

VALUING SOCIAL OUTCOMES (VSO) TOOL

USER GUIDE



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About the Valuing Social Outcomes (VSO) Tool

South Australian local government stakeholders identified the need for an approach to measuring the impact of program delivery that doesn't require high levels of resourcing or specialised skill. The aim was to complement existing program evaluation methodologies by also measuring the impact of a program on its participants in terms of social value created and expressing this in dollar terms. While recognising that more advanced approaches such as Cost Benefit Analysis (CBA) and Social Return on Investment (SROI) are often preferred by higher-level decision-makers (due to methodological detail, precision and rigour), these are likely to be too complex for application by officers in local government without a significant level of support and resourcing.

The Valuing Social Outcomes (VSO) Tool (the Tool) has been designed to operate as a social value calculator to fill this identified niche. It assists users through a series of steps to achieve a basic social value calculation for an instance of delivering a community development / community services program with participants over a period of time.

The outcomes available for selection in the Tool are based on subjective personal wellbeing. The Tool provides a menu that allows for selection of up to three of these outcomes that align with what your program seeks to achieve with its participants. The Tool will then provide the questions you need for a program commencement and completion survey, to measure participant achievement of your selected outcomes against set criteria. Entering the survey response data will trigger the Tool to measure participant movement towards your selected outcomes, as a result of your program. Based on participant ranking of personal outcome benefit, the Tool will calculate the resulting social value for one outcome per participant and provide a program total. Once the Tool has been used it becomes a confidential record of participant data and outcome assessment. Its calculation of the social value created by delivering your program can be used to support program reporting and continuous improvement. A handout is provided to explain your use of the Tool to program participants.

The Tool is underpinned by the <u>VSO Common Outcomes Framework</u> (the Framework), developed via sector engagement during the research stage of the VSO project. The Framework covers the key outcomes identified as being important to community development / community services work with individuals and communities. The Tool incorporates outcomes from the Framework for which monetary values are publicly available (in the UK, converted to Australian dollars with the assistance of a contracted economist). Some outcomes in the Framework are not included in the Tool due to them not currently having a publicly available monetary value. The Framework is a useful place to start, to see the outcomes available in the Tool before diving in deeper.

The use of monetary terms to quantify social outcomes is intended as a useful extension to expressing social outcomes in more human terms, such as narratives and testimonials based on personal experiences of participating in community development / community services programs. It is recognised that reporting outcomes in dollar terms only is not desirable and should be done as part of a holistic expression of impact.

The Tool was developed by Flinders University – Australian Industrial Transformation Institute (AITI) for the <u>Local Government Professionals Australia</u>, <u>SA Community Managers Network</u>, part-funded by a grant from the Local Government Association of South Australia (LGA SA) through their Research and Development Scheme. Content of the Tool borrows from validated research and practice undertaken in the UK (sourced from the <u>Greater Manchester Cost Benefit Analysis Tool</u>, <u>Housing Association's Charitable Trust (HACT) Social Value Bank</u> and the <u>Global Values Exchange</u>.

The VSO project acknowledges the <u>Principles of Social Value</u>, published by Social Value International. These principles underpin the various elements of the Tool and have informed this User Guide. Program evaluation is not new to the local government sector in South Australia (and beyond), however impact measurement and the expression of impact in dollar terms (social value) is a much newer development. For this reason, the VSO project is mindful of the need to develop these practices in ways that provide decision-makers, funders, practitioners and communities confidence in the process and results. Consistency in the way the Tool is applied is therefore important in maintaining the credibility and validity of its social value calculations. While some limitations of the Tool and strict guidance regarding its use may seem restrictive, social value measurement is an emerging and important field of work and the Tool has been developed in a way that is cognisant of this.

The following VSO project outputs can be downloaded from the LGA SA website:

VSO Research Report

Research report by Flinders University – Australian Industrial Transformation Institute (AITI) covering a broad range of best practice social value measurement considerations, considering local government context.

VSO Common Outcomes Framework

A framework expressing the shared aims of Community Development / Community Services work, based on sector engagement results as the basis for enabling achievable and affordable social value measurement in the SA local government sector.

VSO Tool

A custom-built Microsoft Excel workbook for use by council staff, based on the Common Outcomes Framework.

• VSO User Guide

This step-by-step guidance document supporting use of the Tool by council staff.

• VSO Participant Pamphlet

An easy-to-read handout for participants in programs in which the Tool is being used.

This User Guide will assist you to decide if the Tool is right for you, prepare you for use of the Tool and provide step-by-step instructions for using the Tool.

Please ensure you thoroughly read this Guide, including the <u>Frequently Asked Questions</u> at the end of the document, prior to using the Tool.

Is the Tool right for you?

It is important to clarify expectations around what level of evaluation and measurement are needed for different purposes, what is feasible to do internally within your organisation and what may need to be outsourced. Local government practitioners wanting to undertake a social vale measurement will need to understand how their funders and decision-makers assess social value and what information and evidence is therefore needed to demonstrate impact.

The table below will help you to consider some of these issues and whether the Tool is likely to meet your needs, or whether you may need to aim for a more bespoke assessment of social value.

Program evaluation needs	VSO Tool	Bespoke SROI or Social CBA
We want to measure the social value of delivering a relatively straightforward program with the same participants involved from commencement to completion	Yes	Yes
Our program is based on a strong Program Logic and has definable outcomes that align well with outcomes available in the Tool	Yes	Yes
We think it would be useful to supplement our quantitative and qualitative evaluation findings with a monetary valuation of social outcomes achieved	Yes	Yes
We don't have the funds to pay a consultant to apply a SVM methodology for us	Yes	No
We need to demonstrate social value to external funders/bodies with high-level evidence/rigour requirements	Possibly	Yes
We are running a program that is not reasonably expected to result in changes to personal and social wellbeing per outcomes available in the Tool	No	Possibly
We won't have the capacity to undertake a participant survey at the commencement and completion of the program	No	Possibly
We need to evaluate the achievement of social outcomes not included in the Tool	No	Yes
We want to measure the social value of a complex program involving multi-layered activities and outcomes	No	Yes
We want to forecast the anticipated social value of delivering a program	No	Possibly
We have already delivered a program and want to look at its social value retrospectively	No	Possibly
We don't believe it is necessary/appropriate to express the social value of delivering our program in monetary terms	No	No

Before using the Tool

Measuring social value using the Tool requires a foundation of clear project planning. For use of the Tool to be valid, a Program Logic must first be established for your program, based on a solid 'theory of change'. This includes determining the outcomes sought by delivering the program and what project activities are expected to achieve them. Based on this, it is then possible to assess if there are outcomes available for selection in the Tool that have an authentic fit with what your program seeks to achieve with participants.

See the <u>VSO Common Outcome Framework</u> for the outcomes available in the Tool and information in the Guide on developing a <u>theory of change</u>.

Overview of Tool structure and process

- Social outcomes available for selection in the Tool have been organised based on the VSO Framework, per:
 - 1 overarching shared goal Community Strength and Vitality
 - 4 Domains broad social development interest areas
 - 13 Headline areas key outcome categories
 - 39 Outcomes specific measurable social outcomes available for measuring against in the Tool.

Please note that a number of the outcomes present in the Framework are not included in the Tool, due to these not currently having publicly available monetary values.

- Outcomes in the Tool are selected at the planning stage of a program by ensuring authentic alignment between them and your theory of change. See information in this Guide on ensuring outcome alignment.
- Participant achievement of the outcomes you have selected is tested via a survey at program
 commencement and completion. Survey responses provide evidence of personal 'distance travelled'
 against the selected outcomes and will determine whether or not a participant has achieved an outcome
 for the purpose of the social value measurement. This will be assessed by the Tool.
- To avoid the risk of over-claiming, a social value will be calculated against a maximum of one outcome only
 per individual participant. If you select more than one outcome to measure the impact of any given
 program, participants are asked to rank the outcomes in the program completion survey, per the level of
 relative benefit they feel they have received from them.
- The tool then ascribes a validated dollar value to the top-ranked outcome achieved by each participant, resulting in a total social value calculation for the instance of delivering your program.

Social Value Measurement rigour

To maintain the credibility of its social value measurements, there is rigour built into the Tool. This rigour includes the following design elements, which align with the Principles of Social Value, including not over-claiming social value, and have been borrowed from related fields of work such as Social Return on Investment.

- A maximum of three outcomes can be selected in the Tool to measure an instance of delivering a program.
- A pre-and-post (program commencement and completion) survey with set questions relevant to the
 outcomes you select is provided by the Tool to determine the number of participants that have achieved
 the selected outcomes. The questions must be used exactly as they appear in the Tool.
- Outcomes based on more complex notions of personal subjective wellbeing use multiple survey questions. These outcomes must not be used in conjunction with other outcomes in the same Headline category.
- Assessment by the Tool of participant achievement against the selected outcomes will result in a maximum of one outcome per participant being included in the final social value calculation.
- The social value calculation is automatically adjusted for:
 - deadweight (a standard value reduction to account for the extent to which the outcomes could/would have happened without the program intervention)
 - o confidence (a standard value reduction to account for the extent to which it can be claimed that the full intent of the outcome criteria has been met).

Ensuring alignment between program aims and the outcomes available in the Tool

Measuring social value is an extension of a well-considered and thorough program evaluation. When planning your program, you will need to develop a theory of change that identifies the problem being addressed and scopes the activities and mechanisms that are required to achieve the desired outcomes and impact. A theory of change model typically guides program planning and data collection across the spectrum of: inputs -> activities -> outputs -> outcomes -> impacts.

It is critically important that any use of the Tool is done as part of a comprehensive program planning and evaluation approach, founded on this theory of change and solid program logic.

Your program logic will define the problem your program seeks to address, provide the basis for your planned activities and state the intended outcomes you hope participants will achieve. To use the Tool, these project outcomes must align with up to three of the outcomes available for selection in the Tool.

Once you have developed a theory of change and program logic for the program, the <u>Using the Tool</u> section of this Guide will help you to assess if there are outcomes available in the Tool that align with what delivering the program aims to achieve. You can also check this via the <u>VSO Common Outcomes Framework</u>.

To ensure that any social value measurement results generated by the Tool are robust and reliable, you need to have confidence that your project activities are directly related to the social outcomes selected for measurement. If the connection between your project and an outcome is vague or ill-defined (i.e. lacks a strong rationale and/or evidence base), then it is strongly recommended that you do not select that outcome in the Tool.

It may also be helpful to check what survey questions will need to be asked of participants in order to use various outcomes in the Tool. Checking these can help to ensure the data you would need to collect via the participant surveys is suitable to your needs. Survey questions must be used exactly as they appear in the Tool.

You may wish to assess a more diverse range of outcomes in evaluating and measuring the impact of delivering your program. The Tool should be used as an element of this broader work, recognising that only outcomes with a publicly available, validated monetary value have been included in the Tool. The Framework includes some further outcomes for which monetary values are not currently available. You may wish to consider these and any other factors necessary for your program evaluation. The participant commencement and completion surveys provided for in the Tool can be used in tandem with any other evaluation questions/processes your broader program evaluation and impact measurement requires.

Theory of Change

A few notes on theory of change/program logic in the context of the Tool.

- Develop a problem statement. It's important to understand and clearly articulate the problem that your
 program seeks to address and why. Data, research, participant/stakeholder feedback, and anecdotal
 evidence can help inform your understanding, definition and framing of the problem.
- 2. Consider and identify the program target group, including demographics (e.g. age, gender, socio-economic/cultural background etc).
- 3. Logically consider how the program will enable participants to achieve the desired outcomes. What inputs (e.g. resources, staffing commitments, infrastructure costs etc), activities or interventions are needed and are these possible to deliver?
- 4. Distinguish between program outputs (what's delivered e.g number of sessions, number of people engaged etc) and program outcomes (impact/benefit/change as a result of the intervention).
- 5. Be realistic about your anticipated outcomes (what you hope to achieve) and the timeframe needed for you to gauge success. It might be helpful to think in terms of short, medium and long-term outcomes. For example, if the long-term desired outcome is employment, then the medium-term could be volunteer or work experience and short-term improved employment skills. Consider when you will be able to test for

- the achievement of the outcome (the Tool requires data from participant surveys at program commencement and completion).
- 6. Consider your assumptions, that is, unexamined beliefs about why or how your program will work. For example, this might be assumptions relating to the target group, timeframes, activities or budget. It is important that you keep a note of these to maintain a transparent record of your rationale and method.
- 7. Consider external factors that are outside of your control but will impact the program and achievement of the desired outcomes. This will also help to frame/explain your processes and achievements.



Typical framework for a theory of change model compiled from various sources

Downloading and saving the Tool locally

To use the Tool (MS Excel file) you will need to save it to a drive local to you. The file name you use when you save it should include the program name you are using the Tool to measure and the date of program delivery. This will then become your record of the social value measurement calculations for that instance of delivering your program (particularly relevant for programs that run more than once).

If you wish to use it again on a future occasion, download and save the Tool again from the original source and name it with the program name and date relevant to your new use of it. This will ensure:

- you are using the latest version of the Tool, in case any updates have been made
- the Tool is empty and ready for use on a new instance of program delivery, each time you need it
- you can return to your previous uses of the Tool (where you saved them locally) as records of the social
 value measurement and calculations on those occasions, including program details, participant response
 data and the total value created.

Please note that once your downloaded Tool Excel file contains participant survey response data, it is a confidential record and must not be shared beyond your program administrative boundaries. See the section of this Guide on <u>analysing the social value calculation result</u> for ways to report the social value created by your program without revealing participant information.

Using the Tool

This section of the Guide provides step-by-step instructions for how to apply the Tool in measuring the social value created by delivering a community development / community services program.

The first three sheets in the Tool, require no data entry. They contain fundamental information about:

- 1. the tool itself
- 2. social value
- 3. an overview of how to use the Tool, which largely points to this User Guide.

Basic program information is entered on the *Describe your program* sheet for reporting and accountability purposes and to ensure there is relevant data to differentiate one instance of program delivery from another (e.g. a program run four times a year, for which you may wish to use the Tool each time).

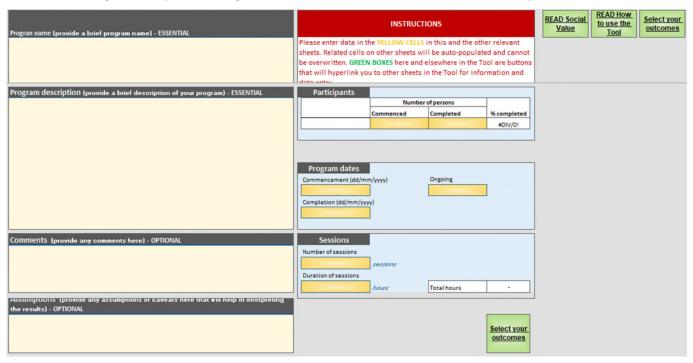
In addition to this, the file name you use when saving the Tool MS Excel file should include the program name and the delivery dates that relate to this occasion of measuring social value (e.g. VSO_The_Awesomeness_Program_Term_One_2055).

1. Describe your program

Click on the **Describe your program** tab at the bottom of the Tool.

Please note:

- Fields containing **red text** provide instructions about what to do and what not to regarding data entry.
- Yellow and pink (salmon) cells indicate where you are required to enter data/information. Other cells will
 auto-populate based on data you enter throughout the Tool you will not be able to overwrite
 information in these automatic cells.
- **Green buttons** help you to navigate your way through the Tool (by hyperlinking to various sheets or other sections of the same sheet). Please note it is not imperative to use the green buttons for navigation you can navigate to any sheet using the tabs at the bottom of the screen instead, if you choose.

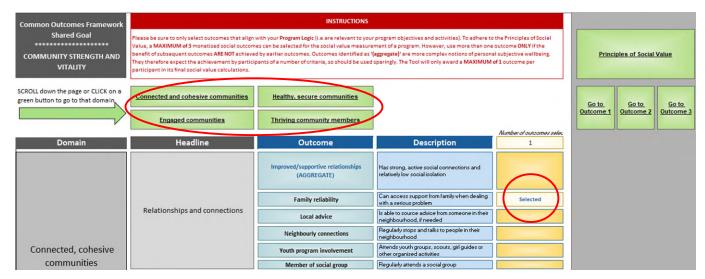


Enter all relevant information and data into the **Describe your program** sheet. This includes the number of participants commencing the program. At the end of delivering your program, you will need to come back to this sheet to enter the number of participants that completed the program. These figures are important in the social value calculations made by the Tool.

Click on either of the green **Select your outcomes** buttons to access that sheet. You can also access the **Select your outcomes** sheet by clicking on its tab at the bottom of the screen.

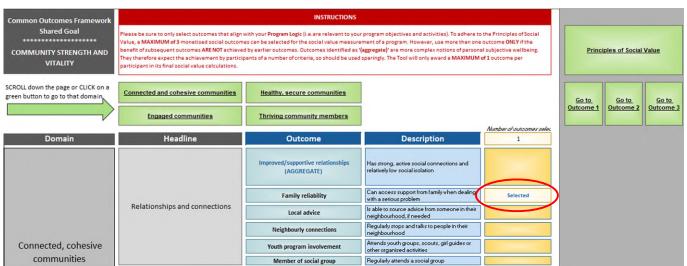
2. Select your outcomes

Click on one of the four green Domain buttons at the top of the sheet to navigate to outcomes available under each Domain (or scroll down manually if you prefer).



From here you will see which Headline categories are within each Domain and the associated outcomes available for selection, per alignment with what your program seeks to achieve. The outcome description column provides a more detailed explanation of the change sought for a participant as a result of being involved in your program. This describes the participant personal wellbeing improvement required for social value to be created against the outcome (i.e. for the monetary value associated with the full or partial achievement of that outcome by an individual to be included in your social value calculation).

Click on the yellow box next to the outcomes you wish to use, hover over the drop-down menu and click 'Selected'. If you wish to deselect the outcome, click on the blank space on the drop-down menu (beneath 'Selected').

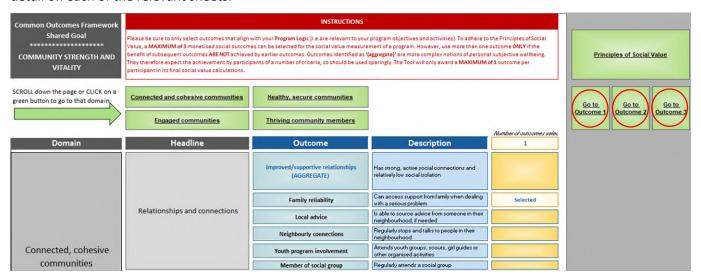


Please note, to align with the Principles of Social Value (not over-claiming social value):

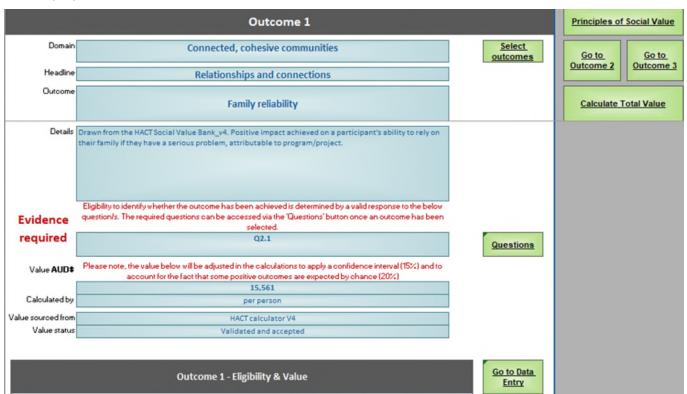
- a <u>maximum of three</u> of the 39 social outcomes in the VSO Tool are permitted for selection in any one use of the Tool
- multiple outcomes (i.e. a total of 2 or 3) <u>should only be selected</u> if the benefits of subsequent outcomes are not achieved by earlier outcomes
- outcomes identified as '(AGGREGATE)' are more complex notions of personal subjective wellbeing. They therefore expect the achievement by participants of a number of criteria, so should be used sparingly.

Selecting outcomes via the process described on the previous page will trigger automatic population of the previously empty *Outcome 1, Outcome 2, Outcome 3, Calculate total value and YOUR SURVEY QUESTIONS* sheets with information relevant to the outcomes you have selected. This automatic information supports your further use of those outcomes in the social value measurement. Deselecting outcomes will clear the automatic information from these sheets.

Please note, selecting multiple outcomes will possibly change the order in which your selected outcomes appear on the *Outcome 1, Outcome 2, Outcome 3* sheets. This is not a problem, but it is important to note the outcome detail on each of the relevant sheets.



Click on the *Outcome 1, Outcome 2 and Outcome 3* sheets (depending on how many outcomes you have selected of the allowable three maximum). These sheets are populated with details about your selected outcomes and information about the data that will need to be entered into the Tool as evidence of participants achieving them (for the purpose of the social value calculation).



Click on the green **Questions** button to access the **YOUR SURVEY QUESTIONS** sheet and check the questions that will need to be included in your surveys in order to use the outcome/s you have selected.

It is important to confirm that you are comfortable with asking participants the required questions (i.e. the questions associated with the outcome/s you have selected). These questions must be used exactly as they appear in the Tool.

<u>For reference only</u>, a full list of the survey questions included in the Tool can be found on the **ALL SURVEY QUESTIONS** sheet. There is no one use of the Tool that will cover more of these questions than are associated with (up to) three outcomes, but it may be useful to browse through the full list for the purpose of selecting suitable outcomes.

Finalise your outcome selection(s).

From this point forward, the *Outcome 1, Outcome 2, Outcome 3* sheets (depending on how many outcomes you have selected), become a central focus, from which you can navigate to the other parts of the Tool that you will need to use to measure against your selected outcomes.

On each active *Outcome (1, 2, 3)* sheet, you will be able to:

- use the green Questions button to view the survey questions that relate to the outcome
- use the green Go to Data Entry button to shortcut straight to the corresponding data entry sheet (Q.1–Q.21) where survey responses must be entered
- access other useful shortcuts via the remaining green buttons.

3. Give program participants the provided handout explaining the social value measurement

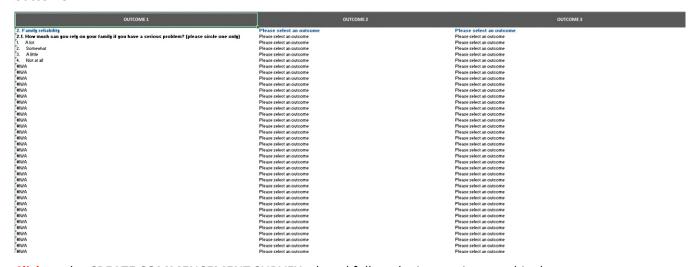
Download and distribute the participant handout from the <u>LGA SA website</u>. This is to be provided to program participants to explain the social value measurement you are undertaking. It explains the purpose and that they will be asked to complete brief surveys at program commencement and completion.

The file name of the handout is **VSO Participant pamphlet** and it is provided in a PDF format. Providing this to participants is an important part of adhering to the transparency required by the Principles of Social Value.

4. Begin delivery of the program, use the Commencement Survey and enter response data

Use of the Tool requires collection of data from participants via surveys at program commencement and completion. The surveys are populated with questions from the Tool that are relevant to the outcomes you have selected. Once you have selected your outcomes, the **YOUR SURVEY QUESTIONS** sheet will show which questions will need to be included in your surveys. The questions must be used verbatim to maintain validity of the resulting social value calculation.

Click on the **YOUR SURVEY QUESTIONS** sheet and **right click** to copy the questions that relate to each selected outcome.



Click on the **CREATE COMMENCEMENT SURVEY** tab and follow the instructions on this sheet to paste your questions into your survey. **Click** back on the **YOUR SURVEY QUESTIONS** sheet to bring each of the questions from that sheet over into your survey.

Instructions for setting up your survey:

- Fill in the survey title, month/year, project description.
- Make sure you amend/delete non-required information/lines (where indicated).
- Copy and paste questions relevant to your selected outcomes into this survey template, where indicated [see copy and paste instructions below]
- When finalising the survey, make sure that individual questions are not split over two pages (use the print preview function to check this after deleting the user instruction rows). Add extra rows to prevent this from happening, if needed.

[Program title] commencement survey

Month and year

Brief description of the project/program

About this survey

This survey is part of the [program title] program evaluation, at the commencement and completion of the program. Per the handout you received, the purpose of the survey is to understand your thoughts on any benefits (positive change) from being involved in the program.

Please note that we will only use your personal details to match your commencement survey with your completion survey. Your personal details will not be recorded with your survey responses (we will use a unique identifier instead). Each question in this survey is important to understanding your experience of the program. Please answer as completely and honestly as you can. Your responses are confidential.

Date: First and last name: Please circle the response number that applies to you: Copy relevant questions from SURVEY QUESTIONS sheet and paste in the row 10 Ch 10 1 below. Make sure you include the outcome heading (blue text) to help respondents understand the relevance of the questions. To paste the questions: · right click your mouse click the arrow next to PASTE SPECIAL · go to the PASTE VALUES group select VALUES & SOURCE FORMATTING [See picture] REMOVE the term (AGGREGATE) where this is included in question Paste Special... headings · Leave the question numbers as pasted in to simplify data entry/recording of results (the question numbers will help you to know where to enter what data) DELETE THIS INSTRUCTION ROW AND PICTURE GUIDE WHEN YOU HAVE FINISHED PASTING IN YOUR QUESTIONS

The instructions guide you to create a survey that is printable directly from the Tool. This can be combined with any other questions your program evaluation may require are asked of participants at program commencement. You may also wish to request further demographic information if you have not already achieved this through your

standard program delivery approach. This would support use of the optional *Describe you participants* sheet (see step 6).

Print and undertake the Commencement Survey with program participants as part of an early session in the program (either in the first session or as close to the first session as possible, noting the need to establish comfort, rapport and trust if you are working with new participants).

Once you have Commencement Surveys completed by program participants, you will need to enter their response data into the corresponding data entry (**Q.1–Q.21**) sheets.

If you have selected just one outcome for measuring the social value of delivering your program, then you will need to enter response data into just that one corresponding sheet. If you have selected two or three outcomes, your data entry may be across up to three data entry sheets. The survey question numbers determine which data entry sheet is to be used. In any one use of the Tool, the maximum number of data entry (*Q.1–Q.21*) sheets in use will be three, corresponding with the maximum selection of three outcomes for measurement.

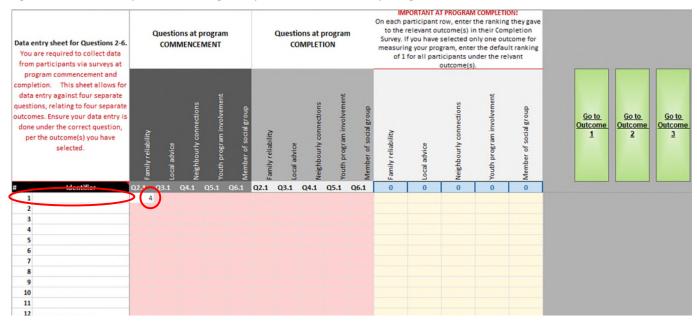
From each active *Outcome 1, Outcome 2, Outcome 3* sheet, click on the green *Go to Data Entry* button to shortcut straight to the related data entry sheet.

			Outcome 1			Principles Yai	
Domain		Connected,	cohesive communities		Select outcomes	Go to Outcome 2	Go to
Headline	Relationships and connections						Outcome 3
Outcome		Farr	nily reliability			Calculate 1	Total Yalue
Details			f. Positive impact achieved on a p elem, attributable to program/proje				
Evidence			ocen achieved is determined by a valid of the 'Questions' button once an ou				
required			Q2.1		Questions		
Value AUD\$			calculations to apply a confidence inte e outcomes are expected by chance (2				
			15,561				
Calculated by	per person						
Value sourced from	HACT calculator V4						
Value status	Validated and accepted						
		Outcome 1 - Eli	gibility & Value		Go to Data Entry		
	Number of persons						
		Completed project	Eligible for outcome	2 completed			
	Total		1	#DIV/0!			

For each participant with a completed Commencement Survey, **enter** a unique identifier for them in the **Identifier** column. This protects the confidentiality of participant response data stored in the Tool and was a requirement of the developer. Separate to the Tool, you will need to keep a list of your participant names and the unique identifiers or row numbers you have allocated to each individual in the Tool. This allocation of individuals to rows on the active data entry (**Q1–Q21**) sheets is very important so the Tool can match participant data across sheets where required (in cases where more than one outcome has been selected and more than one data entry sheet is being used). If you have selected more than one outcome, this same participant name order **must** be used on the other relevant data entry **(Q.1–Q.21**) sheets.

Enter each participant's response to the survey question in the corresponding COMMENCEMENT box (pink) on the row you have allocated to them in your separate record.

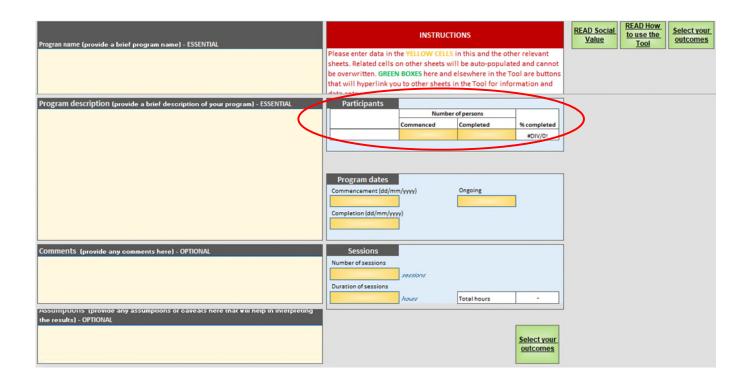
Note that if you have selected the outcomes that relate to data entry sheets *Q.1, Q.7, Q.19* or *Q.20* each of these sheets provide for entry of participant response data to a grouping of questions that are used together. These sheets correspond to the four complex (aggregate) outcomes in the Framework and are therefore measured using a number of survey questions. If you have selected outcomes that relate to any of the other data entry sheets, these sheets provide for the entry of participant response data for separate questions which you may or may not be using in tandem, depending on your selected outcome(s). Be sure to enter survey response data against the correct questions, using the question numbers as your guide.



Repeat this data entry for all of your survey questions (i.e. all the questions you used in your Commencement Survey, for your (up-to-three) selected outcomes). Be sure to access the correct survey data entry sheet (Q.1–Q.21) by using the green **Go to Data Entry button** on your active **Outcome 1**, 2, 3 sheets.

As mentioned above, it is critically important that the row you allocate to each participant is the same row you use for that participant on any other active survey data entry sheets (i.e. participant #1 on one data entry sheet must be the same individual as participant #1 on any subsequent data entry sheet, and so on down your list of participants). This is because the Tool matches up rows between sheets to make its calculations for each individual.

Click on the *Describe your program* tab and ensure the number of participants you have recorded as commencing the program matches the number of Commencement Survey responses you have entered into the Tool. If the number does not match (e.g. not everyone agrees to, or is available to, complete a survey) make a note of this in the comments box.



5. Finalise delivery of the program, use the Completion Survey and enter response data

At the conclusion of delivering your program the same survey questions used in the Commencement Survey are once again used with participants in the Completion Survey. Survey responses determine the achievement of the selected social outcome(s) for the purpose of the social value measurement.

Copy and paste your questions from the **CREATE COMMENCEMENT SURVEY** sheet into the **CREATE COMPLETION SURVEY** sheet.

The Completion Survey has an additional question which asks participants to rank the selected outcomes in terms of the greatest level of benefit to them personally. This question comes directly after the regular survey questions.

The instructions on the *CREATE COMPLETION SURVEY* sheet guide you to create a survey that is printable directly from the Tool. This can be combined with any other questions your program evaluation may require are asked of participants at program completion.

Print and undertake the Completion Survey with program participants as part of a late session in the program (either in the last session or as close to the last session as possible).

Once you have Completion Surveys completed by program participants, you will need to enter their response data into the corresponding data entry (**Q.1–Q.21**) sheets, matching your data entry at the Commencement Survey stage.

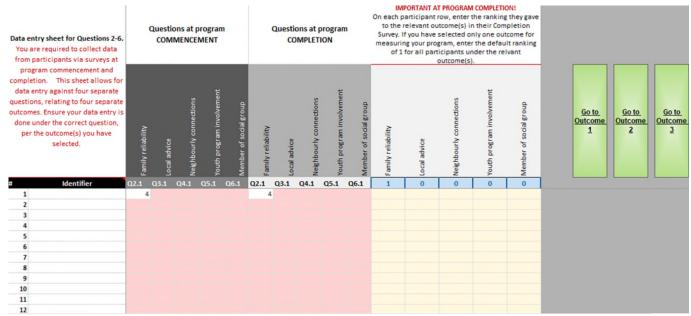
From each active *Outcome 1, Outcome 2, Outcome 3* sheet, click on the green *Go to Data Entry* button to shortcut straight to the related data entry sheet.

Outcome 1					Principles of Social Yalue		
Domain	Connected, cohesive communities Select outcomes					Go to Go to	
Headline		Relationsh	ips and connections			Outcome 2	
Outcome		Fam	ally reliability			Calculate Total Yalue	
Details			i. Positive impact achieved on a p lem, attributable to program/proje				
Evidence			een achieved is determined by a valid d via the 'Questions' button once an ou				
required			Q2.1		Questions		
Value AUD\$	Please note, the value						
Calculated by							
Value sourced from Value status							
Validated and accepted Outcome 1 - Eligibility & Value Number of persons Completed project Eligible for outcome 2 completed EDIV/09							
	I otal	*	1	#DIV/0!			

For each participant who completed a Completion Survey, use your separate record of participant row numbers (*Identifier* column) to **enter their response** to the Completion Survey question in the corresponding COMPLETION box (pink/salmon) on their correct row. If you entered Commencement Survey response data for any participants for whom you do not have Completion Survey data (e.g. a participant has not completed the program or was not able to complete a Completion Survey), leave their corresponding COMPLETION boxes blank.

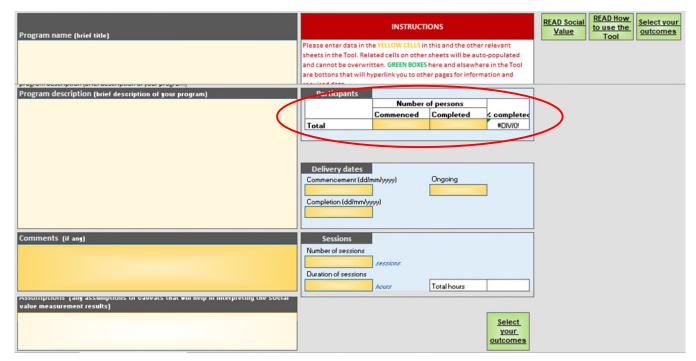
Again, if you have selected more than one outcome and therefore have participant survey responses to enter across multiple sheets, ensure you enter individual's responses on the same row number on each active data entry sheet. This will be done easily by consulting your separate record to check which row number relates to which participant.

If you selected more than one outcome and therefore included the outcome ranking question in your Completion Survey, **enter the outcome rank** provided by the participant in the ranking column. If you selected only one outcome and therefore didn't include the outcome ranking question in your Completion Survey, **enter the default value of '1'** in the ranking column.



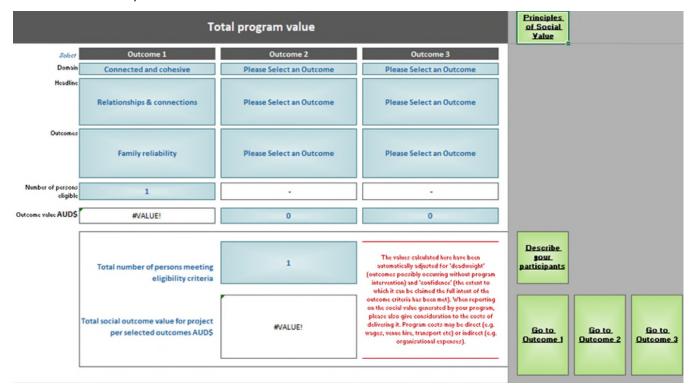
Repeat this data entry for all survey questions.

Click on the **Describe your program** tab and enter the number of participants completing the program. If this number does not match the number of Completion Survey responses you have entered into the Tool, make a note of this in the comments box.



6. Analyse the social value calculation result and provide context

The Tool results are presented on the *Calculate total value* sheet.



Click on the green *Calculate total value* button on any of the active *Outcome 1, 2, 3* sheets (or click on the Calculate total value tab). Once all other required data entry has been completed (number of participants commenced, outcome selection, pre-and-post survey data entry including outcome rankings, number of participants completed) this sheet will display the social value created against each of your selected outcomes and the resulting total value, as dollar figures (in \$AUD).

This is the final calculation of the social value created by this instance of delivering your program, per participant data you entered against the outcomes you selected in the Tool. The total figure takes into account the number of participants partially or fully meeting the set criteria relating to each of your selected outcomes and, therefore, a social value commensurate to this having been created. The total figure is automatically adjusted for deadweight and confidence (see information in the Guide about social value measurement rigour).

It is important to note that the social value figure does not take into account program delivery costs. Any reporting on the social value created by delivering your program should consider the costs of administering it and commentary on this should be included in your reporting narrative. Program costs may be direct (e.g. salaries, venue hire, transport, etc) or indirect (e.g. organisational expenses).

In addition to covering the considerations above in the body of your reporting, please also include the paragraphs on the following page as a footnote, to provide transparency regarding your social value measurement approach.

Please copy and paste these paragraphs into any reporting that includes the social value measurement result from your use of the VSO Tool:

Social value is created when socially-focused policies, programs and activities lead to improvements in the lives of individuals or society as a whole. These improvements are often expressed in terms of individual or community strength and wellbeing measures and connect closely with equity, access, inclusion and social capital indicators. The social value of delivering the [INSERT YOUR PROGRAM NAME] program to participants between [INSERT YOUR PROGRAM DELIVERY DATES] was measured using the Valuing Social Outcomes (VSO) Tool, which facilitates the expression of this in dollar terms without necessitating the sharing of any information about the program participants.

The VSO Tool was developed by Flinders University – Australian Industrial Transformation Institute (AITI) for the Local Government Professionals Australia, SA Community Managers Network, part-funded by a grant from the Local Government Association of South Australia (LGA SA) through their Research and Development Scheme. The Tool borrows on validated research and practice undertaken in the UK (sourced from the Greater Manchester CBA Tool, the HACT Social Value Bank and the Global Values Exchange).

Per the VSO Tool process, surveys were undertaken with participants at program commencement and again at completion using set questions on personal subjective wellbeing that relate to the outcomes the program seeks to achieve, based on its Program Logic. The confidential survey response data enabled social value calculations via application of the VSO Tool. For more information about the VSO Tool please see the LGASA website.

Use of the Tool enables real benefit in the continuous improvement of program design and delivery. The process of measuring social value and understanding distance travelled by participants against the selected outcomes might inform review of your Program Logic/Theory of Change – what the program aims for and the activities undertaken with participants to achieve the desired change.

Per the guidance relating to downloading and saving the VSO tool locally, each time you use it the file will become an important record of delivering the subject program at the specified time (date range) to the subject participants and the social value created by doing so. These records may be useful when looking over time at different social value measurement results from use of the Tool with various participant cohorts in successive delivery instances of a program (i.e. running the same program with different participants). These should be treated as confidential records due to containing participants survey response data and should therefore not be shared outside the boundaries of your program administration.

The **Describe your program** sheet provides a useful place to record the actual activities of the program, number of program session and their duration, etc, which are potentially useful aspects of understanding the impact of the program in various forms (e.g. if you change some of these factors over time).

Consider also using the optional *Describe your participants* sheet. Click on the *Describe your participants* button on the *Calculate total value* sheet and enter the relevant information into the yellow boxes. It is not necessary to answer all questions on this sheet however having more information about your participants may help to better understand and interpret the social value measurement results.

Do I need any training in the use of the VSO Tool?

No.

Measuring social value is a serious endeavour so there are, however, some foundational understandings that will assist in ensuring your use of the Tool results in a valid and credible social value measurement.

The Tool is designed to form part of a comprehensive program evaluation methodology – to take the evaluation further, into ascribing a dollar value to the outcomes achieved by program participants (where there is alignment between the program aims and the outcomes available in the Tool).

A pre-requisite to using the Tool is developing a clear Program Logic / Theory of Change for the program you wish to use the Tool on. This allows for genuine, deliberate and logical alignment between the purposeful activities and resulting intended outcomes of the program, and the outcomes available in the Tool. Measuring the social value of delivering your program to a group of participants requires a clear understanding of what the program is seeking to achieve, what activities/interventions are needed to deliver these outcomes and how these are aligned with validated outcomes available in the Tool.

The Local Government Professionals Australia, SA Community Managers Network is exploring the possibility of the delivery of Program Logic training. This is a valuable approach to enabling good program planning and evaluation in and of itself and is also a useful basis for the successful use of the Tool.

How do I make sure the VSO Tool suits my evaluation needs?

Please see the <u>Is the Tool right for you?</u> section of this Guide. This will assist your decision-making regarding whether the Tool is right for your program circumstances.

Please also see the information in this Guide regarding <u>ensuring alignment between what your program aims to achieve and the outcomes available in the Tool.</u>

The outcomes my program is seeking to achieve with participants are not available in the VSO Tool, can I still use it?

At this stage, no.

There are 39 specific outcomes available in the VSO Tool. This spread of outcomes available for selection in the Tool will allow for alignment with what many programs are seeking to achieve with their participants but will likely not align with some.

Via engagement with practitioners across a range of South Australian councils, a common outcomes framework was developed as part of the VSO Project, to describe the key aims of community development work as they relate to individuals and communities. This framework includes several items of keen interest to the sector for which there are currently no dollar values ascribed. These of course remain very important aspects of what the sector aims for in its community development and social services work, however they are not at this stage included in the Tool, which is focused exclusively on outcomes for which a monetised measurement is currently possible.

The Tool has newly been developed for the South Australian local government sector to gauge interest in measuring social value in dollar terms. The tool may be expanded in the future to include a broader range of outcomes, also dependent on validated work that can be borrowed from to incorporate new outcomes into the

tool (the existing 39 outcomes in the tool have been borrowed from work in the UK where social value measurement is more advanced as a field).

To support evaluation of programs with which there is not a strong alignment with outcomes available in the Tool, you may wish to access the <u>Community Development Evaluation Framework (CDEF)</u>, also developed with the support of a Research and Development Scheme grant from the Local Government Association of South Australia. The CDEF assists with selecting an evaluation methodology that suits your program circumstances considering what you wish to measure and the resources available to do so.

I want to measure the social value of a one-off event. Can I use the VSO Tool to do this?

No.

The Tool is designed to measure the social value created by a program that works with individual participants over a period of time, from commencement to completion with individuals participating in sessions of the program based on a Program Logic / Theory of Change towards the program's desired personal and social wellbeing outcomes.

The social value measurement facilitated by the Tool is based on assessment of 'distance travelled' by participants against set, validated benchmarks to determine participant eligibility for being recorded in the evaluation as achieving the designated outcome (for which a dollar value ascribed).

Based on a clear Program Logic, including how much contact time will be needed with participants to achieve the program's desired outcomes, the Tool allows for social value measurement of program delivery instances which provide reasonable expectation that participants will achieve significant improvements in personal and social wellbeing (per the different criteria associated with each of the 39 outcomes available in the Tool). For the purposes of using the Tool, this is determined to not be achievable from a single interaction with an individual at a one-off event.

Your Program Logic will need to consider evidence about what is needed to effect the intended change. This will assist in determining the amount of contact time/sessions/activities required to reasonably anticipate participants achieving your program's intended outcomes – i.e. if we want to see participants achieve X, we will need to do Y over Z (number of) sessions.

How does the VSO tool obtain data from which to measure the social value of delivering a program?

Directly from program participants via surveys.

Practitioners using the Tool to measure the social value created by an instance of delivering their program use pre-and-post surveys to gather data directly from program participants. This data includes responses to simple survey questions at the commencement and completion of a program. Participants are asked set questions from the Tool about their life and their experience of the program. The questions seek to understand any 'distance travelled' by participants in relation to the outcomes selected in the Tool against which the social value of the program is being measured.

Accompanying the Tool is a one-page handout for program participants, explaining that the social value measurement is being undertaken and advising they will be asked to complete a survey at the start and end of the program to enable this. Practitioners may wish to include other questions in their commencement and completion surveys. Doing so will not impact on the social value measurement.

Why can I only select a maximum of three outcomes for measuring the social value of delivering my program?

The limit to a maximum of three outcomes is part of the rigour built-in to the Tool to ensure adherence with the <u>Principles of Social Value published by Social Value international</u>, which includes not over-claiming results/value.

Other rigour from the field of social value measurement built into the Tool includes:

- limiting selection of multiple outcomes from the same part of the Framework
- limiting reporting on the social value created for any individual participant to just one of the (up to) three
 outcomes selected for measuring the impact of an instance of program delivery
- automatic adjustment of the Tool's social value calculations for confidence (the degree to which it can be claimed the full intent of the outcome has been achieved) and deadweight (the degree to which it can be claimed that achievement of the outcome was due to the program's intervention).

How should I talk about the results from my use of the VSO Tool when I report on my program?

While program evaluation and understanding how individuals and communities benefit from our programs and services is not a new concept, measuring this as social impact and social value is relatively newer, as is expressing this in dollar terms. The costs of program delivery should be considered when reporting on the social value created by delivering a program.

In order to be expressing monetary social value results in a way that gains the confidence of report recipients, funders and other decision-makers, some consistency has been sought in methods for reporting the results of using the Tool. Please refer to the information in this Guide on <u>analysing the social value calculation result and providing context</u>, which includes some paragraphs users are asked to include in their reporting where Tool results are being included.

Who developed the VSO Tool?

The Tool has been developed via a project run by the Local Government Professionals Australia, SA Community Managers Network (CMN) with the support of a Research and Development Scheme grant from the Local Government Association of South Australia (LGA SA).

Research and technical development of the Tool was undertaken by Flinders University – Australian Industrial Transformation Institute (AITI). The CMN thanks AITI for their clever work in researching the field of social value measurement and developing the Tool. The CMN notes that over time, minor amendments may be made to the Tool without ratification by AITI. For transparency, these will be listed on the *Version and acknowledgements* sheet in the Tool as a change register and the version of the Tool available for download on the LGA SA website will be updated.

The LG Professionals SA Community Managers Network wishes to thank LGA SA for their support of the VSO Project via Research and Development Scheme funding and the Cities of Onkaparinga, Salisbury, Port Adelaide Enfield and Charles Sturt for cash contributions to the project budget, as well as their role on the VSO Steering Group, complementing the Networks own contributions.

The Community Managers Network also acknowledges valuable in-kind support via involvement in the VSO Steering Group and other related project activities by its parent body Local Government Professionals Australia, SA, the Rural City of Murray Bridge, City of Tea Tree Gully and the Social Impact Measurement Network of South Australia.

Support

After carefully reading all of the available materials (in this VSO User Guide and the summary instructions in the Tool itself), the VSO Project Leader and some Community Managers Network members are available via phone and email to assist as best they can with any queries you may have.

At the time of writing these FAQs it is not possible to determine what level of demand may be experienced for answering questions on the Tool from the South Australian local government sector (or beyond). Please be mindful of this if responses to your queries are not immediate.

Mike Brown (VSO Project Leader), Social Planner, City of Onkaparinga

(08) 8384 0192

mike.brown@onkaparinga.sa.gov.au

 Carla Leversedge (Community Managers Network Chair), Manager Community Development & Engagement, City of Tea Tree Gully

(08) 8397 7218

carla.leversedge@cttg.sa.gov.au

Bev O'Brien (Community Managers Network Committee Member), Manager Community Development,
 City of Port Adelaide Enfield

(08) 8405 6876

bev.obrien@cityofpae.sa.gov.au

The Community Managers Network aims to develop a community of practice over time, for practitioners to collectively support each other with program evaluation, social value measurement and use of the VSO Tool.