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foyer   Project 6 - Aberdeen Foyer: an impact journey

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Social impact management: employee perceptions and experiences

In this Briefing Paper we summarise some key findings from the first phase of Project 6, during which we investigated the challenges that employees in Third Sector organisations encounter when engaging in social impact management tasks.

Background and context

Social enterprises, charities, and community organisations are increasingly under pressure to provide evidence of their organisational performance to funders and other internal and external stakeholders. In particular, they need to report on the social impact of their activities, demonstrating the difference their services, projects and interventions are making to the lives of the individuals and communities they work with. It is widely acknowledged that evidencing social impact is a challenging and complex undertaking for many Third Sector organisations. For example, the findings of the 2017 Social Enterprise Census indicate that *"the area of support most widely requested relates to help with measuring social impact".* Of the 1,037 social enterprises responding to this question in the census, 44% stated that they would benefit from help with this aspect of their work in the following 12 months.[1]

Project 6 was undertaken in partnership with Aberdeen Foyer, a leading social enterprise in Scotland. Foyer was established in 1995 in response to the issues of youth homelessness and unemployment in Aberdeen City. The purpose of this project was to co-create a social impact management process to enable Foyer to make more effective and efficient use of the data they gather, and facilitate more robust and meaningful reporting.

In preparation for our work with Aberdeen Foyer, we started the project with some exploratory research among employees and management staff in a range of Third Sector organisations. This enabled us to deepen our understanding of how social impact management activity is perceived, undertaken and experienced at delivery, operational and strategic levels.

In this Briefing Paper, we focus on the findings of our study with client-facing service delivery employees, in which we examined the challenges they face when engaging with impact management tasks.

Study overview

Our study was undertaken in six Third Sector organisations in North East Scotland. These organisations were all engaged in the delivery of projects and interventions relating to various aspects of health and wellbeing, housing, substance misuse, learning, employability, early intervention or family support. Two of the organisations in the sample identify themselves as social enterprises; one as a small-scale local charity; and three as local branches of larger national charities.

Forty interviews were conducted with client-facing service delivery staff, and focused on the aspects of impact management that these employees were directly engaged in. The interviews were recorded, transcribed and coded. Analysis of the interview data was undertaken using a thematic approach.

Our findings

The interview data revealed four broad areas of challenge for service delivery staff in relation to their impact management activities. These can be summarised as follows:

• **Understanding and sense making:** The majority of the client-facing employees we interviewed were involved with data collection, and used a range of client self-reporting tools. Some recorded data in paper-based formats, whilst others were required to enter data in databases. Some used paper-based forms when working directly with clients and then transferred the data to a database at a later stage ready for analysis and reporting by operational and/or senior managers.

Typically, the delivery staff deemed the data recording tasks to be time-consuming and bureaucratic, often perceiving them to be a rather irksome addition to their core duties of client-facing service delivery, about which many were clearly passionate. A common observation was that, whilst staff knew the data they collected were used for reporting purposes, or formed part of funder requirements, they had not been given much insight into the reporting procedures. This left them feeling somewhat disconnected from the overall process. A number commented that they would value feedback that demonstrated to them the difference their work was making.
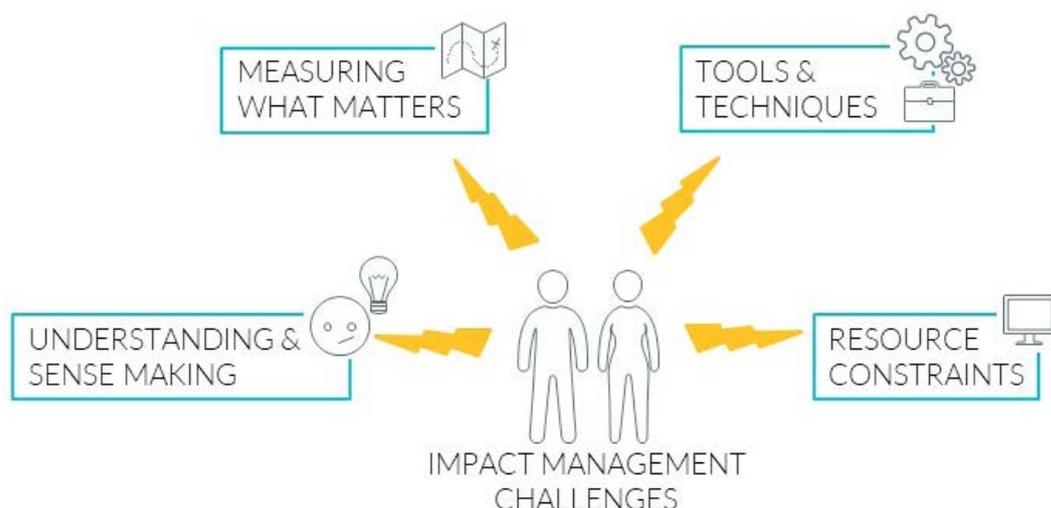
• **Measuring what matters:** Employees noted that collecting details such as basic client data and levels of service participation was important and relatively straightforward. A number commented on the complexities of capturing and reporting soft

outcomes, such as a client's growth in confidence, independence or self–esteem. There was evidence also of some frustration that clients' achievement, or progress towards achievement, of soft outcomes was often not captured, thereby limiting the true picture that could be presented of a client's journey.

• **Tools and techniques:** Some employees noted that they had to use a number of different tools and techniques for collecting client data. This arose through working with a number of funders, each with their own requirements and data recording forms and templates, or because there were a number of internal approaches in use within an organisation.

Whilst some valued the flexibility of being able to devise their own systems for specific projects, others recognised that this led to duplication of effort, and could result in errors and inconsistencies, thus adversely influencing the true impact story that could be told from their work.

• **Resource constraints:** Employees observed that their impact management activity was often hampered by a lack of access to appropriate up-to-date hardware and software. Problems were identified too with client-facing staff being "out and about" during the working day without easy access to computing facilities for logging data. A lack of connectivity between systems was also a constraining factor, making it difficult to share and aggregate data when requested by management for reporting purposes. Furthermore, a number of respondents in our study noted that their own limited IT knowledge and skills added to the burden of data capture and of meeting reporting deadlines.

MEASURING WHAT MATTERS

TOOLS & TECHNIQUES

UNDERSTANDING & SENSE MAKING

RESOURCE CONSTRAINTS

IMPACT MANAGEMENT CHALLENGES

Lessons learned and way forward

The findings of the study among client-facing staff not only provided insights into their perceptions and experiences of impact management activity, but also sparked ideas for us as to how to approach the impact management project at Aberdeen Foyer. We recognised, for example, the need to take time to understand the circumstances in which staff are working, and particularly the constraints they may be facing with regard to time and other resources.

Furthermore, we identified the importance of building rapport with staff, developing effective working relationships, and giving opportunity for everyone to participate in the co-creation of their impact management process.

We translated these lessons learned into a set of guiding principles to follow as we engaged with Foyer staff in the project.

Guiding Principles

- Proceed with sensitivity: impact management tasks are not everyone's cup of tea.
- Share the 'big picture' of the impact management project so that each person has a voice and a part to play.
- Include client journeys in the impact managment process: they demonstrate the difference made and are powerful motivators for staff.
- Recognise the resource-contrained environment in which staff may be operating.
- Be mindful of varying skill levels and training needs.
- Incorporate reporting and feedback to staff in the impact managment process so they can see the value of their work and celebrate achievements.

In the second Briefing Paper from Project 6, we report the findings of our study of management perspectives on social impact activities, and again highlight how the findings informed the design of our project with Aberdeen Foyer. In the third Briefing Paper from Project 6, we share our story of working with Aberdeen Foyer to co-create an impact management process.

[1] **Coburn, J. (2017)** Social Enterprise in Scotland: Census 2017. Glasgow: Social Value Lab. www.socialvaluelab.org.uk