

Performance analysts crucial to delivering impact, new report reveals

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A new report, jointly published by Impetus – The Private Equity Foundation (Impetus-PEF) in the UK, Social Investment Lab in Portugal, and Think Impact in Australia, demonstrates how crucial social performance analysts are for organisations who aim to deliver impact. Without a dedicated performance analyst, organisations will struggle to make data on social programs more meaningful and useful.

Delivering the Promise of Social Outcomes: the Role of the Performance Analyst is an international collection of case studies featuring people who have successfully applied social service data to help executives make decisions, managers support their staff and – importantly – enable service delivery staff to improve the lives of their clients. The report features UK based organisations who are leading the way in effective performance management systems including CHAIN UK, St Giles Trust UK and Social Enterprise Northwest.

Written by Sydney-based social impact analyst Emma Tomkinson, the report argues for greater investment in back office capabilities, contradicting one view that administrative spending should be trimmed in social programs.

Tomkinson said she initially set out to discover what made a perfect case management IT system. But as her interviews progressed, it became apparent that key to successful social service organisations were the relationships between its performance analysts and service delivery staff.

“Over and over again, people told stories about the positive feedback loops created between stakeholders, rather than the answers provided by their IT system,” she said. “What struck me was how insufficient our analytical capacity is as a sector. If we are serious about continuous evaluation and improvement, then we don’t just need good IT systems, we need people to make them relevant.”

CEO of Impetus-PEF, Daniela Barone Soares, said she hoped *Delivering the Promise of Social Outcomes* would encourage performance analysts to recognise, discuss and disseminate the valuable results of their work.

“We also hope it will inspire charity CEOs and boards to take seriously, and invest in, performance management. As this report shows, the work of the analyst is special and specialised. But what the work represents is a commitment to accountability and impact, which should be central to any social organisation, from the boardroom to the frontline.”

The report highlights three key trends on why investing in performance management systems and their analysts is urgently needed:

- Outcome based contracts, where service delivery organisations are paid on the basis of the social outcomes they achieve, are proliferating
- Social impact bonds, where investor returns are dependent on the social outcomes achieved by the programs they invest in, are increasingly emerging
- The idea of ‘collective impact’ is rapidly gaining traction due to its requirement that organisations collaborate to deliver social outcomes.

This type of capacity building was backed up by a working group for the UK Advisory Board to the G8 Social Impact Investing Taskforce, which wrote in its 2014 report that:

“There are two types of organisational capacity building required by the social sector – one is around building strong resilient organisations which can grow sustainably. The other is around building organisations which can reliably and predictably produce meaningful social outcomes, eventually for large numbers of people. Both are crucial for the social investment market to flourish, but the latter has been neglected in attempts to develop the market.”

Daniel Miodovnik, from UK not-for-profit Social Finance, is one of the performance analysts featured in the report. “It’s not enough to say we’ve provided support to 60% of the people on our services,” he notes.

“We need to identify the 40% who didn’t access or take advantage of the program, understand why, and have strong enough relationships with delivery staff to discuss the reasons and change the service. We celebrate the 60%, while working to ensure the remaining 40% are able to access the support they need to achieve their goals.”

The report can be read and downloaded at <http://deliveringthepromise.org/>, which goes live on 10 February 2015.

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-Notes for editors-

About the publishers

Impetus-PEF is committed to transforming the lives of 11-24 year olds from disadvantaged backgrounds by ensuring they get the support they need to succeed in education, find and keep jobs, and achieve their potential. It finds the most promising charities and social enterprises that work with these children and young people. It helps them become highly effective organisations that transform lives; then helps them expand significantly so as to dramatically increase the number of young people they serve.

The Social Investment Lab is a not-for-profit organisation that works with social entrepreneurs, investors and the public sector to identify, implement and disseminate innovative ways of financing social innovation to tackle prominent social issues in Portugal and Portuguese-speaking countries.

Think Impact combines rigorous social impact analysis with data visualisations and filmed stories of change. It helps social purpose organisations understand the changes they create and hear the voices of their stakeholders. Its products are a precious resource for enhancing impact and a unique tool to engage supporters, funders and stakeholders.

About the author

Emma Tomkinson is a social impact analyst who works on a range of measurement and investment projects for social purpose organisations. She takes a quantitative approach to social problems and programmes and believes in using and creating evidence for continuous improvement. [Emma’s blog](#) contains information about her work and articles she has written.

Emma has worked in the Centre for Social Impact Bonds in the UK Cabinet Office, the Third Sector Team at the UK National Audit Office, NSW Department of Premier and Cabinet, NSW Treasury and the Board of Studies NSW. She has also worked in not-for-profit organisations, for the Centre for Social Impact in NSW and Social Finance in the UK. Emma is an active member of several global networks, researching for and speaking to government and not-for-profit audiences.

Emma has written extensively about social impact bonds and social impact measurement. In 2013 she created the [*Social Impact Bond Knowledge Box*](#) for the Centre for Social Impact Bonds at the UK Cabinet Office, which included contributions from stakeholders around the world. Emma also co-authored the 2013 academic case study [*The Peterborough Pilot Social Impact Bond*](#) for Saïd Business School, University of Oxford. In Australia, Emma delivered the Social Finance Forum conference and workshops for the Centre for Social Impact. She is the author of their conference report [*Social Impact Bonds: An Australian Snapshot*](#) and their paper [*A User's Guide to Australian Charity Data*](#). She has guest-lectured undergraduate, post-graduate and executive education classes at the University of Oxford, University of Western Australia, University of Sydney, University of Technology Sydney and University of New South Wales.

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