Impact-based M&E

Monitoring and Evaluation for Social Enterprises

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Hello!

I've been working in the development sector for several years and helped design, monitor, and evaluate programs focused on social protection and development.

Learning Sessions on Impact

Impact Value Chain
(Theory of Change)

What impact to make and how to make it happen

Impact Management

How to measure impact and use it for decision-making

Impact-oriented M&E

How to monitor and evaluate with impact in mind

What's in store?

- Basic concepts and principles of an impact-oriented monitoring and evaluation system
- Introduce tools for monitoring and assessing social enterprises

What's in store?

01

What is an impact-oriented M&E system?

02

Why and when should impact be considered in M&E?

03

How to create an impact-oriented M&E system?

01

What is an impact-oriented M&E?

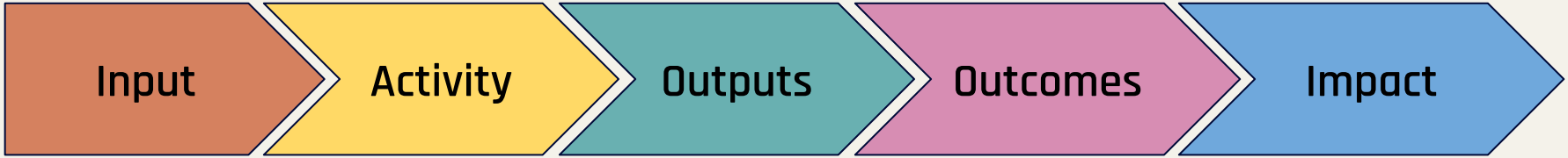
PROBLEM

Social enterprises try to contribute in solving social problems

SOLUTION

They try to address this through services and/or products that help communities

What do we mean by impact?

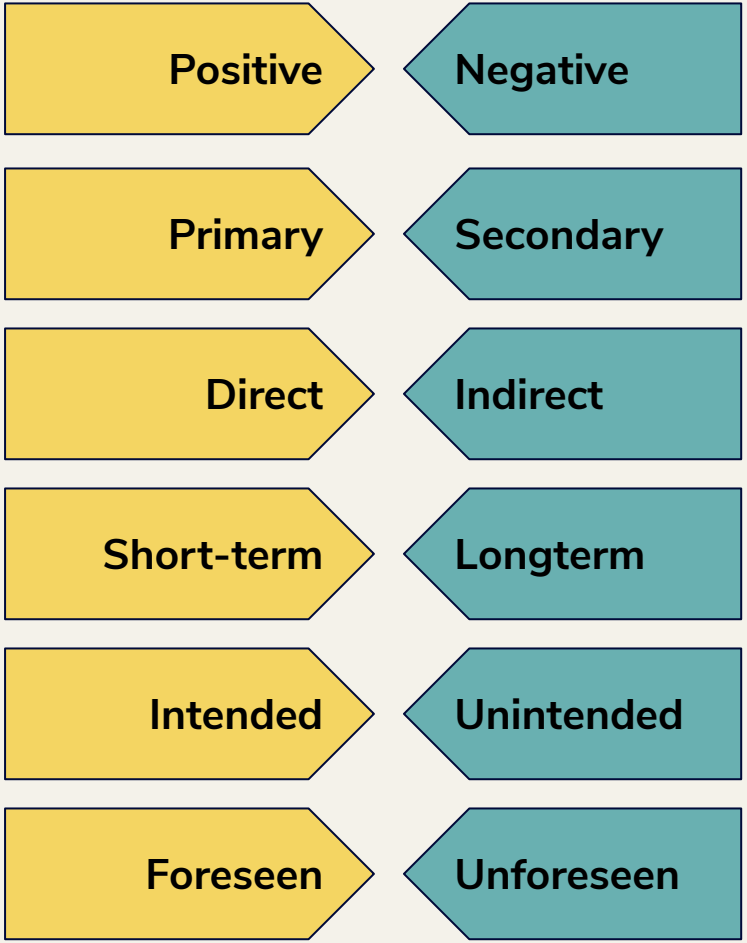


Input	Activity	Outputs	Outcomes	Impact
Resources that support activities	Tasks that support impact objectives	Tangible products, services, practices that result from the objectives	Immediate changes and effects that follow from the delivery of products and services	Long-term changes or effects on society or the environment that follow from the achieved outcomes

What Do we mean by Impact?

Dimensions of Impact

Source: Hearn and Buffardi, 2016

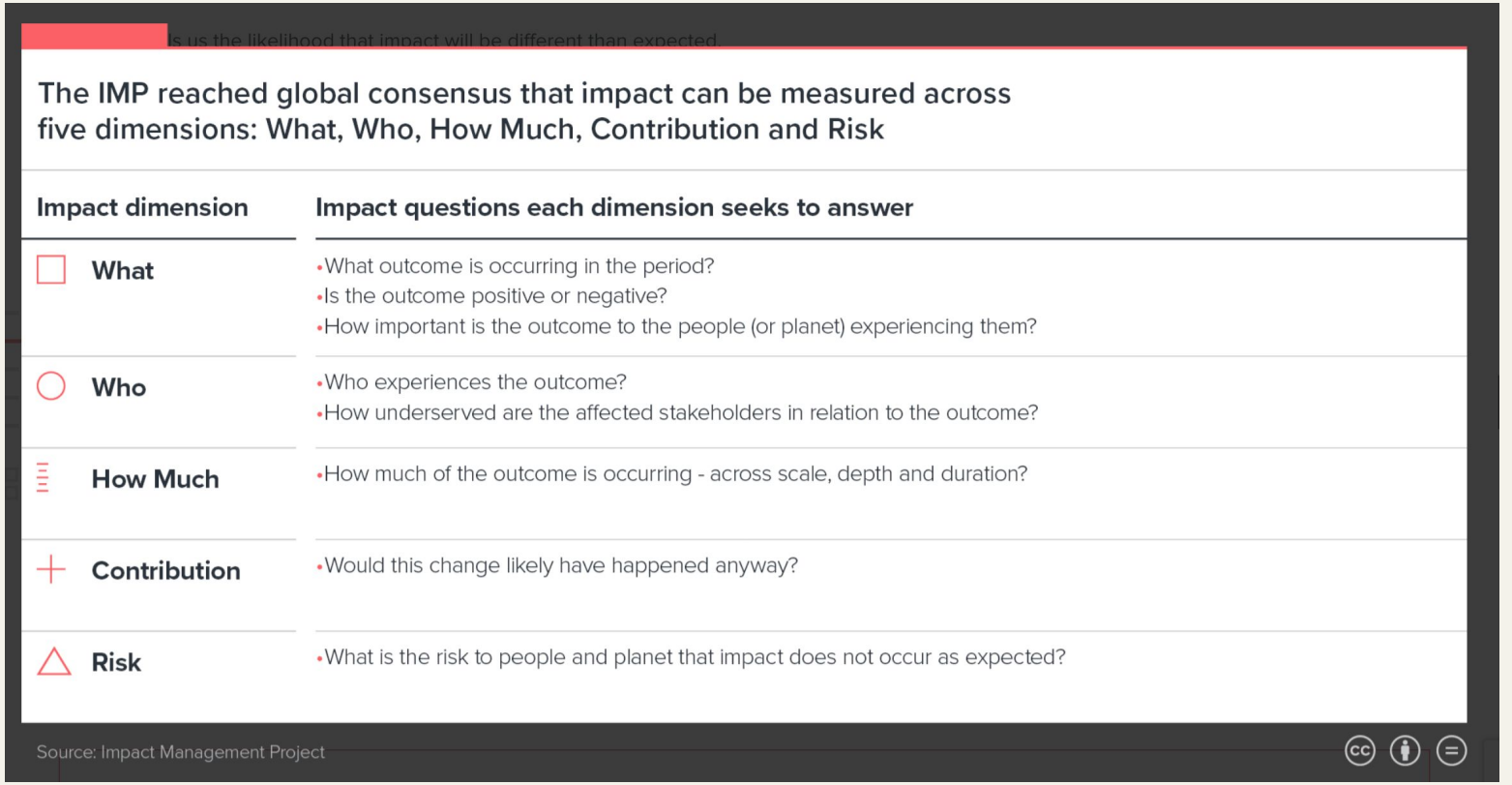


What do we mean by impact?

	Intended	**Positive** Unintended	**Negative** Unintended
Foreseen	Program or policy goals	Spillover effects	Side-effects
Unforeseen	Emergent goals	Nice Surprise	Calamity, mishap, backlash

Source: Ling, 2014

What do we mean by impact?



is us the likelihood that impact will be different than expected.

The IMP reached global consensus that impact can be measured across five dimensions: What, Who, How Much, Contribution and Risk

Impact dimension	Impact questions each dimension seeks to answer
What	•What outcome is occurring in the period? •Is the outcome positive or negative? •How important is the outcome to the people (or planet) experiencing them?
Who	•Who experiences the outcome? •How underserved are the affected stakeholders in relation to the outcome?
How Much	•How much of the outcome is occurring - across scale, depth and duration?
Contribution	•Would this change likely have happened anyway?
Risk	•What is the risk to people and planet that impact does not occur as expected?

Source: Impact Management Project

Classifying an enterprise's individual impacts into A, B or C

Illustrative example of a healthcare company

Dimension		Assessment		
		Effect #1: **CO2 emissions**	Effect #2: **Customer of service**	Effect #3: **Care worker wages**
What	What outcome(s) do enterprise activities drive? How important are the outcomes to the people (or planet) experiencing them?	Important negative outcome: CO2 emissions	Important positive outcome: Access to healthcare services	Important positive outcome: Decent income
Who	Who experiences the outcome? How underserved are they in relation to the outcome?	The planet, underserved	Customers, not underserved	Employees, underserved
How Much	How much of the outcome occurs - across scale, depth and duration?	Marginal depth	At scale; marginal change	Deep change, at scale, long-term
Contribution	Would this change likely have happened anyway?	Likely to have occurred anyway	Likely better than what would have occurred	Likely better than what would have occurred
Risk	Which risk factors are material and how likely is the effect different from the expectation?	Low risk	Medium risk	Low risk
		↓	↓	↓
		Act to avoid harm	**Benefit stakeholders**	**Contribute to solutions**

Source: Impact Management Project

What is Monitoring & Evaluation?

Monitoring

Routine tracking of information about a program/project

Measurement of progress toward achieving program/project objectives; most often involves counting what we are doing.

Tracks program/project costs and processes

Provides basis for program/project evaluation when linked to a specific program/project

Evaluation

Comprehensive evaluation is based on research and analysis

Rigorous, scientifically based analysis to determine the merit or worth of a specific program/project.

(Requires study design; sometimes a control or comparison group; often measurement over time).

Analysis of monitoring data to improve programs/projects and inform decisions about future resource allocations

Source: USAID, Measure Evaluation

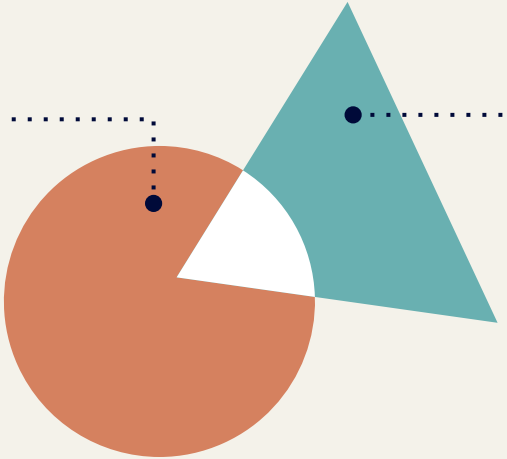
What is Monitoring & Evaluation (M&E)?

Monitoring

Are we doing things right?

Evaluation

Are we doing the right thing?



M&E Organizing Framework

MANAGE

Roles and Responsibilities

DEFINE

Intervention (Program/Policy)

FRAME

Purpose and Standards

DESCRIBE

Description of the intervention

CAUSALITY

Extent intervention caused outcome/impact

USE

Decision-making and learning

Source: BetterEvaluation.org

Impact Evaluation

Descriptive

Causal

Evaluative

Impact Monitoring

Tracking of impact-level results but no causation

Feedback mechanism

What is an impact-oriented M&E?

Tracking and judging impact-level results in addition to short-term outputs and intermediate outcomes

- Information on the **intervention/program**
- **Context** of the intervention (economic, social, political, and physical environment)
- Initial **evidence of changes** (observed or potential)
- Information to build **questions on relevance, impact, data sources**

Source: Perrin, 2012

What is an impact-oriented M&E?

INTEGRATES

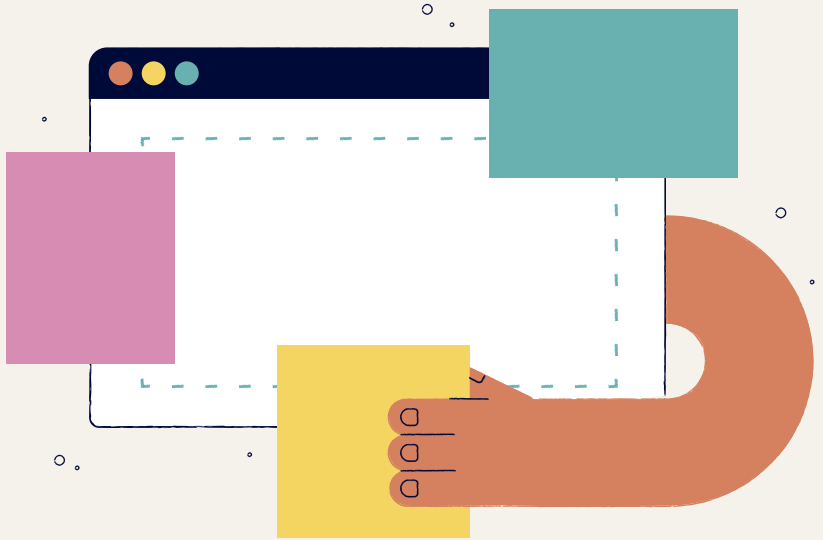
- Tracks, describes, and judges impact-level results and information

UNDERSTANDS

- Clarity of intervention, M&E concepts, roles & responsibilities

ENGAGES

- Implementer and stakeholders in the design, implementation, and management of M&E



02

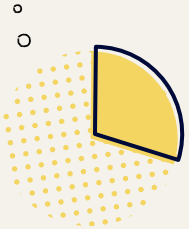
Why and when should we consider impact in our M&E systems?

Why should you consider impact in M&E?

Sources: IEG 2009, CONCORD 2010, Guniea et al., 2015, Vaessen et. al., 2014

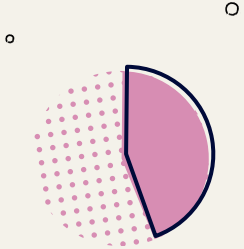
1. **Shifting the focus** from outputs to impact
2. Improving **availability and quality of data** for impact assessment
3. Timely and relative data for **adaptive management** of your program or intervention
4. Creating space for **collective-sense making** of the intervention

Realistic Considerations



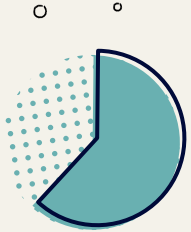
Few

Impact Evaluations



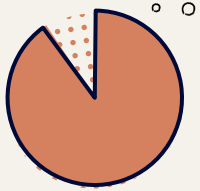
Some

Outcome Monitoring /Evaluation



Most

Process Evaluation



All

Input/Output Monitoring

When should you consider impact in M&E?

1. M&E efforts match with **decision-making needs**
2. Determine and evaluate:
   a. *is impact there and* ***can be observed?***
   b. *will impact findings* ***be used?***
3. Adequate **capacity and resources** available within the enterprise

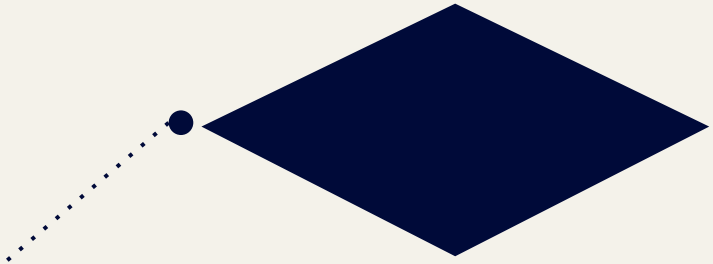
03

How to create an impact-oriented M&E?

Building Blocks of Impact-Oriented M&E

- What needs to be monitored or assessed?
- What impacts or outcomes can be observed?
- How will data be analyzed?
- What existing data can be used and what should be collected?

Impact Value Chain/Theory of Change



Data needed to make informed decisions

Desired action

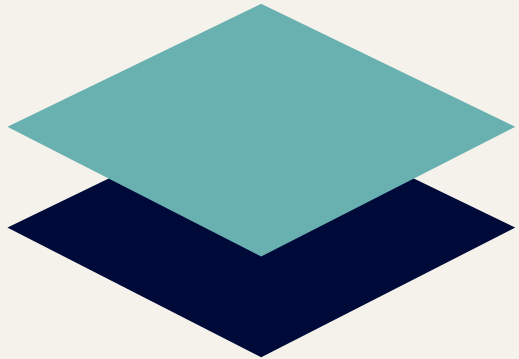
Question Set:	Value Proposition	Customer Satisfaction	Meaning-fulness	Outcome Measure-ment	Poverty Profile	Customer Archetypes
Amend design of product / service to better meet customer needs	●	●		●		
Align marketing messages to value prop that resonates most with customers	●		●	●		
Make quick-win changes to improve customer satisfaction		●				
Provide donors/investors with real impact data; access additional grant funding			●	●	●	
Identify ways to reach more low-income customers	●				●	
Target customers more effectively along attitudinal dimensions						●

Source:
Lean Data

Building Blocks of Impact-Oriented M&E

- How are we faring compared to goals and targets?
- How are we really creating transformation?
- How can we improve?

Balance Accountability & Learning

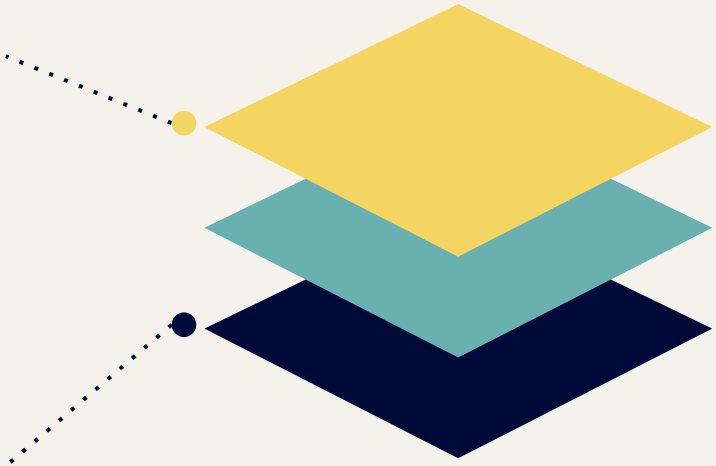


Impact Value Chain/Theory of Change

Building Blocks of Impact-Oriented M&E

Prioritizing data for Impact

- How is data available matched with decision-making needs?
- What do we need to understand more in the program, therefore need to conduct M&E?
- What is relevant for stakeholders?
- What is feasible to do?



Impact Value Chain/Theory of Change

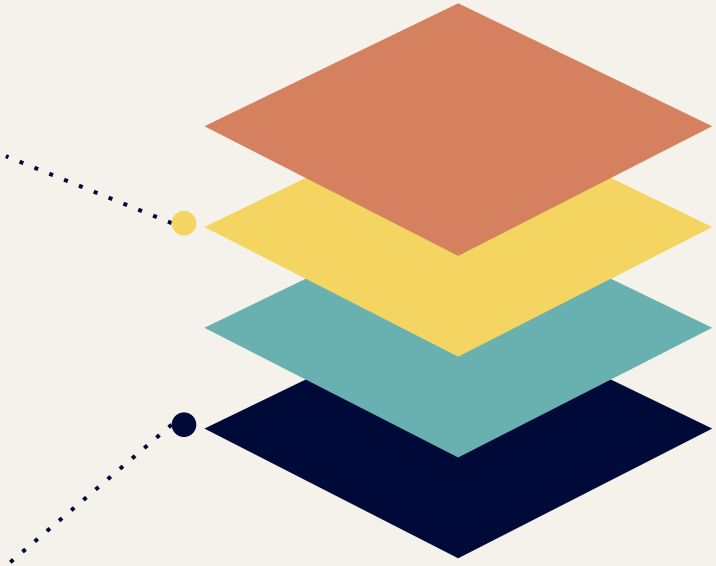
Balance Accountability & Learning

Building Blocks of Impact-Oriented M&E

- Why, who, what, how, when?
- Start small and strengthen

Prioritizing data for Impact

Define roles and tasks in M&E



Impact Value Chain/Theory of Change

Balance Accountability & Learning

Next steps

Are you clear about how and why M&E results will be used by your social enterprise?

Could you already observe impact-level results?

Do you have the capacity or readiness to implement an impact-oriented M&E?

Thank you!

Do you have any questions?

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