

Socialsuite

Organisational Readiness Toolkit:

**SIX STEPS TO BECOMING AN OUTCOMES-DRIVEN  
ORGANISATION**

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# 1. Are you ready for change?

As funding in the not-for-profit sector is becoming harder and harder to secure and funders are demanding to see proof of outcomes being achieved, a handful of organisations are adopting Social Outcomes Measurement as a means to build a strong business case, with varying levels of success.

Funding aside, there are also many organisations who choose to measure their outcomes to understand how they are having an impact on their beneficiaries; and how they can continue to improve service delivery.

Key success factors to measuring outcomes is the capacity, capability and commitment of an organisation to implement change.

Before embarking on your outcomes measurement journey, it is important to first assess your organisations readiness to implement this change.

Social Outcomes Measurement is simply described as the process to assess the extent to which a program has achieved its intended results.

The purpose of this toolkit is to get your organisation ready to start measuring social outcomes. At the end of the exercises you will have a better understanding of what your organisation needs to do to lay strong foundations to establish a culture of social outcomes measurement.

So let's get started.

# 1. Social outcomes measurement... are you ready for change?

## WHAT IS A SOCIAL OUTCOME?

The benefit to program participants and all related stakeholders as a result of a program, service or intervention. Outcomes relate to changes in things such as behaviour, attitude, knowledge, skills and values. They can be short, medium or long-term outcomes.

## COMMON DRIVERS FOR SOCIAL OUTCOMES MEASUREMENT IN A NOT-FOR-PROFIT ORGANISATION

- ✓ To improve outcomes for service users and program beneficiaries
- ✓ To improve services and programs
- ✓ For external reporting purposes
- ✓ To satisfy funder reporting requirements
- ✓ To motivate front-line staff with visibility of program and service results

## Common Challenges faced by not-for-profit organisations

- ✓ **Lack of access to established outcomes measurement metrics and tools**
- ✓ **Lack of funding and access to resources**
- ✓ **Lack of staff capability**
- ✓ **Limited capacity and time**
- ✓ **Lack of support and buy-in from all staff**
- ✓ **Lack of participation from clients/beneficiaries to provide data**
- ✓ **Lack of interest or support from board and senior management**
- ✓ **Diversity in service delivery and funder reporting requirements**

# 1. Social outcomes measurement... are you ready for change?

At least 80%\* of donors prefer to donate to a charity that can prove its results with evidence.

Organisations that go beyond inputs and outputs reporting are more likely to earn the trust of their donors.

## INPUTS

A resource allocated to or consumed by a program

For example:

- Funding
- Staff time
- Facilities
- Equipment

## ACTIVITY

A program component or service delivered

For example:

- Workshops
- Information sessions
- Networking groups
- Case management

## OUTPUTS

Direct **quantitative** products of a program activity

For example:

- Number of workshops delivered
- Number of beneficiaries served
- Number of staff hours allocated to running the information sessions

## OUTCOMES

The **benefit** to participants during and after program completion. Outcomes relate to changes in things such as **behaviour, attitude, knowledge, skills, values**

For example:

As a result of participating in a Youth Mentoring Program, young participants have achieved increased social competencies such as confidence, skills and resilience.

\* Based on a poll of 124 people

## 2. Your journey to becoming outcomes ready

# 2. Your journey to becoming outcomes ready

Where is your organisation at on the journey?

## INTERNAL ALIGNMENT

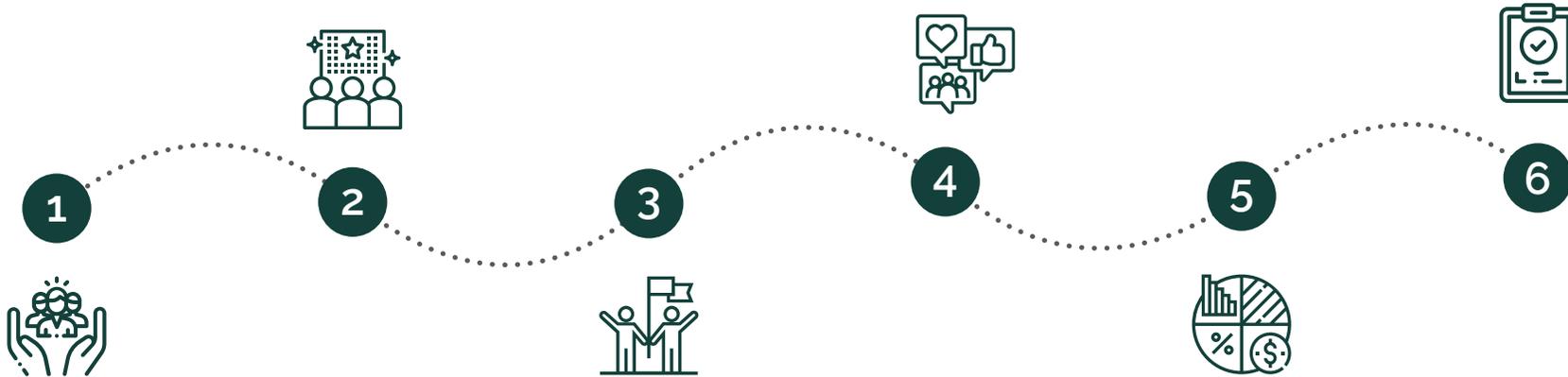
- Staff understand the importance of outcomes measurement
- Staff support is enlisted
- Dedicated resource(s) are earmarked

## SELECT MEASUREMENT PROJECT

- Able to define a measurement project
- Able to identify what outcomes to measure
- A plan in place on how to collect measurement data (when and from who)

## UNLOCK INSIGHTS

- Outcome reports shared with key stakeholders including funders
- Outcome reports used to improve program design
- Outcome reports shared with program beneficiaries



## AWARENESS

- Board is aware of the importance of outcomes measurement
- Management is aware of the importance of outcomes measurement
- Conversations held across the team

## COMMITMENT

- Organisation publicly shares an outcomes / impact measurement narrative (e.g., on website, Annual Reports)
- Capability building (e.g., staff training, engaging a consultant)
- Attend webinars / conferences / workshops about outcomes measurement

## DATA COLLECTION

- Data collection is live
- Staff ownership of the data collection process
- Beneficiary buy-in to provide data

# 3. Assessing your organisation's readiness

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## STAGE 1: AWARENESS

This is the first step of your organisation's journey to starting outcomes measurement.

Is an outcomes-driven culture already embedded within your organisation? Or is there still work to be done to seed that culture?

Having your Board and/or senior management team initiate an outcomes narrative within the organisation is important, but not an essential starting point.

As long as there is a spark of interest within the organisation, this can ignite conversations across teams. You've read this far, so will you be the one who sparks that conversation?

Some of the crucial checklist items to work through at this stage of your journey are:

- Board and Senior Management is aware of the importance of outcomes measurement
- There have been conversations within the team (and across teams) about outcomes measurement



**A great way to engage your team on outcomes measurement is to conduct a quick survey around their perceptions of your organisation's outcomes readiness!**

Some questions you might include in a survey:

- Is our Board aware of the importance of outcomes measurement?
- Is our management team aware of the importance of outcomes measurement?
- As a team, have we had conversations about outcomes measurement?

# 3. Assessing your organisation's readiness

## STAGE 2: INTERNAL ALIGNMENT

After you have sparked interest within your team around outcomes measurement, the next step is to get internal alignment and buy-in.

Getting organisational buy-in is crucial to the success of any outcomes measurement project.

Having the Board or senior management mandate outcomes measurement across the organisation might get things moving at the start. But not having support and enlistment from staff can lead to drawn out and incomplete measurement projects, due to lack of ownership in the process.

Likewise, without the leadership team sponsoring an outcomes-driven culture, staff will soon become fatigued and lose motivation to continue driving the process through the organisation.

Some of the crucial checklist items to work through at this stage of your journey are:

- Staff understand the importance of outcomes measurement
- There is staff buy-in and support to measure outcomes
- We have earmarked a dedicated resource(s) to oversee our measurement projects.

### TIP

#### **Need to engage your Board or CEO on the value of outcomes measurement?**

Why not start by getting them to take a survey on where they think the organisation is on its outcomes journey. Rarely do we take the time to pause and introspect, so reflecting upon the organisation's readiness for outcomes measurement could be an incredibly useful process. We've included a **survey** at the end of this toolkit that can be used for this purpose.

# 3. Assessing your organisation's readiness

Here are some strategies to help you overcome common hurdles in getting organisational buy in for outcomes measurement.

## Convince Frontline Staff

### TACTIC

- Tailor pitch to frontline staff confirming:
  - How this will help to sustain the longevity of the program and services being delivered, by enabling the organisation to provide a strong business case for ongoing funding
  - How this will be an incredibly important trust-building exercise with the beneficiaries by giving them a voice to provide valuable feedback on their progress
  - How this will enable them to see that the hours they are putting in with the beneficiaries are indeed having a real impact and not a waste of time
  - **That this is a simple process that won't add to their workload (through the help of technology and simple tools that are available)**

## Convince Program Managers

### TACTIC

- Tailor pitch to program managers confirming:
  - How this will help to provide much needed proof points required to improve programs and service design
  - How this will enable them to see whether valuable and scant resources are allocated towards areas that are driving maximum impact
  - How this will enable them to extrapolate critical program data to evidence a business case for ongoing funding in the current competitive funding landscape
  - **That this is a simple process that won't add to their workload (through the help of technology and simple tools that are available)**

## Convince Board / Senior Management

### TACTIC

- Request a short meeting with your CEO (or, if you are the CEO, at the next Board Meeting) and present an example of an outcomes report to demonstrate the insights this provides at a program and beneficiary level
- Use the example outcomes report to demonstrate how this can help the organisation secure and retain funding, in addition to boosting credibility of the organisation
- Enlist the support of other program managers and frontline staff to re-affirm the merit of outcomes measurement

# 3. Assessing your organisation's readiness

## STAGE 3: COMMITMENT

Commitment is an action in itself, and simply committing to becoming an outcomes-driven organisation is a massive leap in the right direction.

An organisation's commitment to outcomes measurement can take various forms, depending on where the organisation is at on its readiness journey.

It could be as simple as going public with an outcomes narrative, through the sharing of impactful stories, case studies and committing to being an outcomes-driven organisation on platforms like social media, website, annual reports and internal strategic plans.

Commitment can also be more invested and hands on, such as creating opportunities for staff to attend training, webinars, workshops etc to build capabilities around outcomes measurement.

Showing commitment may even involve engaging a consultant to help define desired outcomes at an organisation-level, which ties in to the organisation's mission; and then drilling down to discrete outcome metrics that is trackable.

Some of the crucial checklist items to work through at this stage of your journey are:

- Organisation shares an outcomes measurement / impact narrative on its website, annual reports, internal strategic plans
- Opportunities have been created for internal capability building
- Support has been enlisted to help the organisation align its mission with org-level outcomes that can be measured over time.



### TIP

#### **Commitment is an action.**

Just by demonstrating that your organisation is committed to becoming outcomes-driven already, sets you apart from other organisations who have not taken steps to get started. This is a positive story in itself to share with key stakeholders including your beneficiaries, staff, individual donors and funders.

# 3. Assessing your organisation's readiness

## STAGE 4: SELECT MEASUREMENT PROJECT

Once your organisation is ready to give it a shot, the next step is for you to select a Measurement Project – a program or initiative that you would like to measure the outcomes of.

For example, your measurement project might be to measure the outcomes of a youth mentoring program that has been running for the last two years.

Once this has been defined, it is time to list down what outcomes you will measure. A good starting point is to jot down the benefits that the program is meant to deliver to its beneficiaries.

To start your thinking, we've provided an example below.

### EXAMPLE:

QUESTION	ANSWER
1. What program will you be measuring?	A mentoring program that provides one-on-one mentoring for at risk youth aged 12 – 18 years.
2. What benefits / outcomes do your program deliver to its beneficiaries?	A role model to build self-esteem A greater sense of purpose A greater understanding of desired training and employment pathway Increased social networks

# 3. Assessing your organisation's readiness

OVER TO YOU:

QUESTION	ANSWER
1. What program will you be measuring?	
2. What benefits / outcomes do your program deliver to its beneficiaries?	

# 3. Assessing your organisation's readiness

Once you have defined a measurement project and the outcomes you'd like to measure, the next step is formulating a plan of how to measure.

Below is an example of what a measurement plan might look like for your youth mentoring project. It is not the intention of this toolkit to cover the steps to create a data collection plan, but you are encouraged to browse our educational resources and toolkits around this topic.

### EXAMPLE:

For our youth mentoring measurement project:

Outcome	How will we measure it?	How frequent will we measure it?
Our beneficiaries report greater self-esteem	Asking our beneficiaries to rate their self-esteem in a survey	During and after the mentoring program
Our beneficiaries have a desired career pathway	Asking our beneficiaries if they have a desired career pathway in a survey	During and after the mentoring program

# 3. Assessing your organisation's readiness

Some of the crucial checklist items to work through at this stage of your journey are:

- A measurement project has been defined
- The key benefits and outcomes of the measurement project have been defined
- A plan is in place on how the outcomes would be measured
  - We have a rough sketch of this plan; or
  - We have developed a plan in-house; or
  - We have engaged a consultant to help us with this plan.



**It can be daunting to develop a measurement plan from a blank canvas. You are not alone.**

Did you know, at least one-third of not-for-profits say not having a measurement plan and key metrics defined is a barrier to them starting outcomes measurement?

This is why we have created a curated library of outcome measurement templates to help organisations get started easily.

[Learn More](#)

# 3. Assessing your organisation's readiness

## STAGE 5: DATA COLLECTION

If your organisation is already conquering this step of its readiness journey, great job for getting this far!

Being at this step means that you have already defined a measurement project, you have a measurement plan in place, and your frontline staff is out collecting the data.

While this step is a key milestone in the readiness journey, it is also one where measurement projects can fail or come to a premature halt. This is due to factors such as:

- Lack of participation from beneficiaries to provide required data
- Significant investment of staff time and effort to collect the data
- Staff becoming fatigued with an arduous data collection process
- Low response rates, leading to lack of staff motivation to see out the process

To make sure that these data collection challenges do not jeopardise your organisation's outcomes journey, it is important to ensure that there is staff ownership and buy-in to support the process, alongside an adequate level of trust from beneficiaries to provide the required data.

A great way to boost response rates is to build trust with the people who are providing data. The following tips may help with this:

### 1. Be transparent about how the data will be used –

for example:

"The data you provide will be anonymous, and will be very helpful in helping us understand how we can improve our program to serve you better"

### 2. Close the feedback loop by sharing your outcome findings with all the beneficiaries who provided data, and highlighting how their inputs are being used within the organisation (e.g., specific areas of program improvement)

Some of the crucial checklist items to work through at this stage of your journey are:

- Data collection is humming along
- There is staff ownership of the data collection, and staff are generally supportive of the process
- There is beneficiary buy-in to provide the data – i.e., beneficiaries trust your organisation enough to provide the data being asked of them

# 3. Assessing your organisation's readiness

## STAGE 6: UNLOCKING INSIGHTS

Having visibility of your outcomes is a fantastic way to gain insights on what is working and what isn't, and how to continuously improve to maximise impact for your beneficiaries.

As you start to see valuable outcomes data coming in, through the effort you've put into the earlier stages, take a pause and reflect upon whether your organisation is putting this data into good use. This is an important step towards embedding a sustainable outcomes-driven culture within your organisation.

There are both internal and external uses of outcome findings:

### Internal uses include:

- Provide direction for staff
- Spotlight program issues and improve program design
- Support the organisation in its planning
- Guide budgets and justify resource allocation
- Suggest benchmarks for future program performance targets

### External uses include:

- Identify other agencies / partners for collaboration
- Enhance the credibility and reputation of the organisation and its program(s)
- Achieve greater support for the organisation's cause
- Retain and increase funding

Some of the crucial checklist items to work through at this stage of your journey are:

- Outcome reports are being shared with all key stakeholders, including funders
- Outcome findings are shared with beneficiaries through closing the feedback loop – i.e., how has the organisation acted on their feedback and inputs
- Program and services are being improved based on the outcome findings

## 4. Are you ready for action?

## 4. Are you ready for action?

Getting your organisation ready for outcomes measurement is already half the battle won. There is no need to feel despondent because your organisation has not started collecting any outcomes data or generated its first outcomes report.

The simple act of demonstrating to key stakeholders, including your funders, that you are committed to the process is tremendously valuable in its own right, and already sets you apart from organisations who are not prepared to take the first steps.

To help you get started, we have designed a simple **Outcomes Readiness Measurement Template** that you can roll out within your organisation. It is simply a short survey (appended to the back of this toolkit) that you can send to your CEO, managers, co-workers to reflect upon. It measures perceptions of where the organisation is at across the six stages we just discussed, and provides great visibility on areas that need further work.

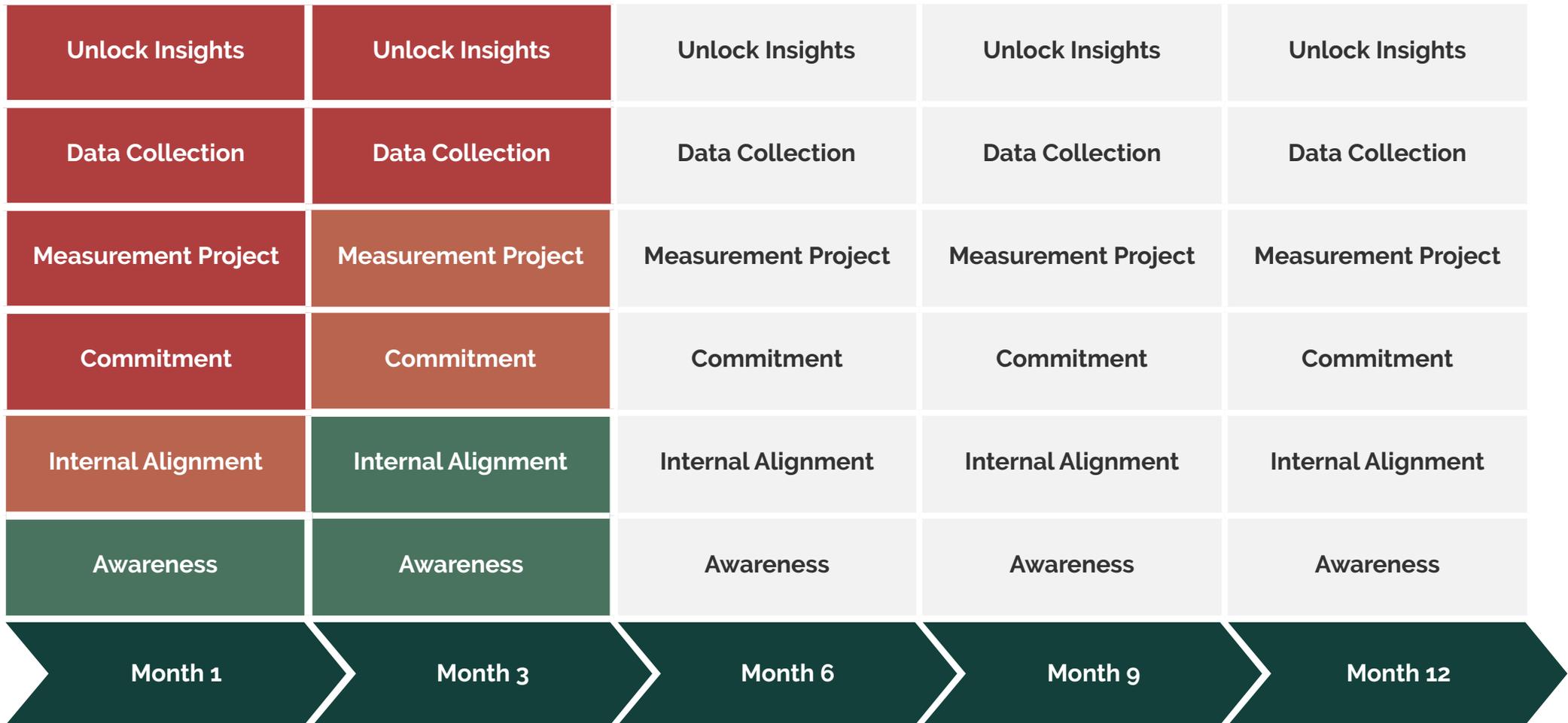
So that the intention to get started does not fall by the wayside, it is recommended that this survey be completed on a regular monthly or quarterly basis.

The **Outcomes Readiness Journey Dashboard** shown below is for an organisation who has been using **Socialsuite** to measure their outcomes journey for the last two months. This organisation has shared the dashboard with their funders to demonstrate action and progress towards becoming outcomes-driven, and in doing so has been successful in building trust and credibility.

**It is not essential that your organisation progresses through the stages in sequential order. For example, you might have already defined a measurement project and have started data collection; but you've identified that more work needs to be done to enlist the support and buy-in from management and frontline staff. This is critical, as it will ensure longevity of your measurement project.**

# 4. Are you ready for action?

## OUR JOURNEY TO BECOMING AN OUTCOMES READY ORGANISATION



# 5. Outcomes Readiness Survey

# 5. Outcomes Readiness Survey

## INSTRUCTIONS:

Below is a list of statements describing what your organisation is doing in relation to outcomes measurement. Rate the extent to which the following statements apply on a scale of 1 to 5, with 1 - Not at all and 5 - A great deal.

		Not at all	Very little	Moderately	To some extent	To a great extent
1.	Our Board is aware of the importance of outcomes measurement.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
2.	Our Management Team is aware of the importance of outcomes measurement.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
3.	As a team, we have had conversations about outcomes measurement.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
4.	Our Staff understand the importance of outcomes measurement.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

# 5. Outcomes Readiness Survey

		Not at all	Very little	Moderately	To some extent	To a great extent
5.	There is buy-in from staff to collect outcomes data from beneficiaries.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
6.	Our organisation has appointment a dedicated team or resource for outcomes measurement	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
7.	Our organisation has publicly shared our commitment to outcomes measurement (e.g., on our website, Annual Reports, etc).	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
8.	Capabilities around outcomes measurement are being built on-e.g., staff training, engaging a consultant, etc.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
9.	My team and/or I have accessed resources in an effort to learn more about outcomes measurement (e.g., downloaded Whitepapers, attended webinars, workshops etc).	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
10.	We know what program(s) we would like to measure the outcomes of.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

# 5. Outcomes Readiness Survey

	Not at all	Very little	Moderately	To some extent	To a great extent
11. We know what outcomes and metrics to use.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
12. We have a plan on how to collect measurement data (e.g. when to collect, and from whom to collect).	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
13. We are currently collecting outcomes data.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
14. Our staff has taken ownership of the data collection process.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
15. Our beneficiaries and stakeholders trust us enough to provide accurate data.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
16. The outcomes of our program(s) are regularly shared with key stakeholders including our funders, Board, etc.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

# 5. Outcomes Readiness Survey

	Not at all	Very little	Moderately	To some extent	To a great extent
17. The outcomes of our program(s) are used to improve program design.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
18. The outcomes of our program(s) are regularly shared withour beneficiaries	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

## TIP

To make it even easier for you to get started, why not use Socialsuite for free to send an electronic version of the outcomes readiness survey (appended to the back of this toolkit) via email to yourself and/or CEO and co-workers.

The survey would be sent automatically to nominated personnel on a monthly basis over a six-month period. You will get a dashboard similar to the example above.

[Click here to get started](#)

## RATHER AUTOMATE AND TRACK PROGRESS ON A REGULAR BASIS?

To automate the scoring process, which is especially useful if you plan to track progress monthly, simply use Socialsuite to send an electronic version of the survey via email to your nominated personnel, on a monthly basis over a six-month period.

The end product, is a dashboard showcasing your progress, which you can use as a catalyst for action.

[Click here to get started](#)

## 5. Outcomes Readiness Survey

### TO SCORE:

Sum scores for all 18 items. Give "Not at all" 0 points, "Very little" 1 point, "Moderately" 2 points, "To some extent" 3 points, "To a great extent" 4 points. Higher score indicates higher organisational readiness.

To obtain individual scores for each of the six readiness stages, simply sum the scores for each of the following question groupings:

- **Awareness:** Questions 1 – 3
- **Internal Alignment:** Questions 4 – 5
- **Commitment:** Questions 6 – 8
- **Measurement Project:** Questions 9 – 11
- **Data Collection:** Questions 12 – 14
- **Unlock Insights:** Questions 15 – 17

### IF YOUR SCORE IS:

#### 0 – 18: You're in the Awareness Phase

And you're not alone. A third of organizations have little or no experience with outcomes measurement – and many find it challenging to get started.

Your organization may not have established processes or tools, the resources or experience needed, or there's a lack of buy-in from staff. Whatever your barriers may be to measuring outcomes, there are small and simple things you can do to get started.

One of these is to build awareness and enlisting the support of your team, your leadership and Board. Another small but incredibly effective step is to continue tracking your organisation's progress. Take the readiness survey on a regular monthly or quarterly basis. After all, you can only improve what you measure.

## 5. Outcomes Readiness Survey

### 19 – 54: You're in the Discovery Phase

You, like most organizations, are aware of the importance of becoming an outcomes-driven organization and is likely to have initiated the right conversations with your team. But with varying funder requirements and unreliable data from beneficiaries, implementing a rigorous and sustainable process can feel very challenging.

But there are some simple steps you can take to create a robust process and make outcomes measurement an integral part of your organization. From building trust with your beneficiaries to improve survey response rates, to streamlining and automating the data collection process.

### 56 – 72: You're in the Refinement Phase

Well done! You're part of a small group of organizations that already have a measurement program. You measure outcomes because you know it can help you improve your programs and increase your impact on your beneficiaries. You may also use it to help with funding requirements.

Unlocking insights from your data is an important step towards becoming a sustainable outcomes-driven organization. As your valuable outcomes data grows, make sure your organization is putting it to good use.

It's also important to continue building your team's confidence and ownership in the outcomes measurement process. A lack of support or buy-in can really jeopardise the longevity of your outcomes measurement, and impact on your achievements so far.

# Socialsuite

SAY HELLO!

## Need more information?



EMAIL

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



WEBSITE

[www.socialsuitehq.com](http://www.socialsuitehq.com)