

IDENTIFYING EVALUATION MEASURES

socialimpactadvisors



socialimpactadvisors

Intended impact refresher

Intended impact forms the foundation of theory of change

Theory of Change

What will we achieve?

What **outcomes** will we hold ourselves **accountable** for achieving...

Intended Impact

For whom/where?

...for for **which beneficiaries/ audiences and/or geography...**

- Population (e.g., age, gender, socio-economic status, residents, visitors)
- Organization type (e.g., businesses, industry, landlords)
- Geography (e.g., in Greater Hamilton)

When?

...in what **timeframe...**

Must be specific, measurable and realistic!


How?

...with what **activities?**

Two questions can help crystallize an intended impact statement



Is it specific?



How realistic is it -
does it describe
“accountability” or “hope”?

What information would help you to see how well you are doing against your intended impact?

Intended Impact Examples

- Save \$10k by December
- By 20xx, 1000 organizations pledge to reduce their GHGs by 10%
- By 20xx, 1000 organizations reduce their GHGs by 10%

Evaluate by:

- Total amount saved, by week or month
- # organizations pledging, per month or year
- Total # of organizations reducing by 10%, per year
- Per organization - baseline GHG, current GHG, % change in GHG; per year

Checking your Intended Impact Statement

- Can you land on one primary progress measurement for your impact, and frequency?
- How do you feel about assessing your intended impact statement and the success of your project, based on the measure you came up with?
 - *Use this to decide if your statement is set or needs revision*

Can you reasonably measure your intended impact? What baseline data do you have?

What is the current state of the issue you are addressing?

- How big is the issue?
- What is the trend?
- Do you have data on demographics?
- Environmental statistics?
- Where/how might you get data?

What program data do you have?

- How many have been involved? For how long?
- How well are the current actions working?
- What is the ideal situation for success (what are the circumstances or context)?
- For what sort of beneficiaries?

What data might you want and where might you look for it?

*Does your intended impact statement seem realistic?
Have you identified any additional strategies/actions?*

Theory of Change with Embedded Measurement

Intended Impact Statement

Strategies & Actions

Measurable Action Objectives

By 2030, all existing single-family homes in X region, built before 1980, will have undergone retrofits that achieve a minimum 40% energy savings over baseline levels.

Primary progress measure:

of homes retrofitted per year achieving 40%+ energy savings

S1: Increase supply of skilled trade labour

- Work with post-secondary institutions to augment existing/develop new curriculum
- Provide training subsidies for unemployed workers

S2: Increase residents' energy literacy, and awareness

- Develop marketing strategy and branding for program
- Conduct energy workshops
- Encourage neighbor-neighbor sharing of information

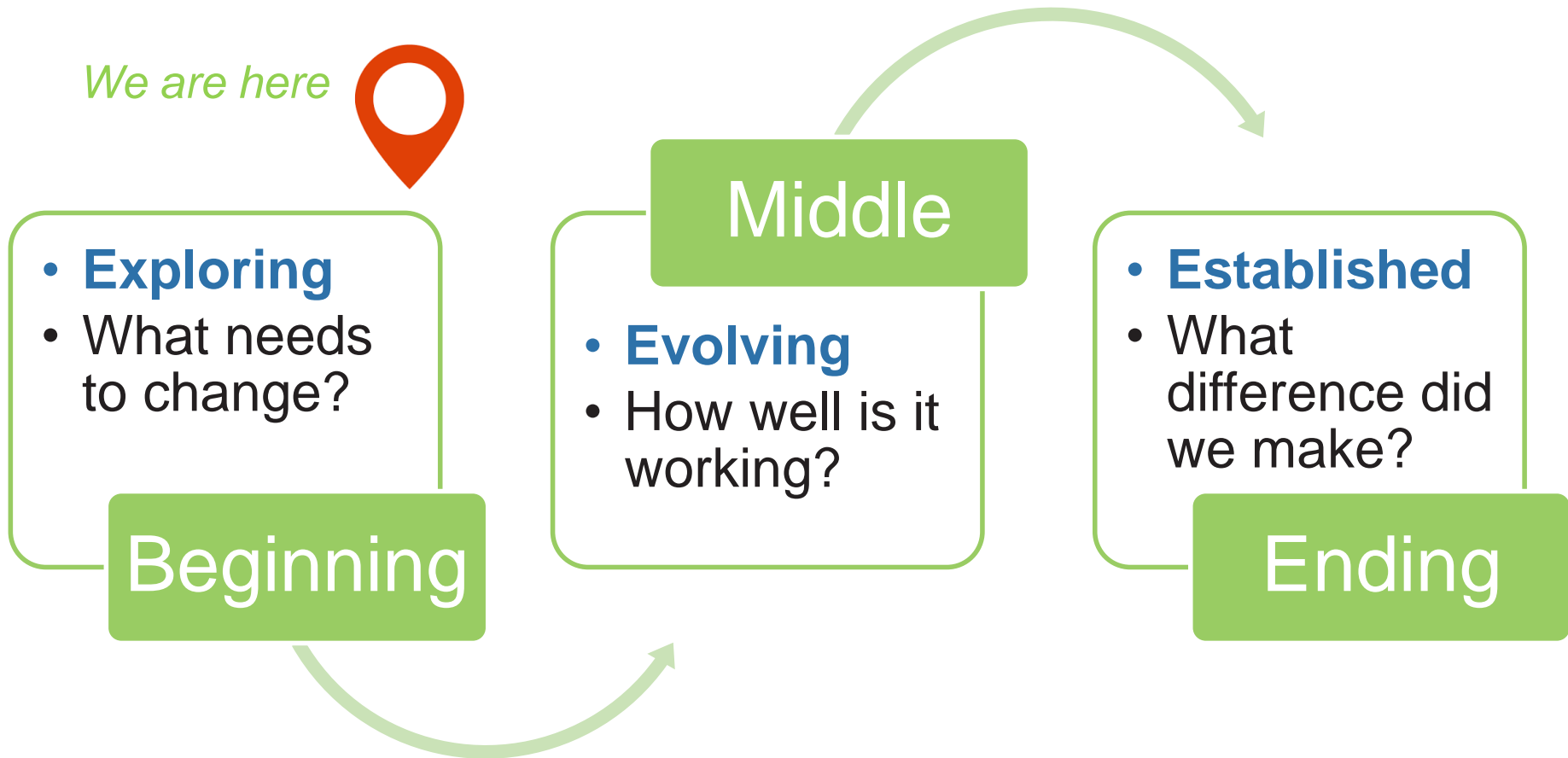
S3: Develop energy retrofit financing offer

- Develop business case for retrofit financing
- Establish financing mechanism (e.g. LIC/on-bill/other)
- Issue bonds to raise capital

S4: Aggregate demand by housing archetypes

- Identify neighbourhoods with high numbers of common pre-1980 archetypes
- Develop localized marketing strategies

Evaluation and measures - change over time



Effective measurement and evaluation

- ✓ Has a clear purpose - what questions are we trying to answer?
- ✓ Is actionable – what will we do with the info?
- ✓ Asks important, big-picture questions
- ✓ Asks the right people: stakeholder engagement
- ✓ Provides insights



Examples of evaluative questions

Action or output measures

- How many people attended the workshop?
- How many people downloaded the resources?
- How many people visited the area?
- How many partners are connected to the network?

Evaluative measures

- What did participants gain from the workshop?
 - What did they learn?
 - How did their attitudes change?
 - What could now change as a result?
- What actions do they take following the workshop? What impact does that action have?
- Where are we more successful? What context or characteristics?

Theory of Change with Embedded Measurement

Intended Impact Statement

By 2030, all existing single-family homes in X region, built before 1980, will have undergone retrofits that achieve a minimum 40% energy savings over baseline levels.

Primary progress

measure:

of homes retrofitted per year achieving 40%+ energy savings

Strategies & Actions

S1: Increase supply of skilled trade labour

- Work with post-secondary institutions to augment existing/develop new curriculum
- Provide training subsidies for unemployed workers

S2: Increase residents' energy literacy, and awareness

- Develop marketing strategy and branding for program
- Conduct energy workshops
- Encourage neighbor-neighbor sharing of information

S3: Develop energy retrofit financing offer

- Develop business case for retrofit financing
- Establish financing mechanism (e.g. LIC/on-bill/other)
- Issue bonds to raise capital

S4: Aggregate demand by housing archetypes

- Identify neighbourhoods with high numbers of common pre-1980 archetypes
- Develop localized marketing strategies

Measurable Action Objectives

- # of skilled trades firms are registered and approved to deliver energy retrofits

- % residents report high levels of awareness of energy savings opportunities

- \$X in capital is available annually for retrofit implementation

- # neighbourhoods and # homes, participating

Refining our Theory of Change and measurement



Does it seem realistic to capture progress against your intended impact statement?



Note any additional strategies/actions needed in your Theory of Change, identified by talking about measurement.



Capture important interim measurements, typically by strategy