



**HACT**

*Housing, people and communities*

**TSRC**  
*Informing civil society*

Third Sector Research Centre  
Survey Report for HACT

## **Community investment by social housing organisations: measuring the impact**

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## Preface and acknowledgements

We would like to thank HACT for commissioning this survey and for inviting us to participate in two roundtable discussions in February and October 2011 with members of the Housing Empowerment Network to explore the current state of social impact measurement in the social housing sector. Our thanks also go to those who participated in the discussions and to the 34 interviewees from housing organisations who took part in the follow up telephone survey in November 2011 on which this report is based.

We have tried to make the report as useful as possible to housing organisations currently considering their future approach to measuring the social impact of their community investment activities by outlining eleven externally developed tools used by one or more participants in the survey. We would stress that the reviews included in this report are purely based on the telephone interviews undertaken with existing users and they do not constitute an independent assessment or judgement by ourselves. We would also stress that the selection of tools was based only on those currently used by survey participants and is far from exhaustive. Appendix 2 provides some sources for those wishing to look at the wider options and approaches.

We would like to thank those organisations who have indicated a willingness to take part in further research and work by HACT and TSRC in this area. There is a lot of interest in the sector on impact measurement at present and there is clear benefit in more collaborative sharing of ideas to consider how much impact different approaches to community investment can have. At a time of political scepticism about the role of social housing it is important to establish what evidence there is of a wider community impact.

Vanessa Wilkes and David Mullins, Birmingham 2012

# 1. Introduction and methodology

## 1.1. Executive summary

This research aimed to generate an up-to-date picture of the measurement tools which are currently being used by housing organisations to measure their social impact occurring as a result of their community investment activities.

Of the 34 responding organisations, 35% use internally developed tools, 41% use tools which have been developed externally and 9% use a mix of both. The remainder do not currently use a tool.

It was clear from the survey that organisations were at different stages in measuring social impact and were experiencing a variety of concerns.

The main drivers for adoption or development of tools were linked to accountability (both within the organisations and for tenants and funders) and a desire to ensure that projects are being delivered effectively and are relevant to the needs of the communities.

Some common concerns were apparent within most respondent organisations, with the development of outcome measures being an example. Organisations struggle to develop appropriate outcome measures which they can monitor. Where organisations have done this, there is an appreciation that they need to be constantly monitored and tweaked to ensure they are effectively measuring what is intended to be measured. A further example is linked to the analytical skills which are needed within the field of impact measurement.

In addition to these general themes, the report offers an insight into the different externally developed tools which are being used. Section 3 profiles eleven different externally sourced tools in use by survey respondents and in each case summarises inputs, tools and types of data in a simple diagrammatic format and effectiveness, costs and benefits in a simple table. While this is intended to provide an accessible summary of the tools it does not constitute an independent review and organisations need to make their own assessments and judgements.

Section 4 reviews internally developed tools which cover a similar range of approaches to the external tools but exhibit generally lower satisfaction ratings. There was widespread recognition that there is continuous development and change in this area.

Sections 5-7 briefly consider the extent of social impact measurement, previous approaches and future approaches in the sector. While 63% claim to be measuring social impact now, there were a variety of reasons given for not measuring all projects. There was very little evidence on past tools and approaches but much expectation of change in the next year. Acknowledging that the tools and methodologies are developing, over 65% of organisations using internally developed tools stated that they would look to change their measurement tool within the next 12 months.

Section 8 found surprisingly limited involvement of participants in joint impact indicators or measures but overwhelming agreement that this is something that their organisations would be interested in the future subject to a number of caveats. The potential for local collaboration with partners, sector benchmarking and sector profiling suggests that bodies like HACT could play a useful role for facilitating learning in this area in the future.

Section 9 includes information on community grant funds (53% of respondents had them, although the actual amount may be greater as there was a variety of names given to them). The methods of allocation were extremely varied and unique. Approximately 56% of projects funded from community grant funds were measured; with a further 13% of organisations saying that they would be subject to the same measurement techniques as community investment initiatives when a measurement tool was in place.

The report concludes that the current picture of social impact measurement is extremely varied across the sector; that there is general recognition of its importance but concerns about cost, approach and potential duplication. Some recommendations are made to housing organisations for development and use of outcome measures and to HACT for co-ordinated joint learning.

## 1.2. Introduction

This report has been produced as a result of a telephone survey into how housing organisations are measuring the social impact of community investment activities. This project was commissioned by HACT and undertaken by the University of Birmingham as part of a longer term partnership exploring the community investment role of housing organisations.<sup>1</sup> The project also links closely with the author's PhD which is being undertaken in partnership with the National Housing Federation and their 2011 Neighbourhood Audit.<sup>2</sup> It builds on earlier work undertaken by the University of Birmingham for the Tenant Services Authority (Mullins et al. 2010) which comprised an overview of approaches to measuring social performance of community investment activities in England and the Netherlands and eight case studies of English housing organisations (four with internally developed tools and four using externally sourced tools).

The survey had five main aims. These were to:

- establish an up-to-date picture of the use of impact measurement tools by housing organisations who were known to be interested in this area;
- determine which community investment activities are being measured and why (the research did not consider measurement of core social housing services);
- identify differences in approach between neighbourhood, project and organisational levels of measurement;
- question the future direction of impact measurement; and
- provide information in an accessible form to Housing Empowerment Network<sup>3</sup> (HEN) members and others to help them decide which tools and approaches are available for them to use.

Additionally, the project sought to establish longer term research links with organisations which are willing to take part in further research, (including the researcher's PhD) and further work by TSRC, HACT and HEN on this topic.

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<sup>1</sup> See also Mullins (2011) Community Investment and Community Empowerment. Think Piece. TSRC and HACT.

<sup>2</sup> NHF – Neighbourhood Audit 2011 forthcoming.

<sup>3</sup> A network of housing organisations, organised by HACT to share approaches, build capacity and challenge each other to improve community empowerment.

The measurement of social impact is of continued importance to the sector, reflecting the wider third sector interest in impact measurement (see Appendix 2). This is also coupled with an apparent growth of 'non-core' activity and increased resources being made available for community investment in recent years. Individual housing organisations are responding to the increased external demands by funders and their own internal pressures to measure these activities.

The first section of this report provides an overview of impact measurement practices across the responding organisations and identifies some themes that emerged from the research. The next section reviews externally sourced tools, their perceived effectiveness and plans to address any weaknesses. The report then focuses on views from organisations with tools which have been developed internally.<sup>4</sup>

The following section reports on any changes to measurement tools envisaged over the next twelve months. The report concludes with recommendations on tools and processes for social impact measurement of housing organisations' community investment activities.

### **1.3. Methodology**

HACT commissioned the Third Sector Research Centre at the University of Birmingham to undertake a survey into how housing organisations are measuring the social impact of their community investment activities.

A questionnaire was developed by TSRC and agreed by HACT. It was decided that a telephone interview would be the most appropriate method as the questionnaire contained open questions where the probing which could take place during a telephone interview would enrich the answers compared to a self completion questionnaire. Where appropriate, during the analysis stage, open questions were coded and responses categorised.

It was decided to focus the survey on organisations with an active interest in the topic and therefore to start with those organisations who had attended relevant HACT events. An email was sent to all housing organisations which had attended either of the two 'Housing Empowerment Network' meetings in February and October 2011. The purpose of the project was explained and a copy of the questionnaire was attached to the email. Additionally, a definitions document was circulated to ensure that both interviewer and respondent had the same understanding of terminology to be used during the telephone survey. A copy of both of these documents is contained within appendix 1.

Organisations were free to select who should respond to the survey and respondents were asked to contact the researcher to arrange a date and time for a telephone interview if they were willing to take part in the survey.

The survey sample was later boosted to include a wider group of housing organisations who were known to HACT and the University of Birmingham. They were invited to participate using a similar email to the first sample cohort.

The telephone interviews lasted between 20 minutes and an hour and all were undertaken between 31<sup>st</sup> October and 25<sup>th</sup> November 2011. In total, 34 questionnaires were completed.

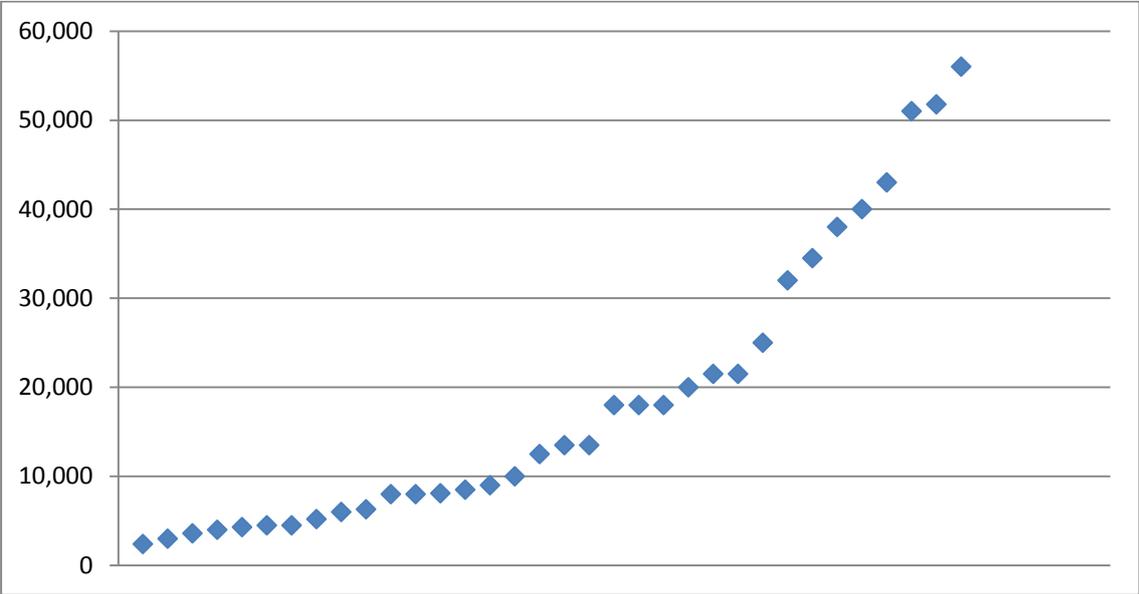
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<sup>4</sup> This follows the distinction between external 'off the shelf' and internal 'bespoke' tools adopted in the earlier report for Tenant Services Authority on measuring social performance (Mullins et al. 2010).

Table 1 and figure 1 show the sizebands which were covered. These were based on definitions used by the National Housing Federation but further categories were added above 10,000 homes to allow for a greater degree of disaggregation within the analysis.

It is clear from the table and chart that the sample under represents smaller organisations who account for the majority of organisations in the sector, but are less likely to be involved in measurement of community investment activities. This reflects the purposive sampling strategy of selecting participants who were known to be actively involved in measuring social impact based on their prior engagement with HACT. A more representative sampling strategy might have provided a better reflection of the current state of social impact measurement across the sector but would have been beyond the resources of this project and less likely to have generated relevant and useful evidence for developing approaches to measurement.

**Figure 1: Stock size of respondents**



**Table 1: Number of respondents by stock size**

Definition	Stock level (number of homes)	Number interviewed
Small	less than 500	0
Medium	500 to 2499	1
Medium/Large	2500 to 4999	6
Large	5000 to 9999	8
	10,000-29,999	11
	30,000 – 49,999	5
	50,000+	3
	Total	34

## 2. Analysis

### 2.1. Differing stages of measurement

During the telephone interviews, all respondents answered a series of questions concerning measurement activities in their organisation as well as any specific tool they were using, what detail it provided and the extent to which this fulfilled their requirements. With this in mind, all responding housing organisations were placed into one of four categories (shown in table 2) to roughly reflect the stage they are currently at in terms of measurement. It is apparent that some of the larger organisations have more established systems in place compared to their smaller counterparts, however several larger organisations are at an early stage in deciding which methodology is right for them.

**Table 2: Stages of measurement**

Size of housing association	Not started any formal measurement and looking around for tools	Fairly new to measuring and waiting to see what results the current tools give them	Currently measuring but aware that need to make the tools / indicators better	Have established measurement systems and are able to see the benefits
Medium			1	
Medium-Large	3	1	1	
Large	1		4	3
10,000-29,999	2	1	3	5
30,000-49,999	1	1		3
50,000+		1	1	2
	7 respondents	4 respondents	10 respondents	13 respondents

Total responses: 34

### 2.2. Why start to measure social impact?

Housing organisations were asked why their organisation had started to measure social impact. The responses can mainly be divided between those concerned with accountability and those focusing on the effectiveness of projects.

The most frequently cited responses concerned accountability, firstly to the Board with reference to the money which the organisation is investing in community activities and secondly to the residents, reflecting the fact that it is often their rent money which is being spent and thirdly, to external funders of projects.

However, in addition to this accountability, there was a real desire by many organisations to use the impact measurement tool as a project management tool. This was to ensure that projects were delivering what was needed, both in terms of what impact was being made to the residents and

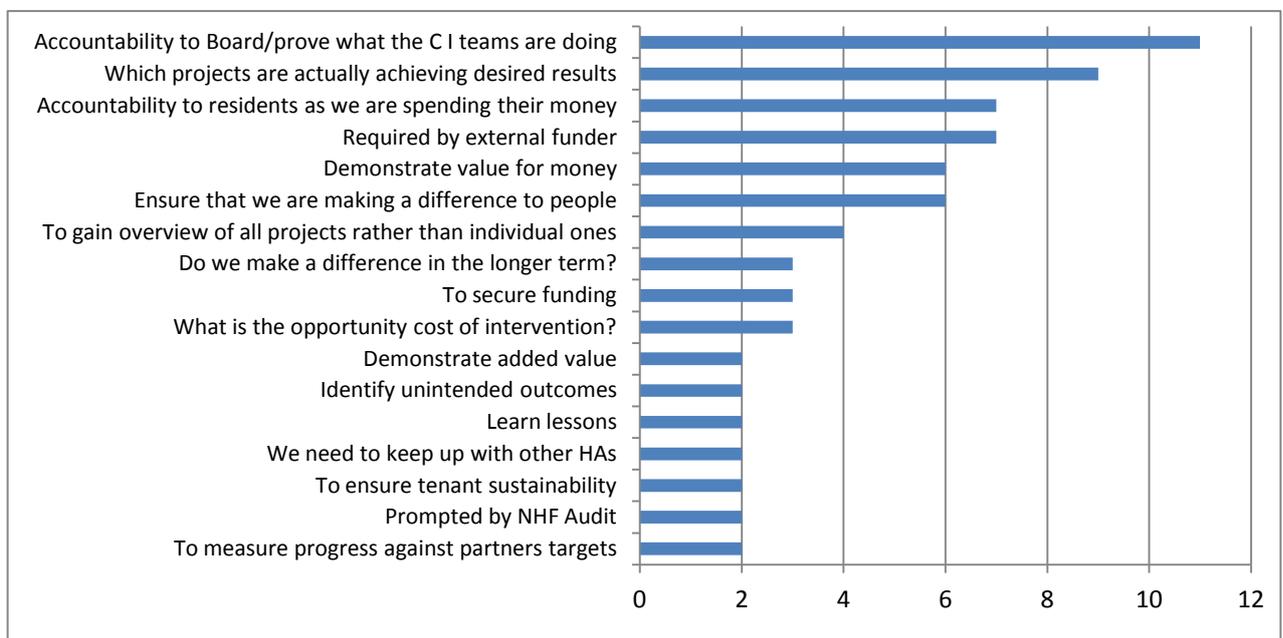
communities as well as measuring the effectiveness of a project in delivering the desired outputs and outcomes. Many respondents stated that intuitively they thought what they were doing was right but there was now a need to turn this 'gut feeling' into a more robust and watertight argument which could stand up to scrutiny.

Other motivations for beginning to measure impact included the desire to gain an overview of all community interventions and in some cases to assess the opportunity cost of an intervention.

The recognition that impact measurement is a growing concern within the sector was also apparent.

The following chart shows the most commonly cited reasons for housing organisations to measure their impact.

**Figure 2: The main reasons for measuring social impact**



Total responses: 34. Respondents were able to provide more than one reason.

Other reasons cited by a single organisation were, to:

- publish what we are doing;
- see whether we are getting a return on our investment;
- measure what makes a successful community;
- gain consistency across the organisation;
- come into line with performance management in other teams;
- justify the increased money being directed towards community investment; and
- make community investment seem less 'fluffy'.

Having seen the drivers for measurement, the following section looks at the origin of the tools used and whether they have been internally developed or sourced externally.

### 2.3. Which community investment activities?

All respondents were asked which community investment activities they undertook. The table below is an attempt to group a hugely diverse range of activities into activity areas. Definitions were provided as shown in Appendix 1 and classifications were informed by earlier work associated with the NHF Neighbourhood Audits (NHF 2008, 2012). It must be remembered that this information was collected during a relatively short telephone interview and it is probable that the interviewee could not mention every area of work they are involved in so it cannot be seen as an exhaustive list but merely indicative of the range of activities. Nevertheless, the table is organised to show the number of times each main category of activities was mentioned.

**Table 3: Type of community investment activities**

<b>Activity area</b>	<b>Example projects</b>	<b>Mentioned by number of housing organisations.</b>
<b>Employment, training and economic wellbeing</b>	Provision of work experience Provision of start up units Reducing worklessness Training and skills development	22
<b>Financial inclusion</b>	Debt advice Opening bank accounts Partnership with credit union	19
<b>Neighbourhoods and community</b>	Resident engagement Provision of green spaces Healthy eating and growing your own vegetables Before and after school clubs	15
<b>Young people</b>	Anti social behaviour prevention Diversionary projects Being taught to drive Anti-bullying work with schools	11
<b>Older people</b>	Lunch clubs Engagement IT training	5
<b>Social enterprise support</b>	Handy person scheme	3
<b>Energy efficiency</b>	Reducing bills	3

Base: 34 Respondents

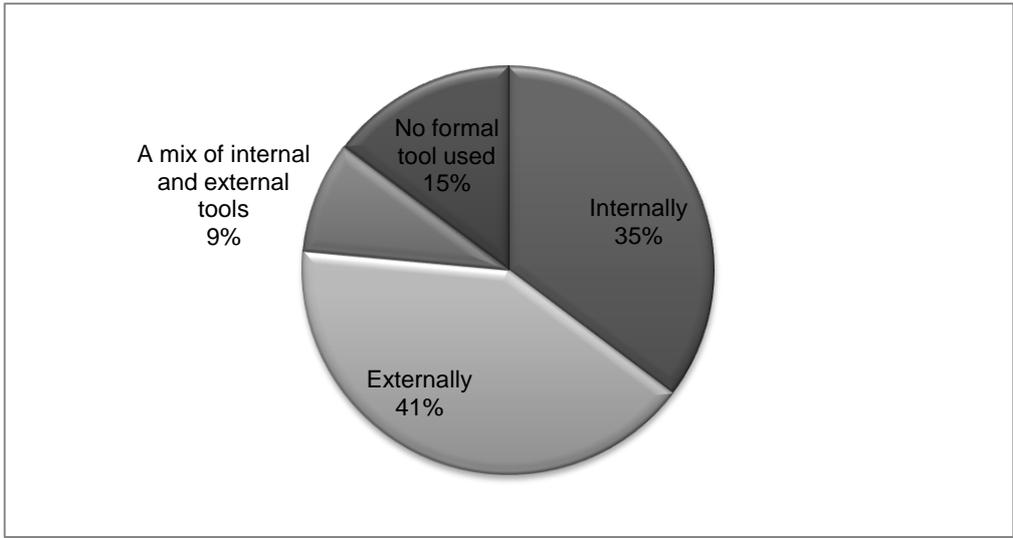
Some organisations reported that their activities were based along strategic themes within the organisation, others had adopted the key themes from local strategic partnerships and PSA targets. In some cases these targets were retained even though the developing body may have disbanded as they were seen to accurately portray the relevant issues.

**2.4. Origin of the measurement tools**

The following sections of the report make reference to ‘measurement tools’ used by housing organisations to assess the social impact of their community investment activities. Earlier work had identified the mix between measurement tools developed within individual housing organisations themselves and more generic tools purchased from an external source (Mullins et al. 2010). Since that report there has been a rapid expansion of interest in social impact measurement in the third sector and a wider range of tools are now available including some bespoke tools for housing organisations. Appendix 2 provides some source information on the wider range of tools, while section 3 below outlines eleven specific external tools used by the survey respondents.

Those organisations which stated that they measure impact were asked whether they used an externally sourced tool, one developed internally or a mix of both. The following chart shows that more than 40% of organisations are using external tools only with a further 9% using a mix of internal and external tools. Internally developed tools were used by 35% of respondents. The 15% of respondents without a formal tool were mainly using paper based questionnaires and anecdotal reporting.

**Figure 3: Where was the tool developed?**



Base: 34 respondents

**2.5. Staffing resources**

Respondents were questioned about the staff resources dedicated to using the tool. The most common response was to have someone overseeing the tool and where respondents had not yet put this in place, it was seen as the most appropriate choice.

Two organisations questioned had created specific posts to begin this measurement process and other organisations had integrated the task of developing a methodology and researching tools into someone’s existing job role.

The majority of organisations had integrated using the measurement tool into existing job roles. Two organisations mentioned that they had a person dedicated to inputting the information which the other staff collected.

An important issue which arose during the research was a lack of analytical skills amongst people using the tools. These skills are essential in accurately utilising the data and information produced by the tool and making the decisions and statements surrounding impact measurement.

## **2.6. Concerns around measurement**

In addition to the positive views of measurement such as increased accountability and efficiency, several concerns surrounding impact measurement became apparent during the course of the research. The main concerns which were reported are summarised in the following paragraphs.

### **2.6.1. *Is community investment core business?***

Widespread differences remain between housing organisations as to the positioning of their community investment activities and teams. Some respondents reported on the very positive advantages provided by measurement in building support for community investment work as 'core business' with buy-in for impact measurement across the organisation.

However, some respondents are in organisations where very few resources are dedicated to community investment. In this situation, difficult decisions have to be made as to whether those scarce resources are put towards investing staff time and money into measurement or whether they are invested in the community. This is linked to the following concern.

### **2.6.2. *Tension between getting the job done and reporting on it***

Concern was expressed by some respondents, (mainly those awaiting results of an approach or those yet to start measuring), over the time and resources needed to measure impact. Although the need to measure was appreciated, it was extremely unlikely that additional resources would be made available. Some of the responding organisations had very few people in their community investment team and this was a particular issue for them.

In the same vein, there was a strong message that the data and information resulting from the measurement process needed to prove that the resources invested in the process had provided robust and useable information which really adds value.

### **2.6.3. *Outcome indicators***

There is currently a lack of agreed terminology which would enable impact measurement and community investment to be consistently understood across the sector and within organisations.

There was widespread agreement that creating outcome indicators for community investment activities which accurately reflect intentions is problematic and was mentioned by 11 organisations when they were asked about what lessons had been learnt with regards to measuring social impact. Even when measures are developed, there is a constant need to revisit and tweak them to ensure that they are effectively measuring what is intended.

Concern was also expressed in several interviews of the dangers of 'over claiming' as many felt that they did not have the skills or knowledge to disaggregate the part which the housing organisation had played in the outcome compared to other external factors.

There was acknowledgement that many community investment indicators are qualitative and tension was apparent between the reporting and acceptance of this qualitative information against the more quantitative corporate metrics. Housing personnel expressed that they are keen, when reporting

outcomes, that a qualitative element remains rather than everything being reduced to a number. It was a commonly held belief that only qualitative reporting really captures the essence of community investment and the changes it makes to individual lives and community well-being.

#### **2.6.4. *Not knowing what you want***

'What does 'good' look like?'

There was general acknowledgement that there is not one measurement tool which is applicable to all activities and which can measure all the required dimensions within all housing organisations and many organisations doubted that it would ever be the case. This confirms the finding of earlier work (Mullins et al. 2010) that rather than seeking the holy grail of a single tool, a toolkit would be needed to measure diverse outcomes of community investment for individuals, projects and the organisation and to prioritise and plan such activities for the future.

People are aware that it is a difficult area and there is a divide between those who are willing to accept the limitations of tools and methodologies and those who have a 'wish list' of what they would like to see.

Some respondents had not decided on their approach to measurement, whether they should approach it on an individual project by project basis or assess the overall impact of activities.

A divide was also apparent between those organisations who had been researching the available tools and felt they could not yet make a choice due to the large number which are available and those organisations which have little or no knowledge of the available tools.

#### **2.6.5. *Different community investment experiences within the sector***

Respondents spoke of the differing levels and types of community investment activities which are undertaken, with a few respondents stating that the intervention provided by a smaller localised housing association may be very different in character to that of a larger housing association with more dispersed stock. Respondents stated that this may result in tenants having a different experience of what community investment is in terms of the level of intervention and the relationship between tenants and housing organisations. The consequence of this, it was felt, was that any social impact measurement may actually be measuring very different approaches and experiences and this needed to be acknowledged.

### **2.7. Working in partnership**

Organisations were questioned as to whether they had worked in partnership whilst they were developing or using their tool. Over 60% of respondents said they had not worked with anyone external to the organisation. Those organisations who had worked in partnership were evenly spread between those with internally developed tools and those who had bought in an externally developed tool (both 17%). The reasons forwarded for partnership working included:

- working with other housing organisations on a new approach;
- working with local partners to gain data to input into the tool; and
- seeking advice from other housing organisations before purchasing a tool.

There was widespread acknowledgement that partnership working is likely to increase in this area and the only constraint which was envisaged by organisations, was that of resources and decreasing budgets. Key organisations which were mentioned as probable future partners included the local health services, the Police, other housing organisations and local authorities. Earlier research had identified tools that lend themselves to collaborative planning such as the outcomes arena tool that can be used to identify potential investors and beneficiaries for a local project and to work together to identify the actions needed to secure joint outcomes (Mullins et al. 2010).

## **2.8. Effectiveness of the tool**

All organisations using a measurement tool were questioned about the effectiveness in providing them with the data and information which their organisation required. Respondents were asked to rate this effectiveness on a scale of 1 to 5, with 1 being ineffective to 5 being extremely effective. We must make clear our disclaimer that the ratings are those of the survey participants and are not based on independent review by the research team. While this question provides an indication of interviewees' perceived effectiveness of the tool, it was not within the scope of the research to assess what influencing factors there may be, such as whether the tool is being used to its full capabilities or how it is being used. Some respondents to the survey readily acknowledged limitations to the tool, accepting the complexity of the task. There were also examples where organisations had made changes to address limitations of tools and had overcomplicated the task, leading them to subsequently simplify it.

Twenty one organisations felt that they had sufficient knowledge and experience of the tool to be able to answer this question which produced an average satisfaction rating of 3.7.

The average satisfaction rating produced by the 11 housing organisations which have internal tools was 3.2. This compares to a higher average satisfaction rating of 4.2 from the 10 organisations who have externally developed systems. Although there was not complete satisfaction with all of the tools or approaches, respondents acknowledged that they may not yet be aware of the full capabilities and functionality of the tool. All were keen to stress that they are constantly seeking to improve their approach. The reasons given for any level of dissatisfaction with the tools are provided in section 3 for external tools and section 4 for internal tools.

## **3. Externally developed tools**

This section reports on externally sourced tools used by respondents to this survey. It does not include general management systems and is not an exhaustive list of all available tools. There are web links to other tools investigated by other reports in Appendix 2.

A table is presented for each tool giving details of the experiences of the users in terms of effectiveness and weaknesses. A diagram underneath each table illustrates the inputs into the tool and the resulting data. More than one diagram may be shown for a tool, demonstrating the differing way in which it is being used by different organisations.

Descriptions of what the tool is able to do and the cost of it is a combination of information collected from respondents and that gleaned from relevant websites. It is beyond the scope of the research to assess whether the tools are being used to their full functionality or how applicable they are for measuring social impact.

### 3.1. Advice Pro

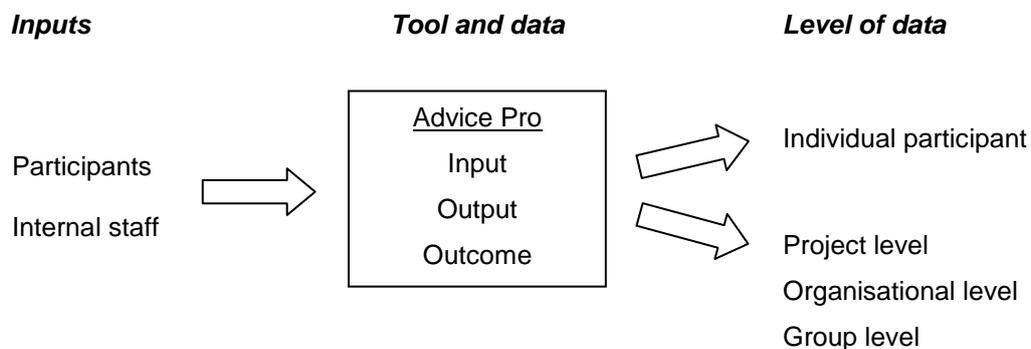
Launched in 2007, the supplier describes this tool as a secure case management application which has been developed in association with AdviceUK, the UK's largest network of organisations which provide advice. It brings together all the financial interventions connected to an individual and there is an option to have a legal and monetary module.

It is currently used by over 150 organisations across the charitable sector as well as local authorities (Meghani, 2011).

**Table 4: Advice Pro: respondent's experience**

Number of respondents	1
Effectiveness Rating	4.5
Most tangible benefits to the organisation	As a case management tool, it can demonstrate change at the level of the individual.  It provides robust data on a range of indicators including rent arrears, punitive actions avoided etc.
Issues	The organisation has not yet fully explored what the tool can do.
Plans to address these	Further exploration is needed.
Costs	The annual licence fee for the standard module for 5-10 users is £2,250.
Supplier and link	Resolution Case Management Ltd <a href="http://www.advicepro.org.uk">www.advicepro.org.uk</a>

The responding organisation was asked what information was input into the tool and what data was produced, the following diagram shows that the tool produces data at both an individual and project level. The data is produced at a regional level.



**3.2. Business in the Community – Corporate Responsibility (CR) Index**

This tool, which has been used by companies since 2002, is described as a management tool which helps companies manage and measure their social and economic performance. It also measures the impacts which they have had in their community and with reference to their corporate responsibility strategy.

After answering a series of questions and providing the supporting evidence, the organisation is awarded a score which reflects the extent to which the management of the Corporate Responsibility agenda has been integrated into the organisation’s strategy and operations. The organisation is then categorised into one of the following performance bands – Platinum, Gold, Silver or Bronze.

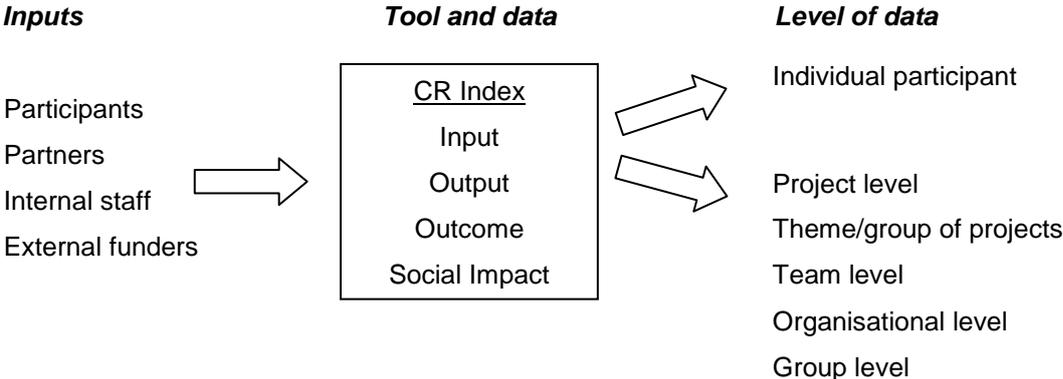
It is a tool used by over 850 UK companies across a range of sectors.

The responding housing association decided to use this approach, allowing them to measure themselves against companies external to the sector, to continue their existing good practice as they had received very good feedback from the Audit Commission and are in receipt of a business award. However, they are still at a very early stage with this approach.

**Table 5: Business in the Community: respondent’s experience**

Number of respondents	1
Effectiveness Rating	Do not yet know, it is too early to assess.
Most tangible benefits to the organisation	Whether the inputs into community investment are producing the right outcomes. Whether things are being done in the correct way or whether there is a different way of achieving outcomes. The development of innovative working practices linked to defined targets, such as CO <sub>2</sub> reduction.
Issues	Have not been using it long enough to assess its effectiveness. The softer people issues are harder to measure and that needs to be addressed.
Plans to address these	Too early to identify the issues.
Costs	n/a
Supplier and link	Business in the Community <a href="http://www.bitc.org.uk">www.bitc.org.uk</a>

From the table below, the data which is inputted into the CR Index and that which it subsequently generates is extremely comprehensive and covers all possible levels and is reported at the community level and aggregated geographic levels above that.



### 3.3. Community Impact Tracking Service (CITS)

This tool, which was launched in 2011, is the product of collaboration between four housing organisations – East Thames, Midland Heart, Aster Group and New Charter Housing - and HouseMark who is now the provider. It is currently the only tool available which has been developed from within the housing sector.

The tool is described as being able to manage community projects, track performance, evaluate the impact and compare outcomes. It is also possible to benchmark across the sector and offers access to HouseMark’s knowledge base of good practice information.

It currently has 17 subscribers within the social housing sector. This is clearly a limitation to the aim of providing benchmarking data, but this tangible benefit desired by two survey participants could grow if take up increases.

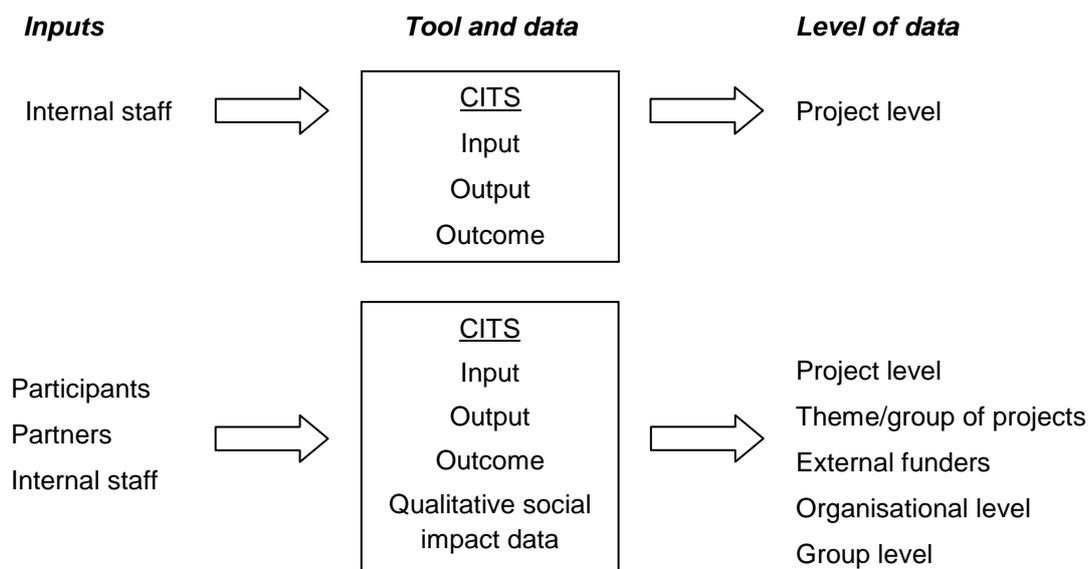
A total of six respondents within the survey had subscribed to this tool. However, due to the fact that it has only recently become available, many organisations had only explored certain aspects of it and may not have tested its full functionality.

**Table 6: Community Impact Tracking Service: respondents’ experiences**

Number of user respondents	4 (scored by three respondents as one respondent felt it was too early to say). A further two respondents had subscribed to the service but not yet started using it.
Average effectiveness Rating	3.5
Most tangible benefits to the organisation	Financial information, although there is a need for this to be linked to Value for Money. Comparing projects, both within the organisation and externally. Helping staff to understand how project activity links to outputs and impact. The baseline data entered into the tool which is a justification for the project.
Issues	There is a reliance on the person using the tool to make an assessment of the impact. As it is a new tool, the organisation are still learning how to make the best use of it. It produces a lot of data and the organisation is not sure how to make the best use of it or what sense to make of it. Two organisations had subscribed to take advantage of the benchmarking side of it but they feel this is currently limited due to the newness of the product. Feel it is more suited to project work rather than an embedded approach to neighbourhood regeneration.
Plans to address these	Educating people in using the tool and to assess impact in a considered way. Constantly looked at and improved. Refreshing the targets as some are outdated.

Costs	For existing HouseMark members, annual subscription is based on stock size - Up to 4,000 = £1,500 4,001 - 12,000 = £2,500 12,001 plus = £3,000 non-members (social housing providers) - £3,500 non-members (commercial organisations) - £5,000
Supplier and link	HouseMark <a href="http://www.housemark.co.uk">www.housemark.co.uk</a>

From the four users of CITs, only three felt close enough to the tool to answer questions about its data. The first diagram contains information from two respondents and the second diagram shows that the third respondent differs in their usage of it and aggregates up project level data. Geographically, respondents reported it on a borough level and any other geography which was deemed appropriate for a project.



### 3.4. Lamplight

This system was designed in 2004 for the voluntary and community sector and consists of a core module which measures the progress of individuals. The supplier's website states that it can demonstrate the impact made and increase efficiency. It also states that it has the flexibility to adapt to any information and reporting requirements. Amongst other things, it includes monitoring and reporting of individuals, case management and details of funders and volunteers.

The additional modules of communication, evaluation and staff management can be added to the core module.

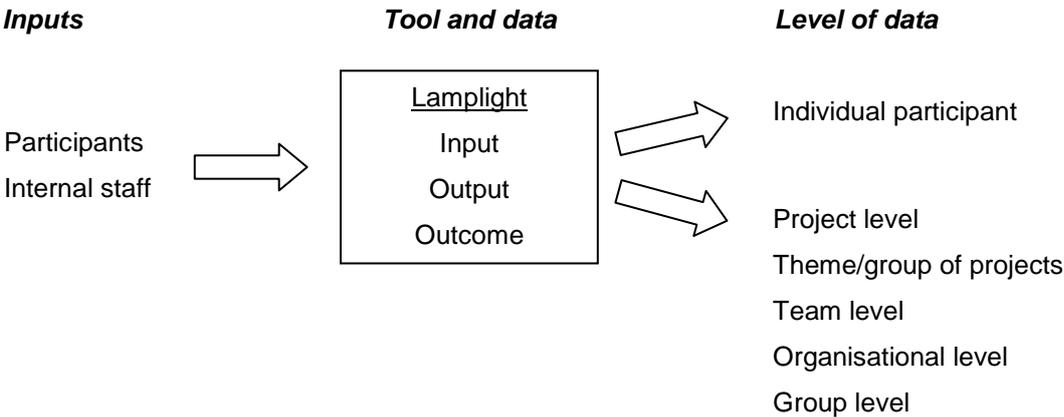
It has over 40 users across the third sector (Meghani, 2011).

This tool is used by the responding organisation for two different purposes, as a case management tool in a team concerned with employment and enterprise and as a monitoring tool within the neighbourhoods team. The organisation is currently developing an Outcomes Framework and the information from this tool will feed into that.

**Table 7: Lamplight: respondent’s experience**

Number of user respondents	1
Average effectiveness Rating	3 – where used as a case management tool. 4 - where used as a monitoring tool.
Most useful data	Demonstration of the scale of the community work undertaken, such as the number of residents we engage with.  With regards to the work on neighbourhoods, data can be viewed by which landlord people are linked to and this helps with joint funding.
Issues	Getting outcome measures is not easy where it is used for case management.  Where used as a monitoring tool, it is not that easy to extract the data.
Plans to address these	Lamplight have followed the work being done on the Outcomes Framework and the tool has been changed where possible to feed into it. Where the functionality of lamplight did not allow for changes, other tools will be used to provide the required information for the Outcomes Framework.
Costs	The core module costs £15 per month per project.  Additional modules incur additional costs.
Supplier and link	Lamplight Database System <a href="http://www.lamplightdb.co.uk">www.lamplightdb.co.uk</a>

The tool takes in information from participants and staff involved with the project and the data produced by the tool is available at both the individual level and the project level, which the responding organisation then aggregate. Data is reported at a regional and group level.



**3.5. Outcome Star**

This tool was originally developed for St Mungos in 2003. It is based on the ‘ladder of change’, described as an individual’s journey towards independence. The measurement of progress is based on statements within the Star and it can be used on an individual, or on a project or organisational wide basis. A distinctive feature of the individual level application is that the data is co-produced by the service user and their support staff.

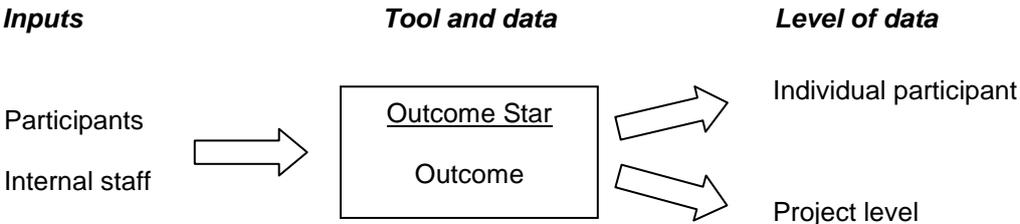
There are currently 11 versions of the Outcomes Star including ones concerned with community, homelessness, family and well-being. The tool is quite widely used for the evaluation of Supporting People funding and its use is a condition of grant funding in some areas.

The organisation using this tool also has an internally developed framework and evidence from this tool may be used, alongside other measures to support or feed into that. They are currently considering extending its use to other programmes.

**Table 8: Outcome Star: respondent’s experience**

Number of respondents	1
Average effectiveness Rating	5
Most useful data	The progress of individuals.
Issues	The time lag involved in projects of this nature may mean the impact is not felt for some time
Plans to address these	The tool needs to be used more consistently within the organisation.
Costs	Free to download.
Supplier and link	Triangle Consulting <a href="http://www.outcomesstar.org.uk">www.outcomesstar.org.uk</a>

The Outcome Star is completed by individuals with help by staff and the data produced in their journey of change can be linked to both the individual and the project which can then be aggregated. How data is reported geographically is dependent on the project.



### **3.6. Social Accounting**

Rather than being a tool in itself, this is an approach to reporting, which relates to the social, environmental and financial impact which an organisation has had. It also considers the extent to which an organisation is meeting its social or ethical goals.

This method of accounting moves away from traditional financial metrics and seeks to demonstrate accountability to a wide range of stakeholders. Several housing organisations were among the pioneers of social accounting alongside the fair trade sector in the 1990s. The approach now has a wide take up and includes a variety of approaches. There are many organisations offering training in Social Accounting and the cost will vary dependent on the approach.

A group of four housing organisations are currently working with a consultant on a social accounting process, receiving training and support. Three of the organisations who are piloting this approach took part in the research. Although they have not completed the process and did not feel they could comment on its effectiveness, all organisations mentioned the large investment of time that was needed. This was especially in the case of stakeholder consultation, and as an organisation, they felt they needed to ensure that this is time which is well invested and will result in a process that is not too onerous. They all said that once the process has been completed, they will assess whether it is a feasible option and see what other areas of work it could be extended to, although Foyer's seemed to be a natural choice.

A potential barrier cited by respondents was gaining the organisational buy-in and ensuring that all staff had an understanding as to what the tool could do for the business.

### **3.7. Social Return On Investment (SROI)**

SROI maps out the value of the work of an organisation by placing monetary values on social outputs, which is then represented by a ratio which states how much social return is gained from £1 of investment. It includes assessing the impact of social intervention made in preventing further social costs. It has been actively promoted by the SROI network and was strongly supported by the previous Labour government.

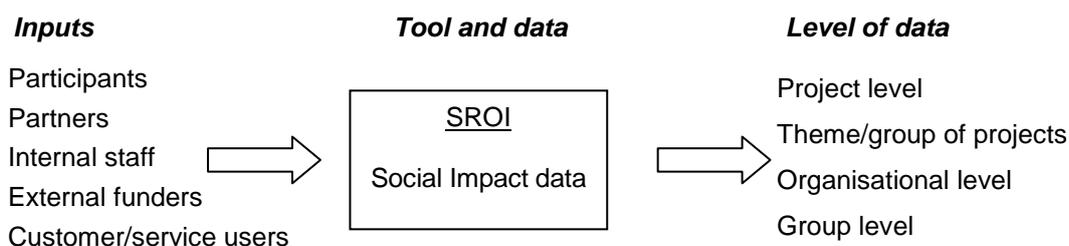
Although there are many models and approaches, it is based on the following seven principles:

- involving and consulting stakeholders;
- understanding what changes;
- value the things that matter;
- only include what is material;
- do not over-claim;
- be transparent; and
- verify the result.

**Table 9: SROI: respondent's experience**

Number of respondents	1
Average effectiveness Rating	5
Most tangible benefits to the organisation	<p>A recognition of the social regeneration activities of the organisation and the opportunity to ascribe a real value to them.</p> <p>The process has proved to be as interesting as the judgements and outcomes and provides really useful analysis and debate about relative merits and impacts.</p> <p>The availability of comparative SROI data.</p>
Issues	Very happy with the approach but would look at ways to make it less resource intensive so it can be used on a more frequent basis.
Plans to address these	None
Costs	External consultancies may charge a range of fees to validate a SROI analysis.
Supplier and link	<p>The SROI network</p> <p><a href="http://www.thesroinetwork.org">www.thesroinetwork.org</a></p>

In a similar vein to the Business in the Community measurement tool, this approach is comprehensive in both the inputs into the process and the resulting data as shown in the table below.



### 3.8. TP Tracker

The supplier's website states that it is a tool for 'recording, measuring and benchmarking tenant participation and feedback'. This web-based database of residents can be linked to a housing management system and the standard tool comprises of 3 modules:

- tenant participation;
- customer satisfaction; and
- community regeneration.

In addition to those core modules, there are two additional modules which increase the amount of information stored. They are:

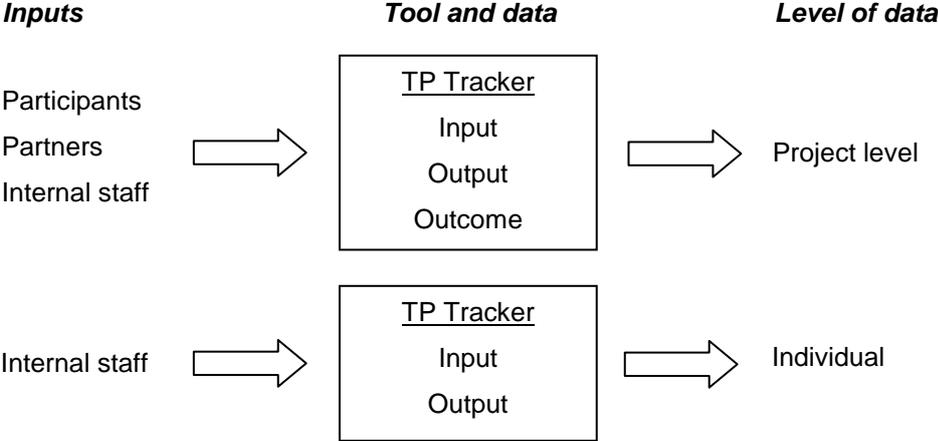
- Impact Tracker which includes expenses and other costs of participation, staff and other stakeholders involvement. It records planned or unexpected outcomes; and
- a diversity monitoring module which analyses the differing levels of engagement by ethnic groups.

The website states that there is an opportunity to tailor the software to an organisation’s needs as well as providing opportunities to benchmark. Over 40 housing organisations subscribe to TP Tracker.

**Table 10: TP Tracker: respondents’ experience**

Number of respondents	2
Average effectiveness Rating	4.5
Most tangible benefits to the organisation	<p>It has provided the organisation with more structured and relevant data.</p> <p>The ability to compare with other organisations.</p> <p>The current number of participating residents is now known in addition to whether that number is increasing and knowing who wants to be involved.</p> <p>Customer satisfaction data.</p> <p>Used alongside case studies</p>
Issues	<p>Need an individual to oversee the data input and ensure quality .</p> <p>Pulling off reports is not as easy as it could be.</p> <p>How effectively the data is used within the organisation is an issue.</p> <p>The impact module of the tool is not being used as the outcomes need to be better defined.</p> <p>Not sure of its capability and full functionality.</p> <p>Trying to get all staff to use it so that tenant empowerment can be seen as integral to the organisation not located within one team.</p>
Plans to address issues	<p>Looking at how outcomes could be made clearer.</p> <p>The supplier has been informed that the reporting would benefit from being simplified.</p>
Cost	<p>£4,000 annual fee</p> <p>£25,000 purchase cost</p>
Supplier and link	<p>Arena Partnership</p> <p><b><a href="http://www.arenapartnership.co.uk">www.arenapartnership.co.uk</a></b></p>

The two responding organisations used the tool in differing ways resulting in different inputs and outputs being produced as shown in the diagrams below.

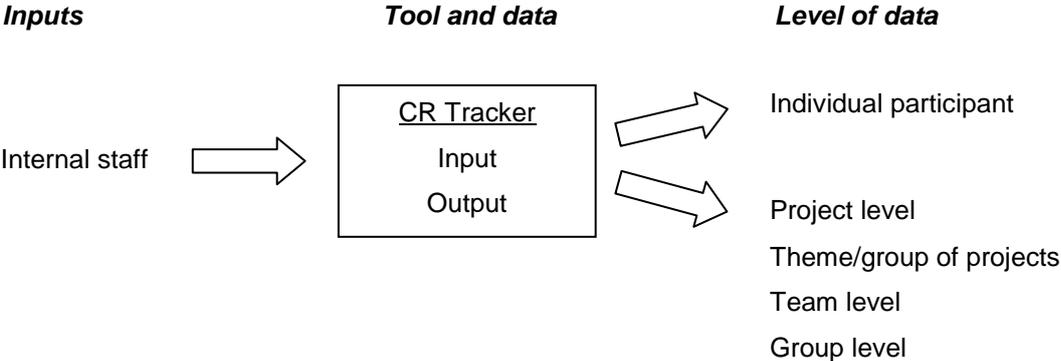


**3.9. Community Regeneration (CR) Tracker**

One housing association worked with the developers of TP Tracker to include additional functionality to the original TP Tracker tool. This includes the ability to aggregate outputs from across a housing group, the value of the time which is invested by partner organisations and inputs from other agencies.

The housing organisation rated the effectiveness of this tool as 5 and stated that tangible benefits to the organisation included the Value for Money data and the efficiency of projects. This allows them to look at how much money has been invested within a community, what the result of this has been and the efficiency of the project. If the intended benefits are not being gained by tenants, they can question whether it is the right project for that area or whether the right people are delivering it. At the end of each project there is an evaluation which captures lessons learnt and can be used for guidance by staff setting up new projects.

The inputs into the tool are provided by internal staff and the data produced is at both the individual level and the project level which can be aggregated to higher levels.



### 3.10. Verto

This web based tool was originally designed for local authorities, in partnership with Peterborough City Council, to assist in the monitoring and evaluation of community services with a focus on performance improvement. It allows for benchmarking across users.

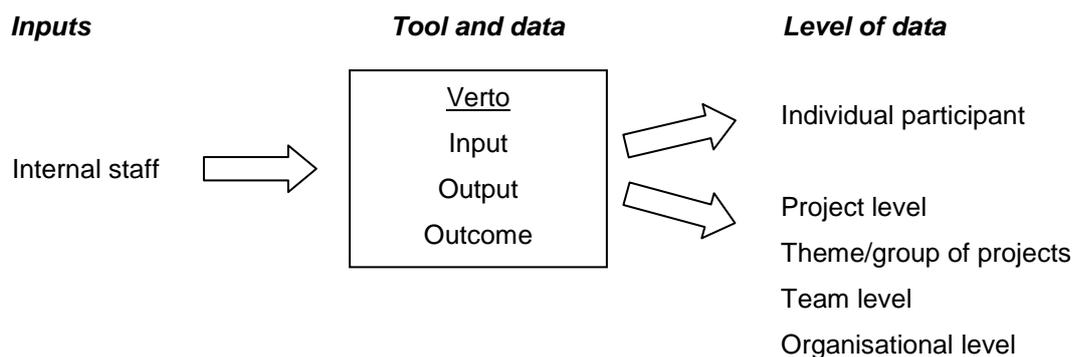
The tool has three modules which include details of all funding applications, the business case for projects and live project information.

The organisation originally had this tool as a project management tool and decided to adapt the three modules for use within community investment as there would be no need for additional training due to their awareness of the tool. They are currently in the pilot phase and may further adapt the tool to incorporate cost/benefit analysis in the future.

**Table 11: Verto: respondent's experience**

Number of respondents	1
Average effectiveness Rating	3.5
Most tangible benefits to the organisation	Actually collecting outputs and outcomes and being able to share information and advise others. Information within the tool can be used to input into funding applications.
Issues	The information is too quantitative at the moment and more socially focused measures are needed.
Plans to address issues	Develop and integrate softer measures.
Cost	n/a
Supplier and link	tmi systems <a href="http://www.tmi-systems.com">www.tmi-systems.com</a>

The following table shows the data going into and arising from the tool. The usage is not consistent across the organisation at the moment and some departments may currently include more than others. It generates data at both an individual and project level.



### 3.11. Views / SPRS

Previously known as SPRS, this online platform states that it can help to demonstrate the value and outcomes of an organisation's work. It maps and measures the progress of participants by building up detailed case histories of individuals and groups. This progress can then be measured against set outcomes. This data can then be aggregated to analyse the impact of the progress against corporate objectives.

The suppliers state that bespoke reports can be created for different funders. It currently has 350 subscribers across a range of sectors (Meghani, 2011).

**Table 12: Views: respondents' experiences**

Number of respondents	2 (but only one felt able to rate its effectiveness)
Average effectiveness Rating	3.5
Most tangible benefits to the organisation	<p>Information on outcomes.</p> <p>On a half yearly basis, the number of people supported can be reported together with their outcomes (chosen by the young people).</p> <p>The output data which is all captured in one place. Also the journey of an individual can be captured, using this an analysis of interventions with individuals at a postcode level can be undertaken review types of projects by geography.</p> <p>Activities across different funding streams can be reviewed and compared.</p> <p>Projects can be shaped and focused and decisions made around what is considered to be a good use of investment.</p>
Issues	<p>Both organisations began using this tool for their youth work, which reflects the focus of the predecessor of this software (SPRS).</p> <p>One organisation has since adapted it to measure their construction projects.</p> <p>The wider impact of projects could be analysed in greater depth.</p> <p>It would benefit from greater integration of all Community Investment work.</p>
Plans to address issues	Currently looking at what could be done to measure impact at a higher level across the organisation and that may need a change of tool as it does not seem to be that adaptable.
Cost	<p>Cost per month for a single license is based on annual turnover</p> <p>Less than £250,000 - £50 per month</p> <p>£250,000 - £1million - £100 per month</p> <p>£1million - £5million - £200 per month</p> <p>£5million+ -£400 per month.</p> <p>The organisations questioned paid subscriptions of £3,500 and £1,200 per annum including support and upgrading.</p>
Supplier and link	<p>Substance</p> <p><a href="http://www.views.coop">www.views.coop</a></p>



## 4. Internally developed tools

Twelve organisations which took part in the research were using their own internally developed impact measurement tools. This section will present the information in a slightly different format than that presented for external tools. The information collected will be reported collectively as will any issues with the measuring systems and how organisations plan to address them.

The type of systems which have been developed in house are wide ranging from those which are still paper based and filed individually to one which is being developed based on the Charities Evaluation Service Outcome Triangle. Adapting internal tools which staff are familiar with rather than needing to train staff on a new system was an important reason for having developed an internal tool.

Virtually all the internal systems have more than one user but one person has ultimate responsibility for overseeing the tool although the importance of the system being integrated into people's jobs was emphasised by a few organisations. One organisation which encourages all staff to use the system do so in order for all staff to see how the tool fits into their job and how they fit into the bigger picture.

Two organisations have recently subscribed to the Community Impact Tracking Service (CITs) and are waiting to see how useful they find it. One is using it alongside their internal system and the other has previously had evaluations undertaken by a University.

Two more are currently looking for an external measurement tool. One of which has put internal development on hold as they are undergoing change within their IT systems.

Other tools which have been explored by housing organisations include 'Stories of Change' and the Warwick-Edinburgh well-being scale.

Although it was not within the scope of this research to assess the tools, previous research (Mullins et al., 2010) which produced case studies of four organisations with in-house tools identified the advantages and disadvantages of such tools.

### Advantages

- can be developed to meet specific needs of the CI team and organisation; and
- can be low cost in using widely available software.

### Disadvantages

- lack of standardisation makes benchmarking difficult;
- costs of development and maintenance fall on the individual organisation. There may be difficulty in accessing corporate IT development or problem-solving time; and
- training and quality control systems have to be internally resourced. The case for specialist monitoring/analyst posts may be stronger. The system may be 'cheap' but if an in-house analyst is needed, then the association's overall costs could be higher.

#### **4.1. Link to Key Performance Indicators**

Half of all organisations with internally developed measurement tools stated that data generated through them was directly linked to their corporate KPIs. A further third reported no linkage. Where there was not a direct link, two said that the data was linked to staff KPIs, and one was linked to the community development strategy. One respondent expressed their opinion that development of KPIs for community investment is impossible.

#### **4.2. The most useful data and information**

Respondents were questioned on what they believed to be the most useful information from their measurement tools.

##### ***Financial***

Five housing organisations stated that it was the financial data, including analysing the cost of an initiative compared to what it had achieved which they considered to be the most important information. How the organisation compared financially to others was seen as useful. Another respondent emphasised the importance of fundraising data.

##### ***People focussed***

A further three housing organisations stated the ability to demonstrate their customer focus was the most important data. Using this, they can assess whether what is being delivered is what is wanted by tenants and they are able to gauge their level of satisfaction. Another organisation saw being able to assess the number of tenants who were engaged in activities as being important to them.

The human aspect was mentioned by two organisations. One stating that the case studies were invaluable in bringing projects to life and another housing organisation stated that being able to see the change in people, measure what they have got out of the project and their increased aspirations was the most important data for them.

A further aspect cited by one organisation was the chance to highlight how difficult some community work can be.

##### ***External data***

The integration of external data was seen as important for two organisations. The development of one internal system and the on-going relationship with external partners had allowed for a greater exchange of data and they could now, amongst other data, access police data in more detail enabling them to build more targeted projects. The other felt that reviewing what they were doing against their partners' strategic targets was of great importance.

Two organisations stated that being able to analyse the comparative position of neighbourhoods and tracking them on a regular basis was important. This follows area based indicator approaches such as the 'floor targets' used in evaluations of New Deal for Communities and other area based initiatives which use Census data and geographically based administrative data to track change over time. Such approaches are particularly relevant for housing organisations with a strong geographical focus such as stock transfers and community based housing associations (Mullins et al. 2010).

One organisation had commissioned further work into the function of particular neighbourhoods, concluding that a neighbourhood with consistently poor official deprivation figures may always remain so due to it being a transient neighbourhood for new arrivals who remained there until they were in a position to leave and were subsequently replaced by people in a similar position.

The integration of external data was seen as valuable in terms of focusing what projects should take place where.

#### ***Increased knowledge***

The data was seen as important to give staff the opportunity to reflect on the quality of what they deliver.

Other data which was seen as important was the ability to measure outputs and outcomes and the fact that the community investment team now had a linkage to three of the groups KPI's.

#### **4.3. Effectiveness of external tools**

Organisations were asked to rate how effective they perceived the tool to be in providing them with the data and information which their organisation required to measure impact. Eighteen organisations felt able to answer this question, which produced an average satisfaction rating of 3.7.

The average satisfaction rating produced by the 11 housing organisations which have internal tools was 3.2, considerably lower than the 4.2 average satisfaction rating with external tools. This was based on a scale of 1 to 5 with 1 being ineffective to 5 being very effective. Where organisations used more than one tool, each one was scored individually.

#### **4.4. Main weaknesses**

Having asked organisations about the effectiveness of the tool, anyone rating their tool less than a 5 was asked to explain the main weaknesses of the tool. The resulting comments can be seen as relating to the functionality or working of the tool or being linked to wider issues around how to analyse data to measure impact. Table 13 below splits the two issues and displays the weaknesses and any plans which the organisation has to address them.

**Table 13: Issues with the internally developed tools and plans to address them**

<b><u>Functionality of the tools</u></b>	
<i>Weaknesses</i>	<i>How to address them</i>
<b>It only provides a rudimentary understanding</b>	Currently looking at CITs but need to measure the resources needed to use it.
<b>Not fully automated so need to look at each individual record</b>	No plans as there is a feeling that the money should be invested in the community rather than on tools.
<b>Not as presentationally slick as it could be</b>	Working on making it more understandable for people who are new to the tool.
<b>Laborious to input all the data</b>	The organisation are new to the tool and hopes it will get easier as it is used more and it contains more data.
<b>Most of the information is qualitative which makes it difficult to build a robust evidence base</b>	No plans to address this.
<b>The tool is not able to isolate the impact of individual projects</b>	Looking at ways in which impact measurement can be improved.

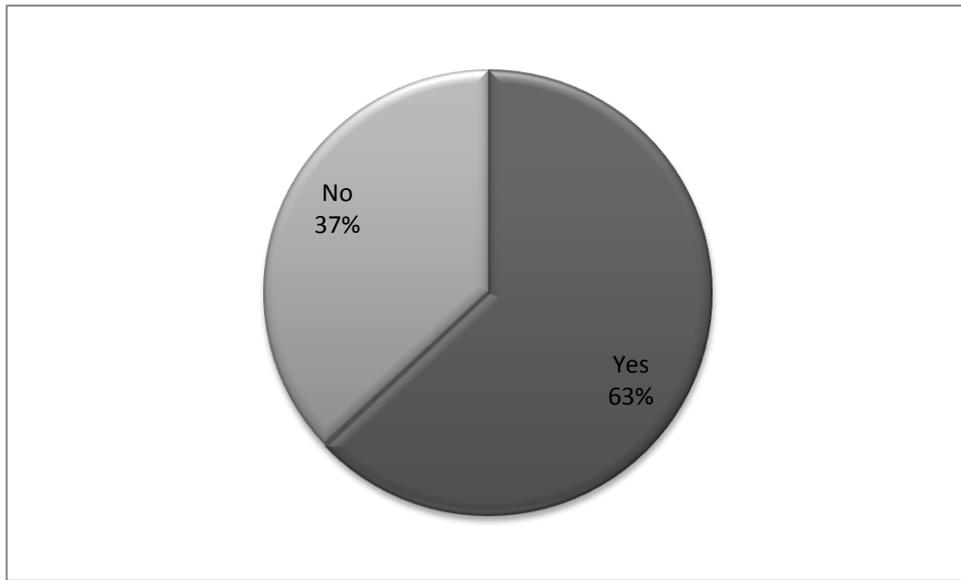
**Within the process of impact measurement**

<i>Weaknesses</i>	<i>How to address them</i>
<b>Issues surrounding the development of outcomes</b>	<p>Three organisations stated that the tools provided good management information but are less good at including and measuring outcomes.</p> <p>They also stated that it is hard to come up with good indicators so they are constantly developing them or tweaking them.</p> <p>Need to create or find a tool that reflects the new social care and health areas of work, so looking at what that sector utilises.</p>
<b>How the data is used and acted upon in-house was mentioned by two organisations</b>	<p>It's a cultural thing.</p> <p>One organisation has subscribed to CITs to explore how their methodology could be improved</p> <p>A few organisations mentioned that they are unsure how to make the best use of the data.</p>
<b>Struggle with accessing information to enable benchmarking</b>	<p>Three organisations would like to benchmark with their peers but struggle to get appropriate information, this was one reason forwarded for subscribing to CITs.</p> <p>One organisation has paused their work until the launch of the community investment database produced by the CIH.</p>
<b>Need to constantly update targets as the externally environment changes</b>	<p>External targets are always changing and need to keep up with them.</p> <p>Need to get better at horizon scanning to see what other people are doing both within and outside of our sector.</p>

## 5. Extent of social impact measurement

Housing organisations were asked whether all (or just some) of their community investment activities were measured through the tool. Of the 27 organisations which had a measurement tool in place 63% measured all community investment projects.

**Figure 4: Housing organisations where all community investment activities were measured**



Base: 27 respondents

The reasons forwarded from those organisations which did not measure all of the projects included:

- measurement is linked to the overall impact of projects rather than individual ones;
- only externally funded projects are measured;
- no hard and fast criteria is set as to which are measured, it is a judgement call which depends on the timing and circumstances;
- only certain types (themes) of projects are measured;
- some are measured in a more scientific way than others;
- the two organisations which are at the experimental stage with social accounting are focusing on one project each; and
- only the most significant ones are measured.

## 6. Previous tools which have been used

Perhaps surprisingly, given the amount of instability apparent from other aspects of the survey and the association of different tools with different external funding programmes, only four housing organisations reported that they had experience of using a different measurement tool which they now no longer use. Three of these were organisations which had previously used SROI. One of them had worked with a model which had been developed by a Local Authority and they were not convinced of the added value which it brought to their work so discontinued its use. The other two examples were linked to external funding. One of those had been asked to be a pilot study following the completion of the funded initiative. The external funder's staff were learning how to use the tool at the same time and it took a long time for them to produce the final report, this discouraged the organisation from pursuing that route again.

The other tools which had previously been used included the Outcome Star which was linked to a funded project and the organisation had ceased to use it on completion of the funding, although they may return to using it in the future linked to their work with young people. The Wheels of Wellbeing was also used by an organisation which had used SROI and cessation of funding was the reason it was discontinued.

## 7. The future of impact measurement

The respondents were asked whether they envisaged changing their measurement tool within the next 12 months. The following table contains responses from the 26 organisations which felt able to answer this question.

**Table 14: Whether housing organisations will be changing their measurement model within the next twelve months**

Response	Reason	External tool users	Internal tool users
<b>No</b>	Happy with current tool	8	0
	Waiting to see the success of the one we are currently using	1	
<b>Yes</b>	Looking around for alternative tool(s)	2	7
	Further develop the current tool(s)	1	2
<b>Don't know</b>		2	3
	<b>TOTAL</b>	14	12

Total responses: 26

Nearly 60% of respondents using externally developed tools did not envisage any change to them in the next 12 months. This is a startling contrast to those respondents using internally developed systems. Over 65% of these are considering changing their tools within the next 12 months.

### **7.1. Respondents with internally developed tools**

The need for better evidence for community investment and the need to move more towards social impact and outcome measurement were mentioned as reasons for changing models, primarily for those people using internal systems.

Responses varied between those who were aware of what needed to be changed to enable the organisation to measure its impact, for example, one respondent spoke of improving their system to include a tracking system; to those respondents who were still unsure of their approach in either measuring individual projects (of which there are many) or the impact as a whole.

One stated that they wished to improve their current model to address the constraints of data and include a scenario planning element.

There were concerns about the limitations of time and money with one respondent stating that they did not want to waste time and money looking for a holy grail which probably did not exist. There was also an acknowledgement that organisations are still at an early stage in their measurement process.

Three respondents felt that they needed to have more information regarding available tools and were clear that they did not want to overcomplicate the process. Several respondents emphasised the need to keep an open mind and keep up to date with the development of new tools and methodologies.

Two respondents had recently subscribed to CITS and were waiting to assess its applicability. While the limited ability to benchmark with and learn from other organisations is clearly a limitation of most internally developed tools, this was not specifically mentioned by survey respondents.

### **7.2. Respondents with externally developed tools**

Although the majority of respondents stated that they were unlikely to change their tool within the next 12 months, there was also a recognition that it was essential to keep an open mind with regards to new developments.

One organisation which stated that they would be changing their tool is in the process of developing an Outcomes Framework into which their current tools will feed data.

Two housing associations who responded with a 'don't know' are aware of the need to further investigate the functionality of their current tool and also recognise that they are at an early stage in the process.

## 8. The development of joint impact indicators or measures

Within meetings convened by HACT, there have been discussions concerning the development of joint indicators, measures or financial proxies. This is particularly relevant to local partnership working where it may be appropriate to agree a common approach with partners so that joint outcomes can be assessed. However, it is also relevant at a sector level where benchmarking between organisations and the compilation of a picture of sector impact are dependent of a degree of commonality in measurement. The National Housing Federation's Neighbourhood Audit is particularly valuable in this respect (NHF, 2008, 2012) as it provides an aggregate picture of inputs and outputs of community investment by housing organisations. However, there is much less progress in relation to joint impact and outcome measures. This research sought to quantify the extent to which housing organisations would like to be involved in the development of these.

The overwhelming majority of housing organisations agreed that this is something which they would be interested in. A few caveats were raised. These were:

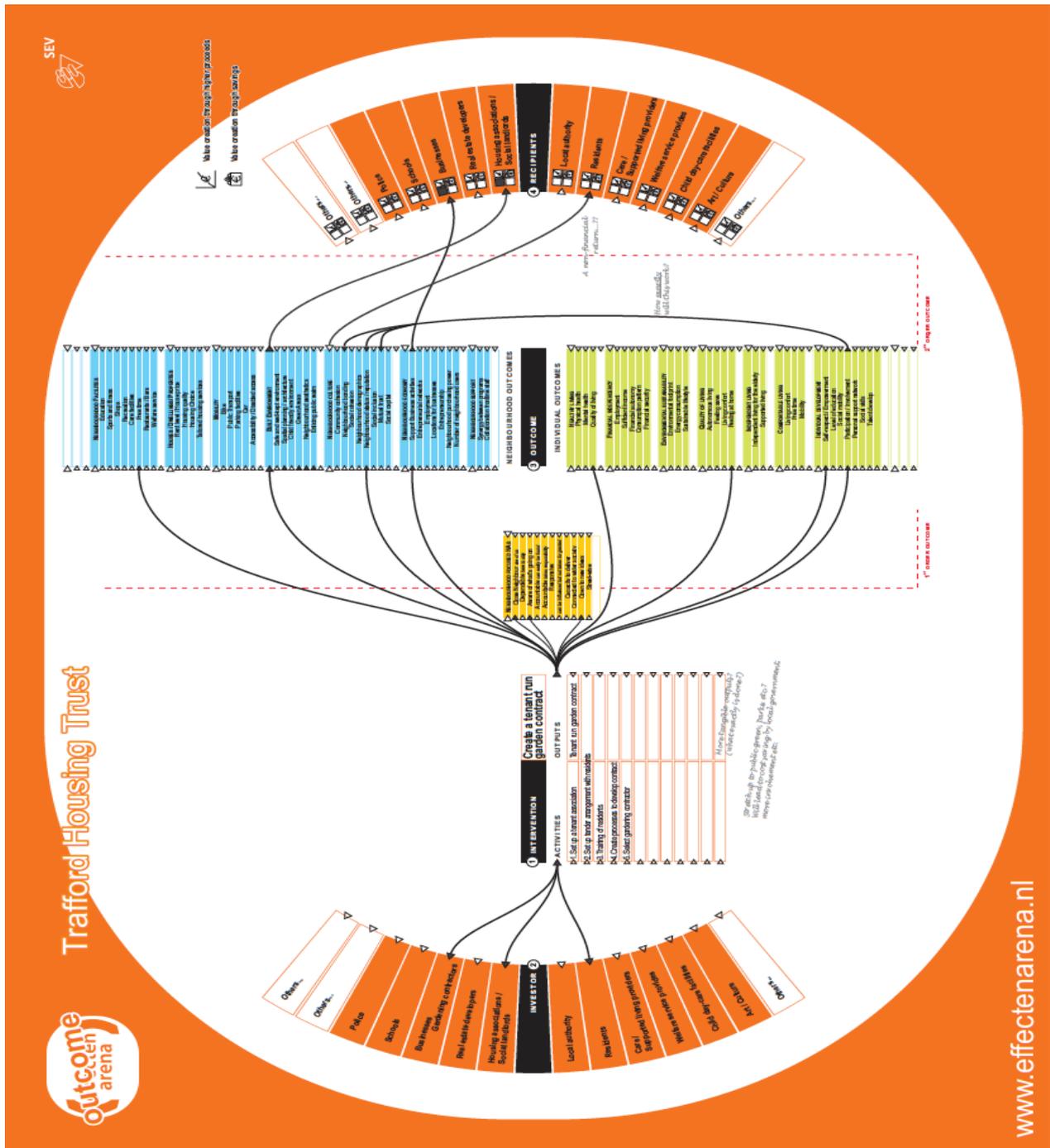
- The indicators would need to be appropriate for the smaller, as well as the larger, organisations;
- There was concern about the resources an organisation would need to put into such a process but there was a willingness to be a 'sounding board';
- The question of whether organisations wanted standardised measures was raised, something organisations need to consider; and
- Some concern was raised about duplication of effort given that there is already a regional grouping considering this issue.

While, partnership tools were not evident from survey responses, earlier research has identified the availability of several tools that lend themselves to collaborative planning and joint assessment of the impact of community investments. A notable example is the Outcomes Arena tool initially developed by researchers at the Dutch housing innovation body, SEV, and subsequently improved by the same researchers (Deuten, 2010) in an independent capacity and piloted in a collaborative project on the neighbourhood role of housing providers (Close Neighbours- van Bortel et al, 2011). Outcome Arena enables organisations to consider how they might invest in community projects and what returns they might expect for their organisation and others to derive from the investment, to explore intended outcomes for neighbourhoods and for individuals based on explicit theories of change. The Outcome is best drawn out in a dialogue session with 4 to 6 persons. Professionals can also make their own Outcome Arena by describing their intervention in a national open source knowledge base [www.watwerktindewijk.nl](http://www.watwerktindewijk.nl) and produce their description as a pdf-document. An Outcome Arena is a fruitful base for building a tailor made monitoring system or making a more advanced Cost Benefit Analyses. The Outcome Arena deserves wider attention from English social housing providers.<sup>5</sup>

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<sup>5</sup> Recent news from Jochum Deuten is that there is a growing interest in the Netherlands from neighbouring domains like social welfare and health. It is adopted by the Ministry of Internal Affairs / Housing in recent guidance for social-cost-benefit analysis, more and more housing associations are adopting the OA as a standard.

Figure 5: Outcome Arena Tool applied to Trafford Housing Trust's Close Neighbours Project

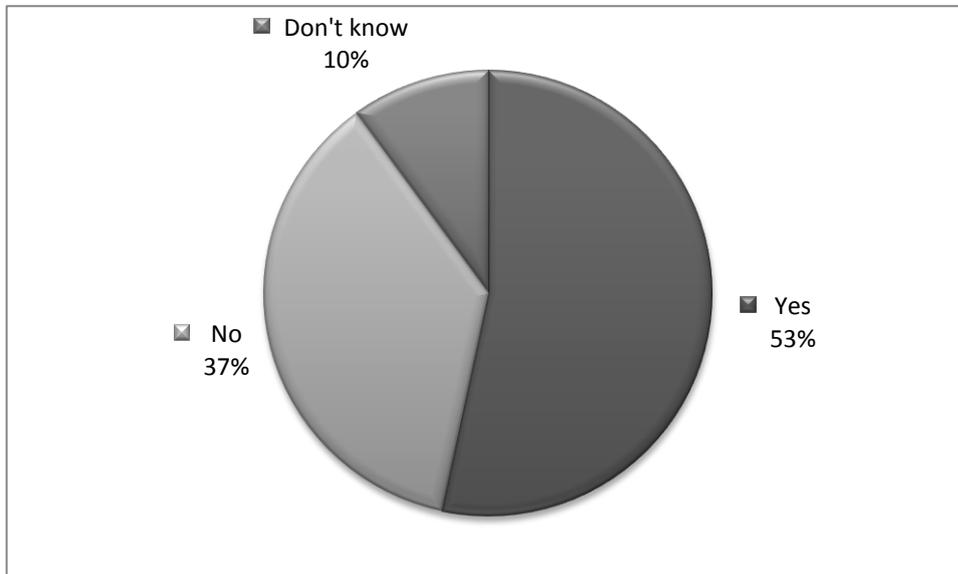


The example shown in Figure 5 is taken from Trafford Housing Trust's Close Neighbours project to involve sheltered housing residents in the procurement of grounds maintenance contracts shows how the tool enables users to identify who the investors and beneficiaries of the project are expected to be, what outcomes are anticipated for neighbourhoods and individuals, and the theory of change leading from project actions to these anticipated outcomes. This project was successfully implemented leading to replacement of large generalist national contractors with small local businesses who 'provided twice the service at half the price' - clear benefit of joint planning and co-production with sheltered housing residents.

## 9. Community grant funds

All responding organisations were asked if they had a community grant fund.

**Figure 6: Housing Organisations with community grant funds**

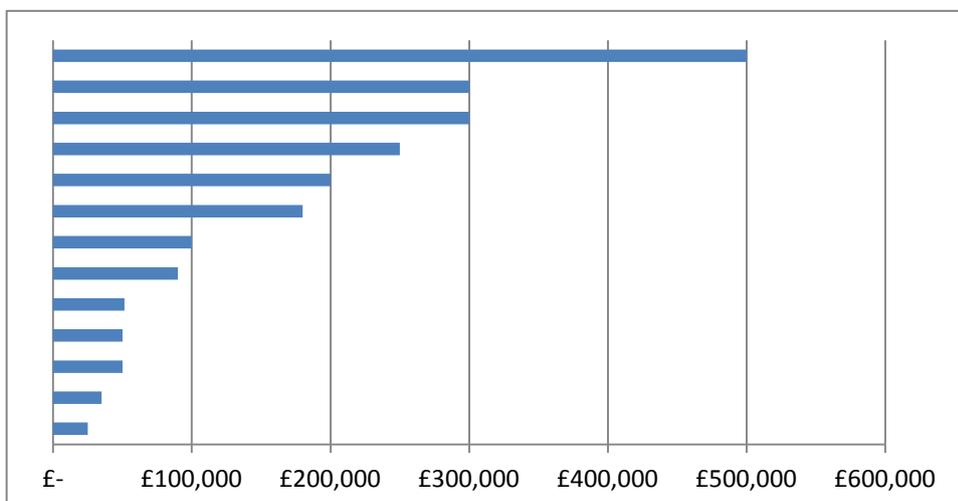


The 37% of organisations who do not currently have a community grant fund were asked if they had plans to introduce one, only one organisation said that they are intending to develop one.

The organisations who do not know whether they have a community grant fund cited other funds such as Resident Project, Community Chest and The Giving Fund.

Not all organisations were able to provide details of the funds available. The following chart shows the range of funding which is available through those housing organisations able to provide the information. The funds range from £25,000 through to £500,000.

**Figure 7: Funding available through Community Grant Funds**



Total responses: 13

### 9.1. Allocation of the funds

Respondents were asked how the funds were allocated and the responses are all quite different, so are listed below:

- The residents decide on a project and the budgets go to the neighbourhood management team.
- Decisions are made by a local Board. Each local Board is chaired by a member of the main Board. Each application has a maximum amount of £1,000.
- On a regional basis, each region has a panel of staff and residents. The organisation has tried to be prescriptive in the past but didn't work. The organisation look for local community projects up to £5,000, a panel then assesses them and officers help to deliver them.
- The decisions of what to fund is made by local residents who decide on the criteria to be used.
- All money this year has been used to support one project - the FISH shop - Financial Inclusion Services Hub.
- The organisation works in partnership with a Community Foundation. Applications are made and then presented to a panel of Board members and tenants.
- Annual commissioning is undertaken through a charitable board.
- Local area panels are given £5,000 each every year and they decide how to spend it.
- The strategy was set up by looking at previous projects. An application goes to a sub-panel which needs a sponsor and someone internally and the application is assessed by three different customer consultations.
- Detailed criteria based on Community Investment strategy. Applications need to meet key priorities. Panel of residents and staff and one independent person. The business case and social impact is assessed as well as benefits to the company.
- It is based on overall need and is part of an annual strategy for young peoples activity funding;
- Locally grants between £2,000 to £5,000. Centrally grants up to £10,000.
- Two grants for organisations and two for individuals.
- Residents bid into the fund for a max of £1,000 and a panel decide what projects will be run.
- Bids are entered into the organisation and considered by the relevant team. A decision is given based on information within the bid.
- With a local Foundation and Board Members, the maximum amount per grant is currently quite low so needs to be reviewed.
- There are four areas and each area has a area panel made up of eight residents and four independents and they judge each project against set criteria.
- At the moment, there are four member organisations and each one has a pot of money put aside which is tied to resident involvement. This is seen as essential when trying to balance the conflicting pressures of centralised delivery by having these funds at a local level.

## 9.2. Measurement of the projects

Those organisations with a Community Grant Fund were asked if the projects funded through it were measured. Over 56% of projects were measured and where measuring tools were in place, this was the primary way in which they were measured. However, there was some flexibility on the extent of measurement dependent on the type of project, and in these cases, evaluation criteria would be agreed.

Nearly 20% of housing organisations did not measure or evaluate projects funded through their Community Grant Funds at all. A further 13% said that the projects would be measured in the future when they have decided on their impact measurement system.

## 10. Conclusion

The research has shown that measurement in its broadest sense is extremely diverse across the sector, reflecting the inherent differences within the sector and the difficulty of the task. Even those housing organisations who have fairly established systems have highlighted the weaknesses within their approach and areas which need to be improved. Not one housing organisation was completely convinced that their current approach was the solution to all of their needs.

Satisfaction levels were generally higher with those tools which had been developed externally although many respondents acknowledge that they are probably not using them to their full functionality. The need to improve or change systems was more frequently cited by those organisations with systems which have been developed internally.

All housing organisations acknowledge that this is an increasingly important area which needs to be tackled but is not without its tensions. Those tensions range from the diversity of the sector and the need for the differences in community investment activities between organisations to be acknowledged to tensions relating to the day to day task of inputting data rather than spending time in the community.

As the area of social impact measurement is high on the agenda at the moment, there is also concern within the sector about potential duplication of effort resulting from a number of groups and organisations wanting to address this area of work. There is a clear benefit in more collaborative sharing of ideas to consider how much impact different approaches to community investment can have. At a time of political scepticism about the role of social housing it is important to establish what evidence there is of a wider community impact.

## 11. Recommendations

### ***Joint working on impact measurement***

The majority of organisations were in favour of combining efforts and working jointly on indicators. However, a few caveats were mentioned during this research. Some organisations are wary of the level of resources which they would need to commit to such an exercise and thus there should be varying options for involvement.

A few respondents echoed some of the concerns aired within the meetings, mainly concerned with benchmarking. The purpose of the development of joint indicators should be explored, together with discussions surrounding their usage and any potential issues which may arise.

### ***Co-ordinate joint learning***

The quote “what does good look like?” sums up some of the feelings from respondents. They have grasped the concept and know they need to move in a certain direction, but some support could go a long way. Rather than demonstrating what some organisations have done and presenting the end result, it may be worth identifying the necessary steps towards impact measurement and what is involved in each of those stages. The NPC publication ‘A journey to greater impact’ suggests the different stages which are involved, this suggestion could be built on to develop a programme of meetings in which each stage could be analysed by participants and alternative solutions discussed taking on board the characteristics of that organisation.

## Questionnaire Community Investment: Measuring the Impact

Date of completion:

Name of respondent:

Telephone number:

Job title:

Housing Association:

Size / stock level:

Part of a group?

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### Section 1: Community Investment Activities

**1.1** What are the main community investment activities undertaken by your organisation?

*This is defined as anything which your organisation provides over and above the provision of basic housing management to build sustainable communities. It does not include housing services and activities funded by the Supporting People programme.*

*(See definition sheet for examples)*

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### Section 2: Impact Measurement in your organisation

**2.1** Do you currently, or have you ever tried to, measure the impact of community investment activities?  
Yes / No

*(By impact, we mean all consequences of the project, whether intended or not* If no, thank and close  
*See definitions sheet for further clarification)* If yes, go to Q 2.2

**2.2** What were the main reasons your organisation started to measure the impact of your community investment activities?

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**2.3** Are you currently measuring impact? Yes / No  
If yes, go to Q 2.5  
If no, go to Q 2.4

**2.4** Why did you stop trying to measure impact?

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**2.5** Are all your community investment projects measured through an impact measurement tool  
Yes / No  
If yes, go to Q 2.7  
If no, go to Q 2.6

**2.6** If no, which ones are measured?  
\_\_\_\_\_  
\_\_\_\_\_

***I am now going to ask you about the different impact measurement tools which you use in your organisation.***

**2.7** Thinking about the tool(s) your organisation currently uses, please could you provide details of them beginning with the one which is used most extensively please?

Name of tool A: \_\_\_\_\_  
Supplier \_\_\_\_\_

Name of tool B: \_\_\_\_\_  
Supplier \_\_\_\_\_

**2.8** Have you ever used a different measurement tool apart from those you have just provided details of?  
Yes / No  
If yes, go to Q2.9  
If no, go to Q 3.1

**2.9** If yes, what was it called?  
\_\_\_\_\_

**2.10** Who was the supplier?  
\_\_\_\_\_

**2.11** What are the main reasons for not continuing its use?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Section 3: Details about the current measurement tools**

This section will ask questions about the measurement tool(s) which are currently used by your organisation and be repeated for each measurement tool.

Tool A (as stated in Q2.5) *[questions to be repeated for tool B, C etc]*

**3.1** Name of tool (bring forward)  
\_\_\_\_\_

**3.2** Can you briefly describe the tool (what it aims to do and the data it produces)  
\_\_\_\_\_  
\_\_\_\_\_

**3.2** Was this tool *developed by the organisation* or bought in from *an outside supplier* (delete as appropriate)

**3.3** Are there any fixed costs associated with the use of the tool? Yes / No  
*Such as initial purchasing costs, yearly subscriptions, membership or support fees?*

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**3.4** Are you able to provide me with details of these costs?

**3.5** What staffing resources are dedicated (required) to it?

*Such as internal staff costs or external personnel costs to input and analyse the data or staff specifically employed to use and support this tool?*

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**3.6** Thinking about the inputs into the measurement tool, which stakeholders views and/or experiences are included?

- Participants of the relevant project
- Partners (stakeholders) in the project
- Internal staff
- External funders
- Other, please specify \_\_\_\_\_

**3.7** At what level(s) does the measurement tool produce data?  
*(please see definition sheet for clarification)*

- individual participant
- Project level
- Theme / group of projects
- Team level (CI team)
- Organisational Level
- Group level
- Other (please specify)

**3.8** What type of data does it produce?  
*(please see definition sheet for clarification)*

- Input data
- Output data
- Outcome data
- Social Impact
- Other (please specify)

**3.9** At what geographic level is the data produced?

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**3.10** Is the data linked to any corporate reporting data, Key Performance Indicators for community investment or measurement data used by the organisation?

If yes, go to Q 3.12

If no, go to Q 3.11

**3.11** If not, how is the data used alongside the main corporate reporting data of the organisation?

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**3.12** How effective would you say the tool is in providing the data and information which your organisation needs to measure impact?

On a scale of 1 to 5 with 1 being not very effective to 5 being extremely effective

1      2      3      4      5

If less than 5, go to Q 3.12

If 5, go to Q 3.17

**3.13** If less than 5 – What are the main weaknesses of the tool

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**3.14** Are there any plans to alter the ways in which you use the tool to address these weaknesses?

Yes / No

Probe

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**3.15** What is the most useful data or information which is produced by the measurement tool?

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**3.16** Is information from the tool used to inform the development or management of projects?  
Yes / No  
If yes, go to Q3.17  
If no, go to Q3.18

**3.17** Could you provide an example of this?

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**3.18** What have been the main tangible benefits to the organisation of using the tool?

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*Repeat this section for each measurement tool*

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#### **Section four: Partnership working**

**4.1** Have you worked with any other organisations to develop or use this tool (e.g. joint assessments of impact)?  
Yes / No  
If yes, go to Q4.2  
If no, go to Q 4.5

**4.2** What are the main reasons for partnership working?  
*probe for whether it was for strategic or operational reasons*

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**4.3** Which organisations were involved?  
*Probe for type of partners / organisations.[expand as required]*

1) \_\_\_\_\_  
2) etc \_\_\_\_\_

**4.4** For each of the partners mentioned above, could you explain at what stage of the process did joint working begin and for what purpose?

*Such as the initial development of the measurement tool(s), joint purchase, agreement on a common approach or definitions or future planning?*

1) \_\_\_\_\_

2) etc \_\_\_\_\_

**4.7** Have you used the tool to measure the impact of locally based collaborations with partners (e.g. in specific neighbourhoods)?

Yes / No

**4.8** Have you used the tool to measure the contributions of partners to ‘vertical’ supply chain type collaborations to deliver services (i.e not area based)

Yes / No

**4.9** Is joint working on impact measurement something which your organisation would want to pursue / increase in the future?

Yes / No

If yes, go to Q4.11

If no, go to Q4.10

**4.10** What are the main reasons why your organisation does not want to increase joint working?

**4.11** What type of organisation(s) are you likely to increase joint working with?

\_\_\_\_\_  
\_\_\_\_\_

## **Section 5: Community Grants Fund**

**5.1** Do you currently have a Community Grant Fund?

Yes / No

If yes, go to Q5.3

If no, go to Q5.2

5.2 Do you have plans to have a Community Grant Fund?

Yes / No

If yes, go to Q5.4

If no, go to Q6.1

5.3 How much money do you intend to allocate in the current year?

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5.4 How is the strategy for allocating funding developed?

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5.5 Do you measure the impact of any of the projects funded through this grant?

Yes / No

If yes, go to Q 5.6

If no, go to Q 6.1

5.6 How are they measured?

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## Section Six: The Future

6.1 Do you envisage changing your impact measurement tool(s) within the next 12 months?

Yes / No

If yes, go to Q 6.2

If no, go to Q 6.3

6.2 If yes, why?

*Probe for what alternative approach may be taken*

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**6.3** What are the main lessons learnt about trying to measure social impact since you have starting to measure it?

---

**6.4** Would you be interested in working together with other housing organisations to develop joint measures or indicators for impact measurement?  
Yes / No / DK

---

As part of this research, I will be trying to find out more about the tools in terms of what they can measure, the main advantages and disadvantages. Is there any material which describes the tool(s) which you are using and its uses either in the public domain or which you would be willing to make available to me which would help this?

Also, I am looking to recruit a small number of housing organisations to do an in-depth case study of how they measure social impact, would you be willing to be part of this research?  
Yes / No

If yes, offer further details and take a relevant contact name and email address.

Q: Have you completed the National Housing Federations Neighbourhood Audit Questionnaire  
Yes / No

Thank you very much for your time

Would you like a copy of the final report?

Email address to send it to.

## **Community Investment: Measuring the Impact Definitions**

This sheet has been compiled to try and clarify certain concepts and definitions. It will be useful prior to the interview for there to be agreement between interviewer and interviewee on what the definitions mean to your housing association. If there is need for clarification on any other terminology used in the questionnaire, this too can be discussed.

### ***Community Investment Activities***

This refers to anything your organisation provides in addition to basic housing management to build sustainable communities (for example in employment and training and financial inclusion work and by investing in neighbourhood facilities). It does not include housing services and any work undertaken within the Supporting People Programme.

The term 'Community Investment', also sometimes referred to as 'Housing Plus', is commonly used in the social housing sector to refer to neighbourhood services and other non-core housing management activities (NHF, 2008). In addition to their primary role as social housing landlords and developers, HAs also leverage their local presence to deliver a wide range of additional services at a neighbourhood-wide or community level, rather than offering services to just their residents.

The list below provides examples of the types of community investment activities undertaken by housing organisations:

- Additional police patrols
- Preventing Anti-Social Behaviour
- Celebrating the community
- Crime support – offender and witness support
- Stronger communities projects
- Domestic violence initiatives
- Youth diversionary measures Adult education (formal and informal)
- After school and breakfast clubs / studies / activities
- School engagement projects
- Capacity building training for residents
- Get Active programmes
- Language and literacy support
- Business start-up initiatives / supply of business units
- Full employment pilots
- Environmental projects
- Intermediate labour market projects
- Abandoned vehicle removal
- Art / street decoration in public places
- Energy efficiency measures
- Handyperson schemes Life skills for employment
- Community health workers / drugs / alcohol workers
- Family intervention initiatives
- Food co-ops
- Health clinics Assistance with opening bank accounts
- Financial literacy training
- CAB money advice
- Credit Unions
- Fuel poverty initiatives
- Money / debt advice

Additionally, Social Impact is a term which is used across the third sector but may be used by some housing organisations. It refers to the impact which a project or group of projects has had on a community or communities. It is usually measured after the outcomes have been measured and its impact may be broader than the intended original participants.

*Q3.6 At what level does the measurement tool produce data?*

The response should indicate all levels at which the measurement tool can produce data.

Level	Description
Individual level	The data would provide data/information on each participant in the project
Project level	One data set (set of information) can be produced giving data on all participants in the scheme. This may also include financial and other resource information.
Theme / Group of projects	One set of data can be produced for more than one project. This could relate to a set of projects, such as all projects relating to economic wellbeing. A group of project may also comprise of more than one project receiving money from the same funder.
Team level (C.I. team)	This refers to one set of data which includes all the measured projects within one team or department.
Organisational level	The data / information is output as results for the whole organisation.

*Q 3.8 What type of data does the measurement tool produce?*

Type of data	Definition <sup>6</sup>
Input data	This refers to all the resources you put into the project to enable you to deliver your outputs. Inputs may include time, money and premises
Output data	These are all the products and services you deliver as part of your work. Examples of outputs are: training courses, support sessions and publications.
Outcome data	Outcomes are the changes, benefits, learning or other effects that happen as a result of your work. They can be wanted or unwanted, expected or unexpected.
Social Impact data	This information refers to the effect(s) of a project at a higher or broader level, in the longer term, after the outcomes have been achieved. It often describes change in a wider user group than the original target, and may refer changes in the social fabric of an area.

If there are any further questions, please contact Vanessa Wilkes at [vew930@bham.ac.uk](mailto:vew930@bham.ac.uk)

<sup>6</sup> As defined by the Charities Evaluation Service

## Appendix 2: Where to find out more: additional tools and guidance not currently used by respondents

### Your Value!

During the course of the research, a new tool was launched by Community Matters. The website ([www.communitymatters.org.uk/yourvalue](http://www.communitymatters.org.uk/yourvalue)) states that it is an online assessment tool for groups to demonstrate their social, economic and environmental impact. The license costs £100 plus VAT per annum.

### Useful weblinks

The following is a link to a Charities Evaluation Service (CES) publication which contained information on 14 different measurement systems which are currently available. <http://www.ces-vol.org.uk/index.cfm?pg=416>

Additionally they have produced an Outcome and outcome indicator bank. <http://www.ces-vol.org.uk/downloads/outcomeandoutcomeindicatorbanks-786-794.pdf>

The following report from New Philanthropy Capital reports on six charities that have learned to measure better. The report also contains FAQs on barriers.

[http://www.philanthropycapital.org/publications/improving\\_the\\_sector/improving\\_charities/journey\\_to\\_impact.aspx](http://www.philanthropycapital.org/publications/improving_the_sector/improving_charities/journey_to_impact.aspx)

The following link is to a guide to over 20 quality and social impact tools, free to download, produced by the New Economics Foundation. <http://www.neweconomics.org/publications/tools-you>

The Every Child Matters Framework which was being explored by a respondent can be found at: <https://www.education.gov.uk/publications/standard/publicationDetail/Page1/DCSF-00331-2008>

'The Guild' have published a guide to the process of developing impact measurement tools drawing on research and a knowledge transfer partnership with Third Sector Research Centre at Middlesex University. *Getting Started in Social Impact Measurement*: a published Guide that helps you identify what tools are available and which ones will suit the needs of your organisation. The simple 'how to do' style is targeted at smaller TSOs and may suit small housing associations looking at impact measurement for the first time Available free in electronic format by emailing [services@the-guild.co.uk](mailto:services@the-guild.co.uk).

Outcome Arena. [www.effectenarena.nl](http://www.effectenarena.nl) (in Dutch) / [www.watwerktindewijk.nl](http://www.watwerktindewijk.nl) (expected to be public from summer 2012)

SROI Network <http://www.thesroinetwork.org/>

The Social Impact Analysts Association <http://siaassociation.org/>

Inspiring Impact Group, a group which have recently come together with a decade long plan to encourage and instil impact within organisations

[http://www.philanthropycapital.org/publications/improving\\_the\\_sector/improving\\_charities/inspiring\\_impact.aspx](http://www.philanthropycapital.org/publications/improving_the_sector/improving_charities/inspiring_impact.aspx)

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## About the Centre

The third sector provides support and services to millions of people. Whether providing front-line services, making policy or campaigning for change, good quality research is vital for organisations to achieve the best possible impact. The Third Sector Research Centre exists to develop the evidence base on, for and with the third sector in the UK. Working closely with practitioners, policy-makers and other academics, TSRC is undertaking and reviewing research, and making this research widely available. The Centre works in collaboration with the third sector, ensuring its research reflects the realities of those working within it, and helping to build the sector's capacity to use and conduct research.

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[www.tsrc.ac.uk](http://www.tsrc.ac.uk)

## Service Delivery

From housing, to health, social care or criminal justice, third sector organisations provide an increasing number of public services. Working with policy makers and practitioners to identify key priorities, this work will cut across a number of research streams and cover a series of key issues.

Critical understanding service delivery by the third sector is important to policy making as the third sector now provides a major - and very different - option for public services, which may be more responsive to the needs of citizens and service users. At the same time, there are dangers inherent in the third sector becoming over-dependent on funding from service contracts – particularly in terms of a potential loss of its independence. The centre's research will help to inform the debate on the way in which service delivery is developing, the potential role of the third sector in commissioning as well as contracting, and the implications of different approaches to service delivery on the overall impact of the third sector.

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