

Social Value Measurement Toolkit

Many businesses face the challenge of how to measure Social Value. This toolkit is designed to support sustainability and corporate social responsibility professionals in addressing it. The toolkit provides guidance, inspiration and practical advice from organisations that have successfully delivered Social Value.

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Measuring Social Value: About this toolkit



ABOUT THIS TOOLKIT

The Social Value challenge

You have set out your vision, planned your strategy, and brought senior management on-board.

From now on, communicating Social Value effectively and successfully demonstrating its contribution to the business are your biggest challenges.

Environmental factors are becoming easier to quantify. But it is widely believed that social factors remain nearly impossible to measure.

One of the main reasons for this comes from how Social Value is understood and represented by different groups of stakeholders. People's understanding of Social Value is inherently linked with the change they expect. This makes it highly subjective. The key question becomes: 'How can I translate the change that I have captured into information others understand and value'?

Few companies have the time and resources to undertake complex data capture and analysis. Instead, defining tight objectives, setting appropriate key performance indicators (KPIs), and using targeted communications are simple, cost-effective steps that improve how Social Value is measured and shared.

The aim of this toolkit is to give guidance on what works (and what doesn't), share do's and don'ts and provide simple and practical advice from organisations that have successfully delivered Social Value.

Informed by hands-on practitioner experience, it features case studies from leading businesses.



ABOUT THIS TOOLKIT

How we produced this toolkit

To ensure it includes insights from Social Value practice as well as theory, Uscreates involved practitioners in developing the toolkit.

We conducted in-depth interviews with sustainability professionals from O2, EY and RBS

We collected case studies from a range of companies, including Belu Water, Aviva, Sainsbury's, Deloitte, Landmarc Services and Catch22

We carried out a detailed review of existing methodologies and tools to assess their comparative benefits and limitations based on different company needs

We distilled Uscreates' thought leadership, experience and successes into a few, easy-to-apply guiding principles



IN THIS SECTION



*Measuring Social Value:
Getting started*



GETTING STARTED

What is Social Value?

For Uscreates, Social Value can be broken down as follows.

‘**Social**’ is all about groups of people, such as communities, organisations, businesses, government or society as a whole. ‘**Value**’ refers to what is of worth or importance to those people. Different people value things in different ways. So when considering Social Value, it is important to think about the value to all the groups of people involved.

SOCIAL =

people communities
society groups
organisations

VALUE =

of worth
of importance
to whom?



GETTING STARTED

Win-Win Social Value

What is valuable to a business may not be valued by its employees or the community in which it operates. We believe that Social Value is created when an organisation can create value for multiple stakeholders through its activity. Uscreates describes this as *Win-Win Social Value*.

[Download the Win-Win Social Value template here](#)





What is the difference between Social Value and Social Impact?

IMPACT =

The difference that is made

(excluding what would have happened anyway)

VALUE =

What the difference is worth



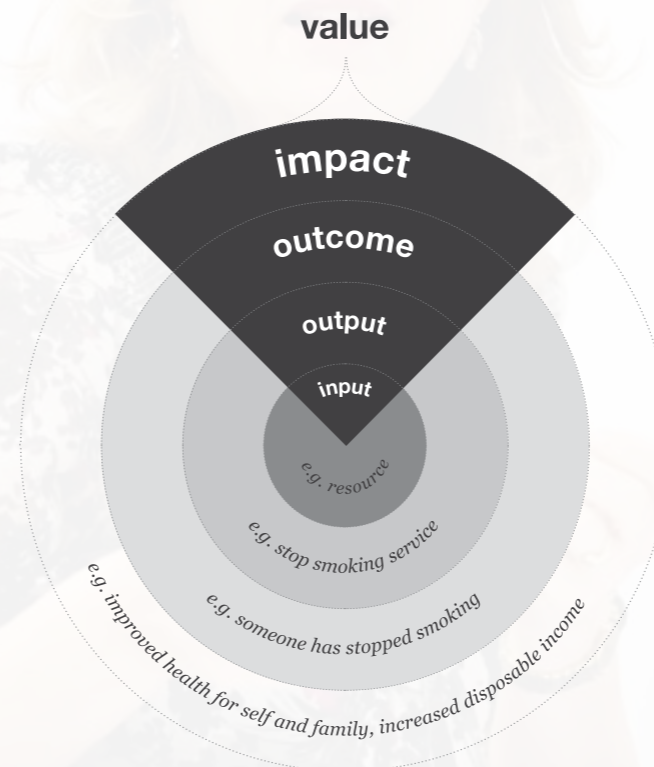
GETTING STARTED

Mapping Social Value - Theories of Change

When planning Social Value measurement, it's important to consider what you need to measure and why. By mapping out the change that you are trying to effect, you can identify where and how you need to collect data.

The diagram on the right shows an example of how Uscreates maps change.

[Download the Social Value Mapping template here](#)



The Impact Diagram

Input:

What resources and activities have you used?

Output:

What are you putting out there? E.g. a new stop smoking service

Outcome:

What has changed as a result of the output? E.g. X people have stopped smoking

Impact:

What is the broader or longer term effect of the outcome? E.g. improved health for those who have stopped smoking, increased disposable income, less cigarette butt litter

Value:

What is the value (economic, social, environmental etc.) of the impact? E.g. cost saving to the NHS



IN THIS SECTION



Measuring Social Value:
How to...



The following 'How to's' provide practical advice for measuring Social Value. They are distilled from interviews with a range of practitioners working in the field.



TOOLS & RESOURCES FOR THIS SECTION

HOW TO...

How to define the right objectives

There are simple steps you can take to ensure your approach to Social Value measurement starts well. First and most important is including a Social Value goal as early in the process as possible. This may sound obvious, but a lot of initiatives still start with 'Output' goals (such as 'We want 1000 young people to come through our programme') rather than 'Value' goals (such as 'We want to increase the employment prospects of young people coming through our programme by 50%').

The importance of starting with a Social Value goal came up in all our interviews and case studies. The most successful initiatives were:

- Able to formulate their own definition of Social Value around a specific area of influence.
[See Landmarc's case study](#)

- Completely clear about their purpose, with often only one SMART Value goal
- Articulated really simply
- Very specific to their business and operational strategy and built on what they were good at.
[See Deloitte's case study](#)

The process of setting a Social Value goal is documented in the Uscreates' Social Value Diagram, as well as the step-by-step Social Value Definition document that you can download and print.

Prioritising your Social Value goal is key.
[Sainsbury's planning model](#) is a good example.

VIDEO

Watch Beth Knight from EY explain why you should be very clear about the business values

TOOL

Social Value Mapping Diagram

TOOL

Social Value Definition Worksheet

CASE STUDY

Read about Sainsbury's approach



TOOLS & RESOURCES FOR THIS SECTION

HOW TO...

How to set the most relevant success factors

Setting the right success factors is the hardest part of the process, but it's also the most important. Being pragmatic is key. You are never going to be able to measure your total Shared Value from day one, or year one. Hardly any company in the UK has a rounded understanding of the Social Value they create, both positive and negative. It is incredibly complex and a work-in-progress for most.

What you can do is:

- Define your success factors in the context of your Social Value goal, not your Social Output goal
- Be very clear about what actually needs measuring and for whom
- Focus on a very simple framework built on operational needs (can this sit in the Finance dashboard, HR dashboard or Supply Chain management dashboard?)

- Keep Success Factors to a minimum at first (two to three at most)
- Explore how data already being collected can be repurposed
- Be consistent and improve incrementally
- Keep abreast of best practice and your peers' activities

There is much to inspire you in our interview with Beth Knight, Head of Sustainability at EY. Beth explains how a simple approach based on five very consistent success factors, built on business needs with small incremental improvements, is delivering measurable results. [See Beth's interview here](#)

The practical example from Aviva also shows you how the approach described above can be translated into practice. [Read the case study here](#)

VIDEO

Watch James Graham from RBS explain why you should link evaluation to your organisation's needs

VIDEO

Watch Beth Knight explain EY's approach

CASE STUDY

Read about Catch22's approach



TOOLS & RESOURCES FOR THIS SECTION

HOW TO...

How to find your way around outputs, outcomes, impact and value

Once you have defined your SMART Social Value goal and identified two or three relevant Success Factors, you are ready to start developing a simple evaluation framework with more specific metrics.

The 'inputs – outputs – outcomes' model is not new. It has been used by benchmarking organisations such as the London Benchmarking Group for several years and is well documented. However, finding practical and realistic ways to stretch measurement further, from Social Outcomes through to Social Value, is becoming increasingly pertinent as it allows understanding of not only outcomes but also the impact that those outcomes make and the value of that impact.

There are several ways of doing this with varying degrees of sophistication. These include complex, resource intensive SROI-driven approaches through to more pragmatic and scalable approaches.

As we said in the 'How to define the right objectives' section, the key is to be very disciplined:

- Always start with your SMART Social Value goal
- Define the impacts you seek based on your goal: type of impact, number of impacts, and audience for impact
- Focus on your outcomes. Ask yourself, 'What outcomes do I need to achieve the impact I seek?'
- Now start considering outputs and inputs

VIDEO

Watch Beth Knight from EY give some pointers for meeting the challenge of measuring impact

VIDEO

Watch Ben Plain from O2 talk through his experience of impact measurement

TOOL

Social Value Mapping Example

TOOL

Social Value Mapping Worksheet





HOW TO...

How to choose the right methodologies

Round up of common Social Value measurement tools and methods							
TOOL	DESCRIPTION	METHODOLOGY	GREAT FOR	NOT SO GOOD FOR	USED BY	INDUSTRIES/SECTORS INC.	ACCESS
Dow Jones Sustainability Index	<p>World's first global sustainability benchmark (1999)</p> <p>Tracks stock performance of leading companies based on economic, environmental and social criteria</p> <p>Serves as benchmark for investors who integrate sustainability considerations into their portfolios</p> <p>'Community and philanthropy' section of the DJSI questionnaire is based on the LBG framework</p>	<p>Industry-specific questionnaire-based index</p> <p>Social value element focused on:</p> <ul style="list-style-type: none">Human capital developmentTalent attraction & retentionOccupational H&SStakeholder engagementSocial reporting <p>Companies receive a Total Sustainability Score between 0 – 100 and are ranked against other companies in their industry</p> <p>Only the top 10 % of companies from each industry are included in the DJSI</p>	<p>Recognisable sustainable investment benchmarking</p> <p>Listed companies aiming to differentiate in their category</p> <p>Companies looking for a high level reporting tool</p> <p>Almost a starting point</p>	<p>Not strictly a Social Value evaluation tool. It's a scoring and ranking system.</p> <p>Independent assessment: ranking is based on information volunteered by companies themselves</p> <p>Not granular enough to drive business strategy and business change</p>	<p>Sainsbury's</p> <p>Royal Mail Group</p> <p>Volkswagen</p> <p>Citigroup</p> <p>BG Group</p> <p>Alcatel-Lucent</p> <p>Air France</p> <p>KLM</p> <p>Nestle</p>	<p>Automobiles & Components</p> <p>Banks</p> <p>Capital Goods</p> <p>Commercial & Professional Services</p> <p>Consumer Services</p> <p>Diversified Energy</p> <p>Food & Staples Retailing</p> <p>Food, Beverage & Tobacco</p> <p>Health Care Equipment & Services</p> <p>Household & Personal Products</p> <p>Insurance</p> <p>Materials</p> <p>Media</p> <p>Pharmaceuticals</p> <p>Biotechnology</p> <p>Life sciences</p> <p>Real estate</p> <p>Retailing Semiconductors</p> <p>Software & services</p> <p>Telecommunication services</p> <p>Transportation and services</p>	<p>www.sustainability-indices.com</p>



The grid above is just a snapshot. Click the  TOOL link on the right to download the whole round-up.

TOOLS & RESOURCES FOR THIS SECTION



VIDEO

Watch Beth Knight from EY explain how to demonstrate value



TOOL

Round-up of common Social Value Measurement tools and methods



TOOLS & RESOURCES FOR THIS SECTION

HOW TO...

How to identify motivators and levers to get the right stakeholders on board

This is an area where our contributors have a huge amount of experience. O2's Think Big initiative is a particularly relevant example, and [Ben's interview](#) really highlights some of their key learning.

It's also an area that is easier to address if you are attuned to the needs of your stakeholders and the outcomes they seek, and are as equally open to collaboration and sharing.

In her interview, [Beth](#) mentioned the 'Mavens', 'information brokers' described by Malcolm Gladwell in *The Tipping Point*, who have the ability to start 'word of mouth epidemics'. If you can identify them (regardless of hierarchy or function), share with them and get them interested, you have a group able to help you get things in motion.

Overall, there are a few rules that all our contributors highlighted consistently:

- Having 'the top and the bottom' on board is important but not enough. Don't forget middle management: they have the power to make things happen – or not
- Understand how they receive information that they trust, and target those channels
- Segment your specific audience and always seek to be relevant: why should they care? Is this of value to them? How can you make it more valuable?

VIDEO

Watch Ben Plain from O2 explain why targeted and clever communication is key

VIDEO

Watch Beth Knight of EY explain the importance of knowing how to navigate your organisation

CASE STUDY

Read about Sainsbury's approach



TOOLS & RESOURCES FOR THIS SECTION

HOW TO...

How to embed your Social Value goal and framework effectively in your organisation

This is increasingly important, as Social Value initiatives become more integrated into mainstream business. Ensuring the benefits are visible and compelling to the business is key, as is aligning a SMART Social Value goal to one or more business priorities and helping other parts of the business achieve their objectives.

There are a number of key 'ingredients':

- Make the benefits explicit to the main business. This should be reflected both in your measurement approach and in the way you communicate Value creation outside Sustainability professionals
- Create and nurture collaborative projects. If you make a point of understanding what motivates other teams and the challenges they face, and if you can show that bringing Social Value into operations delivers better results, it's a lot easier to embed Social Value
- Earn the right to do one thing well, bring it to life and prove the benefits. Prioritising one area of Social Value and doing it well often delivers more benefits than trying to do as many initiatives as possible
- Use sustainability as a driver for innovation

VIDEO

Watch Ben Plain from O2 explain how programmes become valued

VIDEO

Watch Ben Plain from O2 explain the benefits of involving customers

VIDEO

Watch James Graham from RBS explain how to overcome resistance

VIDEO

Watch Beth Knight from EY explain why focus, consistency and incremental improvements are key



HOW TO...

In conclusion

Overall, effective Social Value measurement is as much about clarity of purpose, simple measurable KPIs and a tight step-by-step process, as it is about collecting a lot of data and using complex methodologies. Being clear about what your organisation values and what Social Value means to your main stakeholders is key.



DEFINING



TOOL

Social Value definition worksheet

Define your Social Value goal

 Download

MAPPING



TOOL

Social Value mapping template

Map out your change journey and plan your evaluation framework

 Download



TOOL

Social Value mapping example

 Download



TOOL

Social Value diagram

 Download

PLANNING



TOOL

Win-Win Social Value template

consider your business and social challenges to identify opportunities create Win Win Social Value

 Download



TOOL

Seven key questions to ask when planning your Social Value measurement

 Download



TOOL

Round-up of common Social Value measurement tools and methods

 Download

USEFUL RESOURCES

Social value – is bigger always better? *Uscreates, 2013*

SMART programmes need SMART goals. And big isn't always SMART.

[Click here](#)

The most important questions to ask before you start planning a social value programme, *Uscreates, 2013*

[Click here](#)

The Future of Social Value, Social Value Summit 2014, *Social Enterprise UK*

Find out more about how the Social Value Act is changing the context for delivering Social Value

Measuring and managing total impact: A new language for business decisions, *PWC, 2013*

Explore how developing better insights into creating sustainable value for shareholders can also sustain value for other stakeholders

The Value of Social Programmes, *The Crowd, 2013*

Get a snapshot of how leading organisations are building their social programmes, and the degree to which they are seeking to put a financial value on these programmes.

The International IR Framework, *IIRC, 2013*

Further information on how Integrated Reporting and communication about value creation will be the next step in the evolution of corporate reporting.



CASE STUDIES


CASE STUDY



Adapting the leading community investment evaluation tool for carbon offsetting projects sheds new light on Aviva’s social impact.

Read the case study

CASE STUDY



Catch22’s unique change model helps them to evaluate a social action app for young people.

Read the case study


CASE STUDY



Deloitte uses core capability to enhance Social Value through business to business partnerships.

Read the case study


CASE STUDY



By measuring Social Value, Landmarc finds clear commercial benefits.

Read the case study

CASE STUDY



A unified, cross-divisional framework enables Sainsbury’s to improve business processes while providing better support to its charity partner.

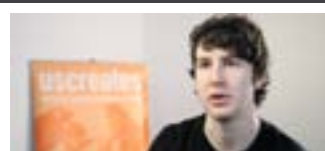
Read the case study

CASE STUDY



By outsourcing its social impact programme, Belu delivers and measures Social Value more effectively.

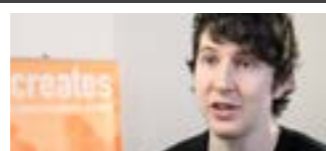
coming soon!



VIDEO

Ben Plain of O2:
How does O2 communicate its Think Big programme to its customers?

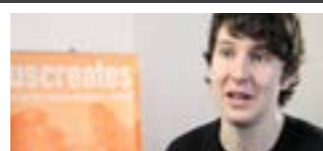
Watch video



VIDEO

Ben Plain of O2:
How O2 Interns Help build its visibility

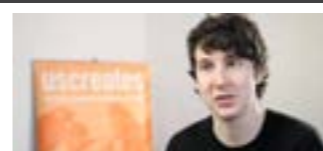
Watch video



VIDEO

Ben Plain of O2:
Choosing and motivating O2's supporters

Watch video



VIDEO

Ben Plain of O2:
Customer Stories

Watch video



VIDEO

Ben Plain of O2:
Think Big and Quantifying Positive Impact

Watch video



VIDEO

Ben Plain of O2:
Supporting Business Objectives

Watch video



VIDEO

Beth Knight of EY:
Focus, Consistency and Incremental Improvements

Watch video



VIDEO

Beth Knight of EY:
If only I'd known; Advice to my younger self

Watch video



VIDEO

Beth Knight of EY:
Understand how to navigate your organisation

Watch video



VIDEO

Beth Knight of EY:
Sustainability must be embedded in the whole organisation

Watch video



VIDEO

Beth Knight of EY:
Measuring Impact, Real Focus and Pragmatism in Business

Watch video



VIDEO

Beth Knight of EY:
Success factors for CSR

Watch video



VIDEO

Beth Knight of EY:
Diversity as a core business strategy to its customers?

Watch video



VIDEO

James Graham of RBS:
Challenging Resistance To Social Value Measurement

Watch video



VIDEO

James Graham of RBS:
Tips on Measuring Social Value

Watch video



VIDEO

James Graham of RBS:
Using the right channels for engagement

Watch video



VIDEO

James Graham of RBS:
Clarity of Purpose in Social Value Measurement Is KeyPositive Impact

Watch video



VIDEO

James Graham of RBS:
What effort for what output in social value?

Watch video



What next?

Social Value measurement is really only the start. Once you measure, you will better understand how, where and what value you create for whom. Then you are in the ideal position to build on and maximise the impact that you have and shout about it to your stakeholders. Uscreates can help in these further stages through our services in:

Strategy design and innovation to improve your change programmes and maximise impact

Communication design to communicate the value and positive impact you are creating to your stakeholders in engaging and inspiring ways

Behaviour change to unlock the barriers and triggers that sit at the heart of social challenges

Check out our site for more information.

Get involved

We encourage you to engage with us around what was most useful as well as areas of further interest. We aim to build on this work by creating new tools that delve further into common implementation challenges. Please get in touch with your thoughts.

Thank you

We would like to say a big thank you to all the contributors to this toolkit including:

Ben Plain, O2
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Beth Knight, EY
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Sophie McCready, Belu
Philip Scott, Deloitte
Matthew Roberts, Landmarc
Rachel Fairfield, Sainsbury's
Louise Kavanagh, Catch22

uscreates

*the strategic consultancy
delivering social value*



Workshop Etiquette

uscreates

- 1) New ways of working spark creativity and innovation
- 2) Two heads (or more) are better than one!
- 3) Document everything!
- 4) Play, doodle, draw; express your ideas visually
- 5) Everyone here is an expert in their own area so listen to their ideas!

Thanks.

This toolkit has been written and designed by Uscreates. For more information please contact: us@uscreates.com or call 0203 142 6686