability. *'The system offers a comprehensive list of standard outcomes, whilst also allowing bureaux to add codes to meet local needs. This flexibility is the key to its success.'* In total, there are 700 standard outcome codes to choose from, which reflects the variety of advice provided by CABs. These include several softer outcomes, such as confidence and well-being which bureaux felt were important to measure alongside advice outcomes.

The system's early adopters tended to be bureaux that were already incentivised by their funders, keen to receive marketing exposure, or particularly forward looking. Over time, Citizens Advice saw a shift in attitudes towards measurement, and today 90% of bureaux record outcomes within this system.

Feedback has been positive so far, with local bureaux reporting that the system is relevant and easy-to-use. Revision of outcomes takes place every six months: *'There is a need for continuous refinement of the system as the environment is constantly changing.'*

*'Presenting the results back to those who are using the system is really motivational and powerful,'* says Tamsin, reflecting on the development of the tool. *'28,500 people work across the Citizens Advice Service, this data allows us to know the difference that we make'.*

# Recommendations

Our findings show that there are a number of key factors to developing a successful shared measurement approach. Despite the challenges involved, the developers we spoke to have succeeded in bringing a shared approach to their sector, and seen the benefits.

By developing shared measurement, charities can reduce the cost and burden of developing their own tools. They can also develop a greater understanding of their sector's impact network and understand how their work links to that of similar organisations. Most importantly, they can compare their results to similar organisations in their field, and begin to understand what is normal for their work, and what they should be aiming for. This is crucial for charities to understand what leads to the best outcomes for the people we work with. As CAADA found, '*this kind of information can help us make decisions about where teams should be located and map what interventions lead to change.*'

Many of the developers we spoke to still struggle to scale their approaches and ensure their sustainability. The sector needs to invest in the right technology for shared measurement—incorporating tools into easy-to-use software systems or web-based platforms. Funders also need to support shared measurement and commit to long-term funding to allow the tools to reach a stage where they can scale and achieve sustainability. There are a number of actions the sector can take to develop and embed the use of shared measurement.

## Recommendations for charities

- Charities interested in developing impact measurement should first look at whether any shared approach exists for their area.
- Charities should think about their impact networks, and which organisations they could collaborate with to develop a shared measurement approach.
- Charities should encourage their funders to support a shared measurement approach as well as streamlining their reporting requirement.

## Recommendations for funders

- Funders play a key role in shaping the sector's measurement practices. NPC's impact survey found that the most common reason charities cite for measuring their impact is funder requirements. Funders should consider developing shared measurement approaches to improve consistency in measurement, and to reduce duplication in reporting for different funders.
- Funders should consider providing long-term support to shared measurement approaches. Funding needs to be directed to the early stages of developing shared measurement, as well as the later stages of developing a software solution.
- Funders that are considering leading a shared measurement approach should involve grantees, particularly front-line staff, as much as possible.

## Recommendations for sector bodies

- Sector bodies play a unique role in developing shared measurement. They should consider the demand for shared measurement in their sectors and consider championing a shared approach. Many of the developers of shared measurement in our review were sector bodies. Their position helped them gain the trust needed to develop a shared measurement approach, but also helped to ensure they could balance the needs of different stakeholders throughout the process.

## What next for Inspiring Impact's shared measurement work?

We hope to use the findings from this research to promote shared measurement across the charity sector. We would like those interested in developing shared measurement in their sector to use this report's framework of success factors and examples as guidance. We would like to hear from organisations interested in trialling shared measurement and keen to use this research.

NPC is also working on a number of shared measurement projects to test and refine the success factors outlined in this report. We are currently developing a shared measurement approach for youth employability, as well as working with the National Offender Management Service to develop a shared measurement approach for charities working to improve the family and peer relationships of offenders. The success factors from this review will be fed into the design of these two projects. We also hope to trial a number of shared measurement approaches as part of our work on Inspiring Impact.

Over the next 12 months, NPC will be looking at specific areas that affect the scaling and sustainability of shared measurement—including the availability of appropriate technology solutions to enable access to and sharing of data. We hope to collaborate with other strands of Inspiring Impact, particularly data, tools and systems, to explore these issues. We would also like to examine shared measurement approaches that have not been as successful in engaging organisations and scaling up. We need to understand these 'failure factors' to further our understanding of how shared measurement can be embedded and scaled across the charity sector.

As we begin to see even more shared measurement take place we hope to adapt and revise the findings in this report and add to our knowledge of what works in developing shared approaches.

# Appendix

## Methodology

### Literature review

We carried out an extensive literature review of research examining similar issues in developing shared measurement. We also looked at more general research into developing impact measurement and performance management systems in various different sectors. The most relevant of these publications are discussed in the previous research section of this report.

### Interview questions

A semi-structured interview schedule was developed based on previous research in this area and NPC's experience of developing shared measurement approaches. Interviews lasted between an hour and an hour and a half.

### Interviewees

Shared measurement interviewees were recruited through NPC's own networks, a web-engine search and through a call for shared measurement examples to the Inspiring Impact network. Twenty different approaches were included in our interviews—selected to be representative of different types of shared measurement.

### Analysis

We used thematic analysis to look for common themes in the interview scripts. Themes were coded and grouped together to generate the success factors.

### Limitations of our approach

It proved challenging to select a representative sample of organisations with shared measurement approaches to interview. Because shared measurement is a relatively new and undocumented approach, we relied heavily on our own networks to recruit organisations to interview. This means that the examples included here may not include as full a spectrum of shared measurement as we would wish. It also means that we have included only approaches that have been successful—we have not looked at specific examples of shared measurement approaches that have failed.

It is also quite a complex task to understand the success factors involved in developing shared measurement. This is because the issues involved in shared measurement are so closely intertwined with other issues affecting the sector—for example, good collaboration, good leadership and high-quality impact measurement. These kinds of issues are examined in the context of how they affect the process of developing shared measurement.

## Shared measurement approaches

### Home-Start

Home-Start is a national family support charity that provides volunteer support to families and children. Home-Start have developed a shared monitoring and evaluation system for their network of 310 local Home-Starts. The *MESH* (Monitoring and Evaluation system Home-Start) tool has a number of shared outcomes that local Home-Starts can measure as part of their work. The system allows practitioners to record a baseline for families and record their journey throughout a period of support. The system also has dedicated software to allow Home-Starts to input their monitoring data.

### Citizens Advice

Citizens Advice supports 382 local Citizens Advice Bureaux. Citizens Advice Bureaux provide free, independent, confidential and impartial advice to members of the public. Citizens Advice has developed a shared outcomes and indicators framework for local Citizen's Advice Bureaux to measure the impact of their services. The system allows local bureaux to choose from a set of 700 standard outcome codes which reflects the variety of advice provided by the Citizens Advice Service. All bureaux contribute their results to one central database which is fully digitalised and the latest database is available online.

### Mind

Mind is one of the largest mental health charities in the UK, with a wide range of activities—from campaigning for better government services to providing information about mental health. A fundamental part of Mind's work is delivered through its network of 180 Local Minds (LMs), which run services from supported housing to crisis helplines. Mind developed a shared measurement for its network of over 150 local Minds in 2011. NPC worked with Mind and the local Mind network to develop a shared theory of change and a number of measurement tools to measure shared outcomes. Mind is currently piloting use of the framework before rolling it out more widely to the network.

### Community Evaluation Northern Ireland

Community Evaluation Northern Ireland (CENI) provides specialist monitoring and evaluation support to help strengthen the voluntary and community sector in Northern Ireland. CENI has developed an approach to evaluating community projects, called *Measuring Change*<sup>x</sup>. *Measuring Change* is a method for capturing hard-to-measure qualitative outcomes of community-based programmes. The approach outlines an overarching framework of common programme outcomes and then measures baselines and change against these outcomes. The approach involves a high degree of collaboration between various stakeholders to determine outcomes and to measure change. CENI applied this approach to develop an evaluation strategy for two Big Lottery NI funded programmes. CENI developed an outcomes framework of 24 outcomes that were common to 36 different funded projects in the two schemes. CENI then measured baselines and progress against these outcomes using 'Nominal Group Technique'. This technique allows project managers, staff, users and partners to collectively rate change in different outcome areas. This allowed the different projects in the two schemes to chart progress and evidence the difference they were making to their communities.

### Youth Music

Youth Music is the leading UK charity using music to transform the lives of children and young people, particularly those with least opportunity. Youth Music funds a variety of different music projects throughout the UK. To support these projects, Youth Music has developed a common set of evaluation tools for youth music organisations to evaluate their impact<sup>xi</sup>. These tools include standard scales as well as qualitative methods for the Youth Music network to demonstrate its outcomes with children and young people. The tools measure changes in, for example, musical ability, personal development and social development.

### York Consulting

York Consulting provides consultancy services across England, Wales and Scotland. It specialises in evaluation, economic analysis and social research across the public sector. York Consulting was commissioned by the Department for Education to develop an online common tool for local authorities to assess risk and resilience factors within families and to track whether these factors changed. The tool, called Family Pathfinder, looked at a number of different quantitative indicators of risk and resilience in families.

### Substance and Realising Ambition

Realising Ambition is a £25m Big Lottery Funded programme investing in evidence-based and ‘promising’ family, school and community projects designed to help children and young people achieve their potential and avoid pathways into offending. Social research co-operative Substance and the Social Research Unit have been leading on supporting funded charities to monitor and evaluate the impact of their programmes. This involved developing a common outcomes and measurement framework for the 25 funded projects. These agencies have now begun monitoring and reporting their intermediate indicators and outcomes using *Views*, an online project management and impact reporting platform developed by Substance.

### Substance and Sports for Development

sported. is a charitable organisation, which provides funding and organisational development support to groups that use sport to improve the lives of young people in disadvantaged communities. sported. wanted to support sports charities to demonstrate their impact and evidence the value of sport in helping young people. To do this, it commissioned Substance to review the evidence base for sports and its impact on young people and to developed a framework for organisations to start evidencing their value. Substance carried out a review of the literature to identify impacts the framework should measure. From this, it identified seven primary outcomes for organisations to measure and has been developing tools for organisations to start using.

### NPC’s Well-Being Measure<sup>xii</sup>

NPC’s first interest in shared measurement stems from our work to develop a shared measure for charities to assess changes in the well-being of children they work with. This first report published in 2008<sup>xiii</sup> looked at standardised questionnaires to measure different

aspects of children's well-being. This research culminated in a new questionnaire to measure children's well-being, which is now incorporated with a website. This means that children can complete the questionnaire online and the analysis process is automated. Over 50 charities working with children have used this shared measure. While *NPC's Well-being Measure* is interesting as a shared measure it misses out on some aspects of shared measurement—for example, a sector developing tools together, outcomes being determined through a bottom-up process and developing an understanding of a sector's impact network. The projects discussed below make use of this shared approach.

#### **Improving prisoners' family ties<sup>xiv</sup>**

There are a number of charities working to improve the family ties of prisoners. While there is a lot of anecdotal evidence that strong family ties help reduce the likelihood of reoffending, this link has not been robustly evidenced. Furthermore, it is not clear what the links are between short-term changes in family ties and longer-term outcomes, for example reduced offending. This project aimed to improve the evidence base by developing a shared measure to assess the impact of charities working with prisoners and families. The project developed a theory of change for charities working in this sector and developed a number of shared tools to assess the impact of their work. NPC is now working with the National Offender Management Service to build on this work and develop a shared toolkit for charities to measure the impact of work to improve family ties and peer relationships.

#### **NPC's work on shared measurement for NEETs charities<sup>xv</sup>**

There is a substantial number of charities that work with young people helping them to develop the skills needed for employment and training. Measuring the difference that this work makes is difficult. The improvements these charities see (such as building self-confidence and motivation) are often intangible, and it is difficult to track whether a young person goes on to find and keep a job once they leave the charity. To address these challenges, NPC worked with a group of charities that support young people who are NEET or at risk of becoming NEET. Together with charities and funders in the sector, NPC developed a shared theory of change for the charities and outlined a number of measurement recommendations and tools that the sector could use to measure its impact.

#### **The ASCOT tool**

The ASCOT measure was developed by the Personal Social Services Research Unit to capture information about an individual's social care-related quality of life (SCRQoL). The measure was developed to be applicable across a wide range of user groups and care and support settings. The measure looks at a number of outcomes areas; control over daily life, personal cleanliness and comfort, food and drink, personal safety, social participation and involvement, occupation, accommodation cleanliness and comfort and dignity. The measure can be used to assess an individual's needs and to also assess change over time.

### Catalyst framework of outcomes for young people

The Young Foundation was commissioned by the Department of Education to build the capacity of youth organisations to understand and measure their impact. The Young Foundation worked with the National Council for Voluntary Youth Services and a number of youth organisations, funders, front-line staff and young people to develop shared outcomes that the sector achieves for young people. The Young Foundation also reviews the evidence base for youth work and identified a number of important areas for the framework to include. The framework outlines the final agreed outcomes for the sector and recommends a number of measurement options that can be used to evidence the outcomes.

### CORE

The CORE (Clinical Outcomes in Routine Evaluation) system was developed over ten years ago as a standard outcomes measurement tools for counselling and psychotherapy. The system was developed to measure a number of key performance indicators that were developed to benchmark counselling and psychotherapy services. The system is used by more than 500 services in the UK to regularly monitor and benchmark therapeutic improvements of clients. The system has a dedicated software platform that practitioners can use to analyse improvements in their clients and compare these improvements to a national baseline.

### The Asset tool

The Asset tool is a standardised questionnaire used by the Youth Justice Board (YJB) to assess risk and resilience factors among young offenders and to track improvements. The tool was developed out of an extensive review of risk and resilience factors in youth offending. A number of key areas of life were identified as playing a central role in increasing the likelihood that a young person would go on to offend. A number of protective factors were also identified that make it less likely a young person will offend. The YJB uses this tool to understand the risk level of the young people it works with. It also uses the tools to track improvements in young people.

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