

CREATING AN EVALUATION PLAN

socialimpactadvisors



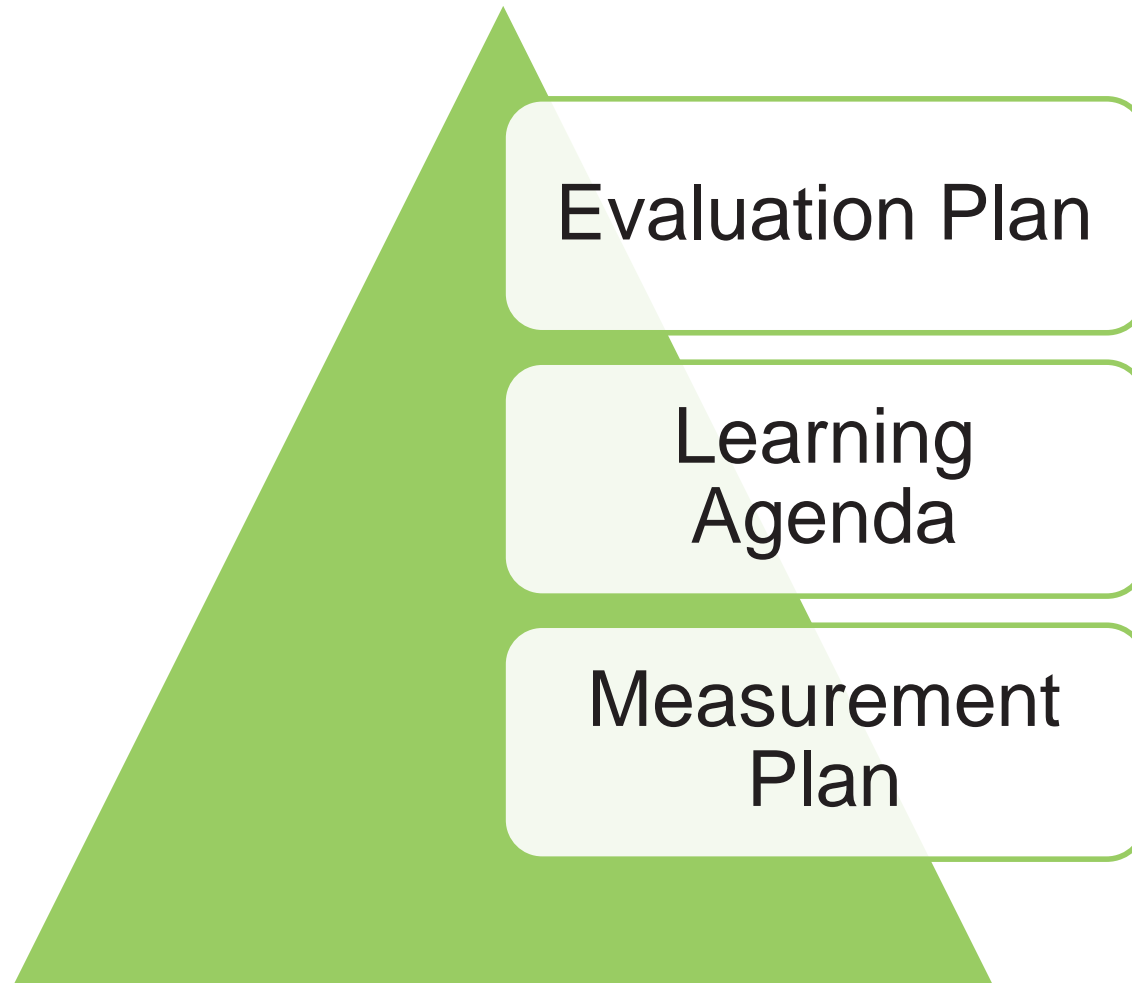
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Evaluation Plan

*Now that you know
what to measure
and evaluate, how
will you do it?*



Three Layered Approaches



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

Three Layered Approaches

- Where will you capture the data?
- Who will capture the data?
- When? How often?
- What tools are needed?
- Can we reasonably collect it all?
What are the priorities?



Measurement
Plan

Three Layered Approaches

- What more do you want to intentionally learn as you live into your Theory of Change, to better understand the issue and solutions?

(E.g., under what circumstances are you successful?
With whom? In what context?)



Learning Agenda

- What additional data do you need to begin to capture to provide insights into your results?
 - When will you capture & review it?

Three Layered Approaches



Evaluation Plan

- What interim targets must you achieve to achieve your intended impact?
- How have you done against these targets?
 - When will you review it? Who should be involved?

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- **By 2022, 30 skilled trades firms** are registered and approved to deliver energy retrofits

- **80+%** of X region residents report high levels of awareness of energy savings opportunities

- **\$50M** in capital is available annually for retrofit implementation

- **By 2022, five neighbourhoods** representing **1500 homes** have had **80% participation rate**

Three Layered Approaches

