THE ENGINE ROOM

Measuring the Value of Light Touch Data and Technology Support

OVERVIEW: LEARNING AT THE ENGINE ROOM

The Engine Room is a support organisation: we increase the impact of our partners by supporting the strategic application of data and technology. We contribute to systems change, but are not the sole producers of it. We are not simply aware of this fact – we use it to inform our approach to measuring impact.

This means to fully understand how we are contributing to change, we measure the actions that lead to impact and not just outputs or outcomes. We seek to maximise our contributions without taking credit for our partners' impact.

Our partners seek to increase transparency and accountability, advance human rights, and promote environmental justice, and our outcomes are meant to advance their aims. There are three outcomes that we seek: i) reduced waste, ii) decreased harm and iii) improved technical intuition around what, when and how to apply data and technology. Each of these illustrates an aspect of systems change.

We follow two principles that guide our approach to learning: i) we analyse 'impact as a process' – as a series of related steps that add up to results, and ii) we identify our 'value contribution' – the worth of our specific contributions to outcomes. Our impact starts with internal operations, continues through to interactions with partners, and finally through to reflections and storytelling. The impact process then consists of three components, and the overall value of our contributions is the combination of them:

1. **Operations** - our culture, capabilities and internal processes
2. **Support approaches** - the design and delivery of our support services
3. **Communications** - our articulation, packaging, presentation and strategic dissemination of our work

To launch a systematic assessment of our organisational impact, we began at the start of 2017 with an evaluation of one of our most strategic programmes - light touch data and technology support (LiTS). LiTS is strategic because it enables us to tailor support to meet current and emergent partner needs by both rapidly expanding our network, and exposing us to trends across the industry.

This primer documents why and how we developed a social return on investment (SROI) framework to measure the value of LiTS.

WHAT IS LITS?

Even the most effective organisations struggle to try new things. We provide LiTS support to organisations that have ideas on using technology to make their work more effective, but are unsure about how to do so. We work to flatten their learning curve by providing concise, targeted advice and bespoke support.

The LiTS process has four steps:

>1. First, we learn as much as we can about the organisation, their idea for using technology, and the system they are working to change.

>2. Then, we research organisations that have designed similar projects, and connect with our network to find out how they unfolded.

>3. We synthesise findings and reconnect with the partner organisation, sometimes assigning them 'homework'.

>4. When appropriate, we publish our findings from scoping an issue, our tools research, and useful case study development or decision-making frameworks. If an area is particularly important but lacks existing resources, we invest in building robust, publicly available documentation for others facing similar challenges.

OBJECTIVES OF THE EVALUATION

We evaluated LiTS to understand how concise and targeted data and technology support affects (positively, negatively, or neutrally) civil society recipients of it.

At the broadest level, we wanted to know whether or not this type of support is valuable. At the programmatic level, and if found to be valuable in general, we wanted to know how it is positively influencing partners' work, and also how it is negatively or not at all affecting their work. We would then use the insights to continue and expand work in areas deemed valuable, and redesign or dissolve less valuable components of the programme.

Our final aim was to produce a framework for evaluation and share it with our community, to both stimulate dialogue around a much needed area of work - impact assessment - and to offer a reusable resource for organisations to adapt to their own use cases.

APPROACH TO EVALUATION

A social return on investment framework

Social Return on Investment (SROI) is a method – adapted from conventional assessment of financial returns – used to measure the value of a social intervention or organisation. An SROI framework can be approached in a number of ways. We began by reviewing these existing approaches and analysing the level of appropriateness for use in our work. We found that while helpful to review, the frameworks available tend to apply the 'monetisation principle', which we believe is difficult and potentially misleading to apply to our type of support. For example, some approaches measure outputs that can be quantified because of alignment around their value, such as a life saved in a health-related intervention. Others quantify qualitative information that yields numbers that have little meaning.

Given this, we developed a new framework to measure actions of intermediary civil society. Importantly, this framework demonstrates how to assess:

>- support to partners (not direct advocacy or implementation); and

- data and technology advice, research, capacity building that can, but does not always, include direct work with data or technology production.

Borrowing from company valuation concepts and social sector evaluation methods, we designed an SROI framework with two main components: an *asset valuation* that measures the positive effects of our support, and a *cost valuation* that measures the opportunity cost of receiving our support.

This year we achieved the first step – assessment of our positive contributions to change. We aim to complete the second step in 2018. This primer documents the approach and results of the asset valuation.

Assessing "Social Value"

To assess 'social value', we have to first assign meaning to 'social' and 'value'. This will vary according to use case.

For our work, we define 'social' as 'systems change', or the change in a system affected by data and technology.

- The systems change can be one or more of three outcomes: i) reduced waste, ii) decreased harm, and iii) improved technical intuition around what, when, and how to apply data and technology.

- Partners seek LiTS during specific phases of a project cycle or for organisational support. Project phases include: ideation, design, implementation, growth, and iteration. Organisational support includes organisational policies and processes. Each type of support maps to a different level of potentiality for affecting outcomes. For example, support provided during the ideation phase, similar to organisational support, has the highest potential for reducing waste, mitigating harm, and building technical intuition.

We define 'value' as the effects of support on partners. Effects may be *stated* – by partners through satisfaction levels – or *observed* – around partners' decisions or capabilities. In the former case, partners tell us what type of support helped them and how. In the latter case, we see how partners make decisions or approach problems differently.

METHODOLOGY: MEASURING OUR VALUE CONTRIBUTION

To perform an asset valuation, we applied a mixed methods approach primarily using the contribution analysis method, because it aligned best with our learning objectives and principles.The method "provides evidence and a line of reasoning from which we can draw a plausible conclusion that, within some level of confidence, the programme has made an important contribution to the documented results."

To build a framework and determine the value of LiTS contributions to change, we took four steps: i) identification of where our contributions lie in a holistic change process, ii) determination of our top contributions, iii) development a contribution story, and iv) assess the value of each part of the story.

How we built the framework

1. Theory of Change development. Based on our organisational learning impact process, we developed a theory of change for our LiTS programme. We adapted the three components of the impact process – operations, support approaches, social change communications – to light touch support. The result is a three step theory of change to assess: our support design and delivery, partner needs and perceptions of support, and support use and effects.

PHASE	1 - Support Design and Delivery		2 - Partner Needs and Perceptions of Support			3 - Support Use and Effects	
GOALS	**Process** - how do we do what we do? How do we provide the support that we do?		**Support** - how is our support received? how does our support meet partner needs?			**Impact** - how do our partners use our support? what do our partners achieve with our support?	
OBJECT-IVES	Streamline & strengthen internal processes for more efficient and effective LiTS support	Build process guidance for other partners to offer our LiTS support format	Understand what support is considered valuable, when, and why	Understand what support is not valuable and why not	Learn how to expand or refine our support to best suit partner needs	Track how our support is applied by our partners (in projects, methods, organisation operations)	Determine how our support influences mindsets, behaviors, and tangible outputs (projects, tools, proposals etc.)

2. Evidence collection. Valuation, like any measurement process, begins with documentation and data collection. To put users at the center of framework, we started with bottom-up data collection. We approached both providers and recipients of LiTS to tell us about their experiences. We collected both semi-structured and unstructured feedback.

METHOD	DESCRIPTION
Experience surveys with partners	The LiTS coordinator sends out a survey immediately after completing a LiTS. We designed the survey to capture reflections on experience, measure against objectives, and assess perceived value of support.
Emails from partners	Partners provided qualitative feedback over email that often highlights their levels of satisfaction and perceived utility of the support they received.
Staff reporting	Staff that provide LiTS file a report after completion of support. We designed the report to capture basic partner information, process steps and reflections on process, and observations around the utility of support to the partner.
Interviews with key TER staff	The LiTS coordinator interviewed staff members and asked them to provide details of three LiTS that they did: the best, the most challenging, and an experience of their choice.

3. Synthesis and analysis. We analysed qualitative data in two steps. First, we aggregated the experiences — split between providers and recipients — to identify trends. Then we compared the trends across groups. We focused on positive feedback to develop key indicators of success.

METHOD	DESCRIPTION
Synthesis and analysis of internal feedback	Staff synthesised qualitative data, and identified patterns in support behaviors, challenges experienced, and perceived impact. We analysed patterns to develop visual assets including User Personas and User Journey Maps. Analysis led to typologies of service offerings and insights on when support is most useful and how it is best delivered.
Synthesis and analysis of external feedback	We reviewed external feedback to identify trends and outliers. Staff then compared internal feedback and determined when partners valued support the most. These became our support asset areas and indicators for asset valuation.

4. Building the contribution story. We identified the components of our theory of change that our asset valuation examines. We then used the indicators, and further analysis of qualitative data, to develop subindicators. We developed a valuation formula to tie each part of the measurement together to indicate a level of contribution toward systems change.

METHOD	DESCRIPTION
Development of subindicators	We designed subindicators to map to three things: a type/nature of support, a support asset area, and a level of systems change.
Development of a valuation formula	We determined that the total value of a LiTS instance is the result of the value of type/nature of support, and use of support (stated and observed effects).

GLOSSARY OF TERMS

Asset Valuation - measurement of the positive effects of support provision

Contribution analysis - an evaluation method that provides evidence and a line of reasoning that a programme has made an important contribution to documented results

Cost Valuation - measurement of the opportunity cost of receiving support.

Participatory Social Return on Investment (PSROI) - an assessment of programme costs and benefits that involves users in the data collection and analysis process

Monestisation principle - translation of social value into monetary terms

Social Return on Investment (SROI) - a method, adapted from the conventional assessment of financial returns, used to measure the value of a social intervention or organisation.

Value Contribution - the value of the contributions made to partner impact