# Valuing Social Outcomes
## Project Plan – October 2017

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The plan below for the development stage of the VSO project aims to create the right tools, conditions and relationships to complement the economic value of investments and returns in local government service delivery with a social value view. The plan proposes to achieve this through the development of a framework, and a toolkit to be applied within it, for measuring social value in local government community development initiatives. A further stage of the project then seeks to build on this through the development of a strategy for encouraging wider adoption of the philosophy and methodology across the sector and across a broader cross-section of local government responsibilities.

| | | Project outputs — Broad actions — Timing — Resources | | |
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| **Currently funded project – Development stage** | **Framework** | 1. Engage a consultant to develop a framework that considers both monetary and non-monetary social value created through community development initiatives of local government with a link to community wellbeing and using an agreed language for articulating social value.<br>2. Base the framework on community development principles and theories of change to ensure it is grounded in community strengths and aspirations.<br>3. Establish or connect with a network of interested parties including the university and NGO sectors.<br>4. Develop an engagement and communication strategy that will assist in identifying champions of the local government social value measurement cause to improve the likelihood of success.<br>5. Refer to recommendation 2 in the AITI research report. | Jan–Jun 2018<br><br>Existing funding | |
| | **Toolkit** | 6. Engage a consultant to develop a simple decision-making toolkit (forecasting and evaluative) that is easy to use and access, is tailored for various practitioner levels, has multiple entry points, uses practical indicators and that integrates with existing systems (plans, IT, data capture) wherever possible.<br>7. Work with SIMNA and other key organisations to test the toolkit in a manageable way so as to maximise its relevance and useability in the local government context.<br>8. Hold sector launch event to raise sector awareness of the framework and toolkit, evaluate project to date and complete final report to the LGA.<br>9. Refer to recommendations 1, 3 and 4 in the AITI research report. | Jan–Jun 2018<br><br>Existing funding | |
| **Further project stage** | **Strategy** | 10. Seek funding to support the piloting of the VSO Framework and Toolkit on a selected range of community development projects with a cross-section of councils, ensuring the upskilling of staff where needed.<br>11. Based on evidence from the pilots work collaboratively with key partners to develop a strategy for rolling the toolkit out across the sector and broadening its scope beyond community development initiatives.<br>12. Consider periodic review and adaptation of the framework and toolkit to respond to changing context and the role of local government.<br>13. Look for synergies with local government systems / processes / reporting requirements already in place to further support wider use of the VSO Framework and Toolkit and share outcomes of its use across the sector, potentially through a bank of values and measures for easy application.<br>14. Refer to recommendation 1 in the AITI research report. | July 2018 – Jun 2019<br><br>Additional funding needed | |

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The Framework and Toolkit will be developed within resources gathered by the project (LGA funding and partner council contributions through the Local Government Professionals SA Community Managers Network. A consultancy will be engaged to establish the framework, develop the toolkit and refine them both through testing.

Further funding will be sought for the Strategy stage of the project. As part of this stage the toolkit will be piloted in community development projects to provide learning and evidence, legitimising and gaining traction and commitment for social value as a key measure of local government's role in improving quality of life. This is an opportunity to support the sector in using intrinsic human values as a basis for determining direction and assessing success of community development initiatives.

This plan has been developed by the Valuing Social Outcomes (VSO) Steering Group in response to funding received from the Local Government Association Research and Development Scheme, the VSO research report by Flinders University – Australian Industrial Transformation Institute and workshops with stakeholders, including 18 August 2017 at City of Charles Sturt, facilitated by Jane Trotter.

Prior to implementing this plan it will be important to:
a) consider relevant tools in current use/development to better understand the market
b) consider related projects aimed at measuring community outcomes (eg health and wellbeing)
c) consider the impact of the changing role of local government (ongoing).

### Response to recommendations in AITI research report – August 2017

| AITI recommendation | Relationship to this plan |
|---|---|
| **Recommendation 1:  Develop a South Australian Local Government Social Value Policy that embeds social value measurement in local government. The Social Value Policy should link to the wider LGA SA policy context and make reference to the Policy Manual of the LGA SA (2015).**<br><br>**Policy focus areas should include:** | Recommended policy to be developed as a strategy in third stage of this plan (Strategy). |
| ◆ LGA SA to pursue a three-year program of collaborative social value measurement pilot 'lighthouse' projects (potentially two projects per year), each targeting an area of high relevance and strategic interest to SA local government (VSO Stage 3). | Pilot projects to be run in second stage of this plan (Toolkit). |
| ◆ Implementing a communication and engagement strategy to bring all levels of local government, council members and the community on board. | Communication and engagement strategy to be developed in first stage of this plan (Framework) and updated in both subsequent stages. |
| ◆ Forming a dedicated Social Value Measurement Network or leveraging existing networks (e.g. Community Managers Network, Social Impact Measurement Network of Australia, Social Planners Network, Creative Communities and others) to progress a social value measurement agenda in SA local government. | Network to be established or connected with in first stage of this plan (Framework). |

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| ◆ Supporting internal capacity through the professional development and training functions of organisations such as LGA SA and Local Government Professionals Australia SA. | Upskilling of staff to be undertaken in conjunction with pilot projects in second stage of this plan (Toolkit) and included in third stage of this plan (Strategy) for broader rollout. |
| ◆ Ongoing evaluation and refinement of the SA local government social value measurement approach. | Periodic review and adaptation of the framework and toolkit to be included in third stage of this plan (Strategy). |
| **Recommendation 2: Develop a Valuing Social Outcomes (VSO) Framework for South Australian Local Government through a series of workshops with stakeholders designed to form agreement on:** | First stage of this plan (Framework). |
| ◆ The core values and principles of a social value measurement approach for local government. | Principles to be developed in first stage of this plan (Framework). |
| ◆ Key attributes of a fit-for-purpose social value measurement approach (e.g. comparability, robust/evidence based etc.). | Key attributes to be developed in first stage of this plan (Framework). |
| ◆ A method for measuring/valuing agreed social outcomes, giving consideration to the utility of common outcomes frameworks and monetisation of social outcomes. | Measurement methodology to be selected/developed in second stage of this plan (Toolkit). |
| ◆ Mapping a social outcomes framework (in reference to a specific VSO project); viewing this in the context of theory of change models. | Explore theories of change in first stage of this plan (Framework). |
| **Recommendation 3: Develop a user-friendly social value measurement tool for application in individual projects/programs, providing the following features:** | Second stage of this plan (Toolkit). |
| ◆ Outcome mapping (identifying/entering outcomes, indicators, measures). | Indicators and measures to be selected in second stage of plan (Toolkit). |
| ◆ Assigning monetary values (from evidence or a social value bank). | Monetary values to be ascribed in second stage of plan (Toolkit). |
| ◆ Inbuilt calculation of impact. | Toolkit to enable calculation of impact. |

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| **Recommendation 4**: Develop a social value measurement toolkit that will support local government to produce statements of social return regarding community initiatives. The online toolkit should include: | Second stage of this plan (Toolkit). |
| ◆ A basic introduction to social value measurement and outline of related tools relevant to the local government context, including what skills and resources are required for each, set out in accessible, easy to understand language. | Second stage of this plan (Toolkit). |
| ◆ A decision-making matrix/tool to guide the use of different methodologies, including a staged approach in terms of sophistication according to need and capacity (including when external support might be required). Highlight which tools have the potential to forecast and/or retrospectively quantify the social value of community actions. | Second stage of this plan (Toolkit). |
| ◆ The Social Value Measurement Framework for SA Local Government. | First stage of this plan (Framework). |
| ◆ The customised social value measurement tool for application in individual projects/ programs. | Second stage of this plan (Toolkit). |
| ◆ Links to other existing social value measurement tools and resources (e.g. guides, frameworks, social value banks, community indicator banks, wellbeing measures, data entry tools such as the Greater Manchester CBA Excel spreadsheets). | Second stage of this plan (Toolkit). |
| ◆ Exemplar case studies to demonstrate what can be done/achieved at different scales of size and complexity (local, national, international). | Pilot projects run in second stage of this plan (Toolkit) and shared through third stage of this plan (Strategy). |

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**Response to next steps recommended by Jane Trotter – August 2017**

| Jane Trotter recommended next step | Status/action |
|---|---|
| 1. Review project scope and determine what additional work needs to be undertaken prior to the development of the tool kit. | Development of this plan. |
| 2. Consider timing of whole project – what is within scope of the original project/budget and what is out of scope. | This plan details three elements:<br>1. Framework – current project<br>2. Toolkit – current project<br>3. Strategy – future project. |
| 3. Determine resourcing requirement of next steps (in context of project budget)<br><br>  a. *many of the recommendations in the report assume both resourcing and buy in from the LGA in particular*<br><br>    i. *there won't be additional R&D funds available until the next round in 2018*<br><br>    ii. *LGA will require more progress and evidence of success before committing to a strategy / additional resources*<br><br>  b. *If additional resources are required in the short term – the Network/Steering Committee will need to identify alternate funding sources.* | Further funding will be sought for the Strategy stage. |
| 4. The Steering Group may need to renegotiate project timing and allocation of budget with LGA. | An extension was negotiated with the LGA to 30 June 2018 for the delivery of the current project (Framework and Toolkit). |
| 5. Consider reshaping the report recommendation of a VSO Policy into a VSO strategy – to be developed after the tool/toolkit has been developed and piloted. The LG Act could be referenced as the Policy. | The report recommendation will not be changed, but will be actioned as a strategy per this plan. |
| 6. Identify potential projects/Councils to pilot the tool / toolkit - bring on board early. | Champions identification during first stage of this plan (Framework).<br><br>Projects identified for testing the toolkit during second stage of this plan (Toolkit). Further, more comprehensive pilots to be considered in the third stage (Strategy). |
| 7. Develop engagement/communication strategy for the project. | During first stage of this plan (Framework). |