

SOCIAL IMPACT ASSESSMENT GUIDE



Rexel
foundation 
FOR A BETTER ENERGY FUTURE

 iM PROVE

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NOTE

While this guide can of course be printed, it is interactive and can therefore be browsed by topic with only a few clicks!

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INTRODUCTION

Most social entrepreneurs are convinced that impact assessment has positive virtues for guiding and driving strategy, making improvements, promoting the work of employees and volunteers, answering to financiers and partners, communicating effectively, etc.

Nevertheless, undertaking the assessment of one's impact is not a simple matter. Often perceived as time-consuming, costly and technical, impact assessment can be a dissuasive project for some social entrepreneurs if they receive no assistance.

For this reason, the Rexel Foundation asked (IM)PROVE to develop a readily available, **simple, illustrated methodological** guide—to assist social entrepreneurs throughout the impact assessment process—as well as **a table of key indicators to be assessed according to the social aims of the entrepreneur**: energy access, energy retrofits, promotion and funding of renewable energy sources, development of innovative materials and solutions for energy progress, raising awareness among households living in fuel poverty, and vocational training and integration.

AMÉLIE ANDRÉ,
GENERAL SECRETARY
OF THE REXEL
FOUNDATION

“While an impact assessment is often conducted at the request of financiers, as a Foundation we found it relevant to contribute to creating tools to facilitate this evaluation. Taken from (IM)PROVE’s

expertise, whose methodology has been tested and approved, this guide is a precious tool for the social enterprises using our platform. We hope that you will find it helpful.”

JEAN-JÉRÔME
CALVIER,
DEPUTY MANAGING
DIRECTOR OF ULISSE
AND MANAGER
OF THE SOLENI
DIVISION

“This impact assessment provided the opportunity to objectify and quantify the positive feedback from households and advisors that SOLENI representatives have been gathering in the field for the past three years. The strengths of the SOLENI model were clearly demonstrated: two house visits that created social ties, as well as a full personalized diagnostic carried out by a trusted third party made up of nearby, attentive professional energy advisors. At the same time,

the direct beneficiaries observed a change in their energy and water use, as well as greater control of their consumption and bills. They ultimately decided that the equipment installed was effective and felt better in their homes. All of these data are critical in retaining current customers and convincing prospects in line with a change of scale.”

MÉLANIE PONSON,
MANAGING DIRECTOR
OF (IM)PROVE:

“The purpose of (IM)PROVE is to assist social innovations in their implementation, to help them be better, be bigger, be more informative. Impact assessment is a key tool in reaching these goals. While this approach is often perceived as a cost, in reality it is an investment in the future of any socially

innovative project. Beyond the diagnostic, the assessment enables the identification of areas of improvement and innovation in order to continue to innovate and take the project one step further.”

1. WHY SHOULD I ASSESS MY IMPACT?

- Do you wish to put your strategy into perspective?
- Do you wish to better know your beneficiaries?
- Do you want to compare the relative relevancy of different products, services and actions in order make choices?
- Or understand the specificity of a geographical area where you operate?
- Do your partners challenge you regarding your results and the relevance of your actions?
- Or do you wish to perpetuate your partnerships by proving the added value of your service?
- Do you need to establish a transparent dialogue with your partners?

- Do you want to consider social impact as a criteria for strategic decision, in other words make it a strategy management tool?
- Do you need to communicate more efficiently about your actions?
- Do you want to value your employees /volunteers' work to strengthen their commitment to the project?

Did you just check more than 3 boxes? If yes, it means you need to assess your impact. Follow this guide then!

BEYOND THE FIGURES, HERE ARE SOME SOCIAL IMPACT ASSESSMENT OUTPUTS:

Social entrepreneurs claim that impact assessment helped them:

Question and improve their social strategy	88 %	
Monitor their social impact in the long term	71 %	
Legitimize their action, provide proof of concept	79 %	
Facilitate cooperation and co-creation	79 %	
Adapt their offer, their marketing strategy	75 %	

Survey conducted among social entrepreneurs supported by (IM)PROVE

2. PREREQUISITES FOR ASSESSING SOCIAL IMPACT

What does social impact mean?

Organizations and projects designed for achieving social goals pursue a social mission. To fulfil this mission, they set up a strategy and an action plan. Social impact consists in all the positive or negative, expected or

unexpected, long term changes, which are generated by, and therefore attributed to, the implemented activities. Impacts may be of environmental, economic or social nature.

DIFFERENTIATING PERFORMANCE, RESULTS AND IMPACT.

Performance

is characterized by achievement or performance indicators such as the amount of people reached, the number of products / services sold, the satisfaction rate... these are mostly quantitative data that does not generally give any information about changes that may be triggered.

Result

refers to the evolution that can be observed regarding the situation of any stakeholder such as beneficiaries, partners, customers, and more broadly the environment.

Impacts

are the precise effects of your action, that is to say the results minus what would have happened anyway, without your intervention.

Solar lamps distribution

- × **SOCIAL MISSION**
improve life quality in developing countries
- × **STRATEGY**
promote access to clean and affordable energy
- × **ACTION PLAN**
sell solar lamps
- × **PERFORMANCE**
number of lamps sold and people reached
- × **RESULT**
better lighting, improved economic situation, health and children education
- × **IMPACT**
Improved economic situation = reduction of energy costs minus what is due to the falling of fuel prices or the evolution of household size

What does social impact assessment mean?

- × It means having an hypothesis: “the activity has some impacts of a certain nature on certain stakeholders”;
- × Setting up indicators to assess these impacts;
- × Then, analysing quantitative and qualitative collected data;
- × And finally concluding about the assumptions, whether the objectives are reached or not and potentially demonstrating unintended impacts.

ONE MAY WANT TO ASSESS THE IMPACT OF A PROJECT:

Ex-ante

before launching an activity, in order to develop assessment tools, set concrete objectives and assess its impact from day 1 or so as to theoretically estimate the unintended impacts;

Ex-post

after the intervention is completed, to validate objectives achievement;

Continuously or through on-going evaluation

(longitudinal studies) to drive social impact the same way organisations drive financial performance throughout the year.



IMPACT ASSESSMENT

does NOT measure the relevancy of the project objectives as regards the beneficiaries or societal needs. It does not allow to evaluate the efficiency of a project either (e.g. the consistency between objectives and invested resources).



SOCIAL IMPACT ASSESSMENT APPROACH

(as presented in this guide) is adaptable to any type of organization (business model, sector...). Regarding the business model, the only difference will concern the source of funds that finance the project (not considered for an impact assessment without monetization, important for the calculation of a social return on investment or a cost-benefit analysis) or the financial contribution of the beneficiaries (and therefore on some impacts such as the economic situation, dependence...).

Assessment methods



Focus on the cost-benefit approach

If it is required to measure economic added value, it is possible to do so using the cost-benefit approach. It consists in comparing the cost of the solution to the generated revenues or avoided costs. This allows calculating a financial return on investment.

This methodology requires to take a number of steps that are similar to the ones described in this guide (particularly the impacts mapping one), to select only the financial impacts, develop scenarios, translate them into a model and conclude on the economic profitability of the service or product.

To view the results of this approach, take a look at the McKinsey study for the Ashoka's Social Entrepreneurs.

There are many different methodologies to assess social performance or social impact. Many of them have been listed by the Trasi Foundation Center ¹.

(IM)PROVE's approach (i-Cube methodology, that stands for "Immersion & Impact Improvement") is inspired by the SROI (Social Return On Investment).

It consists in:

- 1 A concerted effort;
- 2 Leading to a not monetized impact;
- 3 Which includes the selection of both quantitative and qualitative indicators of social, economic and environmental nature, adapted to the organization and its specific context;
- 4 And impact data collection through field surveys.

Both change and its attribution to the studied solution should be measured to assess impact.

1 Change can be assessed (in descending order of accuracy) via

PRE-POST STUDY

data is collected twice, before the intervention takes place (baseline situation) and after it is finished. The comparison between the two situations will allow to assess change;

EX-POST OR RETROSPECTIVE STUDY

Interviewing the targets about their perception of the situation evolution, once the intervention is over.

2 Attribution can be assessed thanks to (in descending order of accuracy) via

THE RANDOMIZATION TECHNIQUE ²

Randomly selecting, within the targeted population, the individuals who will be receiving the service / product and the ones who won't. This allows having two comparable groups and determine precisely, thanks to the control group, what happens to the targeted population without intervention;

THE MATCHING TECHNIQUE

Forming pairs of individuals (one target individual, one control individual) with similar characteristics and comparing their respective evolution;

CONSTITUTING A CONTROL GROUP

retrospectively (making it comparable, in average, according to certain characteristics, with the target group);

INTERVIEWING TARGETS

on their perception of these changes' attribution.

3 Technically, it is unfortunately not always possible to have a baseline or form a control group.

4 Carrying out an impact assessment too shortly after an action is enforced can be limiting in terms of rigor (impossibility to assess long term impacts and impact sustainability).

1 - <http://trasi.foundationcenter.org/browse.php>

2 - Random Control Trial is a costly method rarely adapted to the needs of medium size social enterprises

3. HOW TO ASSESS MY IMPACT?

Here are the 8 impact assessment steps which will be detailed in the next chapters.



1 Impact assessment framing

- × What?
- × For whom?
- × Why?
- × How?



2 Stakeholders mapping

- × Who are my organization's stakeholders?
- × Which ones to study?
- × Which ones to involve?



3 Social mission formalization

- × What is my social mission?
- × Who are my targets?
- × What are the issues?
- × What are my key activities?



Social impacts mapping

- × What are the expected impacts of my action?
- × Which unexpected impacts have been observed?
- × Which reasonable scope for an impact study?



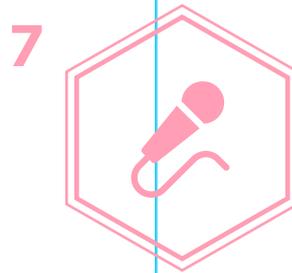
Indicators definition

- × How to access the mapped impacts?



Methodology formalization

- × How to evaluate change?
- × How to evaluate change attribution?
- × How to interview?
- × Who to interview?
- × Who should be interviewed?
- × When?



Data collecting

- × How to size the sample population?
- × Which tool to use to create a questionnaire?



Analysis and data presentation

- × How to analyse?
- × How to present the study results?



For each step, you will find the following sections:

WHAT IS IT ABOUT?

Some theoretical concepts on the step in question.

(IM)PROVE'S ADVICE:

Best practices and helpful tips to achieve the step.

YOUR TURN!

Tools and items to put theory into practice.

ILLUSTRATION

A concrete example taken from a social impact assessment study.

3.1

Impact assessment framing



1 WHAT IS IT ABOUT?

Before embarking on an impact evaluation, one should think about the objectives, the target and the means,

and have a look at 3 key concepts: relevancy, feasibility and transparency.

Relevancy

the objectives should be specified and aligned with the organization's context, its needs and challenges. It is therefore necessary to identify the purpose of the evaluation (why? For whom?) and to clarify the questions it should answers to.

Transparency

Whatever your choices are, you must specify and clearly announce to the stakeholders, or future report readers, the nature, scope, purpose and limitations of the assessment and evaluation process.

This step aims at defining the scope of the impact assessment (geography, activities, stakeholders...).

Feasibility

you must ensure at all costs that

- × You are not limited in terms of financial or time resources
 - Think about turning to your financial partners to support you in financing the study
 - Be prepared to a quite heavy workload at the beginning and the end of the mission! Make sure the timing of the evaluation fits with your schedule.
- × The timing is appropriate: Make sure you have any important deadlines in mind (annual report, fundraising...) and that the timing for data collection is suitable (availability of interviewees and interviewers).
- × You have identified technical constraints: Can all the listed impacts be assessed? Can all the interviewees be interviewed?



2

(IM)PROVE'S
ADVICE

Before you start

- × Make sure your employees and stakeholders are on board: help them understand the importance of assessing impact, reassure them regarding the fact that this exercise is not meant to control their work but to improve the organisation itself, and finally, involve them.
- × Do not measure everything all at once: start small but with qualitative data, and go further the following years.
- × Develop a culture of sharing and collaborating internally and externally: share your feedback and feel free to solicit those who have already embarked on the

assessment adventure.

- × Base the impact assessment process on the existing processes (satisfaction surveys, operational process ...).
- × Run a small survey among your employees, volunteers, beneficiaries and other relevant stakeholders regarding the **perceived effects and changes** caused by your action, strengths and areas for improvement of your business. That will help you frame the evaluation.



YOUR
TURN!

Circle the answers
that fit your situation

	● Targeted	▲ Exploratory	■ Complete
(What for?) Impact assessment should allow me to...	<input type="checkbox"/> Check the level of achievement of my organisation's 5 main targeted impacts	<input type="checkbox"/> Understand the change mechanisms concerning one or two types of stakeholders	<input type="checkbox"/> Study in detail any positive/negative changes desired or not related to my business
(What?) I would primarily like to...	<input type="checkbox"/> Have some reliable key figures to convince funders, prove my impact and communicate	<input type="checkbox"/> Understand my impact to improve my offer / my strategy / my model	<input type="checkbox"/> Have detailed statistics to prove and improve my impact
(Who?) I intend to communicate the results...	<input type="checkbox"/> Internally, to the stakeholders (including funders), and to the general public	<input type="checkbox"/> Only internally	<input type="checkbox"/> Internally, to the stakeholders (including funders) and also to the general public
(How?) Which resources can I invest in this study (HR, budget...)	<input type="checkbox"/> €	<input type="checkbox"/> €€	<input type="checkbox"/> €€€

YOUR RESULTS:

●
 ▲
 ■

Depending on the number of ● ▲ ■ you circled, this is the impact assessment we advise you to run:

	● Targeted	▲ Exploratory	■ Complete
Number of studied impacts	Limited	Large	Large
Impacts' nature	Direct	Direct and indirect	Direct and indirect
Number of involved stakeholders	Limited	Limited	Large
Reliability of the results	High	Medium	High
External support	Recommended	Not necessarily	Recommended
Framing workload (step 1 to 6)	+	++	+++
Data collection workload	++ (short and closed questionnaires – a large number of interviewees)	++ (long and opened questionnaires – not so many people interviewed)	+++ (long and opened questionnaires – a large number of interviewees)
Analysis workload	+ (lots of questionnaires but not too long an analysis)	++ (qualitative data reprocessing but just a few questionnaires)	+++ (qualitative data reprocessing and lots of questionnaires)
Restitution workload	++ (concision and presentation effort)	+ (not so much concision and presentation effort needed)	+++ (a lot of information to sum up and presentation effort)



**ILLUS-
TRATION**

Throughout the guide, SOLENI's example will be developed to illustrate the concepts presented. SOLENI is an activity enforced by the work integration social enterprise Ulisse, based in Grenoble.

SOLENI offers a socio-technical support to households suffering from fuel poverty (who cannot afford to keep adequately warm at reasonable cost) to help them better manage their water and energy consumption. After an initial diagnosis, SOLENI intervenes a second

time within the household to implement appropriate solutions (small insulation works and energy efficient equipment installation) and to pass on basic knowledge related to fluid consumption. SOLENI's particularity is to fight a double battle against energy poverty and for work integration opening energy councillors' positions to people with limited access to employment.

Mission type targeted

(What for?) Impact assessment should allow me to...	<ul style="list-style-type: none"> × Estimate the level of achievement of the main desired impacts that define SOLENI's social mission, × Understand the households behaviour change mechanisms, × Identify service improvement axes.
(What?) I would primarily like to ...	<ul style="list-style-type: none"> × Assess the real and perceived impacts for fuel poverty households, × Understand the mechanisms of change in family behaviour, × Have access to a few reliable key figures to prove the impact of the solution, convince customers and communicate.
(Who?) I intend to communicate the results...	Internally and externally, in order to prove the efficiency of the service to the beneficiaries, partners and customers.
(How?) Which resources can I invest in this study (HR, budget...)	Intervention of a team of 3 people in immersion for 1.5 months in the organisation. Internal coordination by the deputy director of Ulisse, in charge of developing SOLENI.
Impacts nature	Direct (economic, comfort and well-being, health, social ties, knowledge development) - 15 impact dimensions retained.
Number of stakeholders involved	5 (clients, prescribers, funders, direct beneficiaries, reintegrated employees).
Reliability of the results	Important.
External support	Yes, (IM)PROVE.
Workload due to the framing (steps 1 to 6)	Experts interview, key stakeholders interview, bibliographic research.

3.2

Stakeholders mapping



1

WHAT IS IT ABOUT?

Your stakeholders are key players of the impact assessment and need to be involved from the beginning, either individually (via interviews and discussions about their expectations) or collectively by setting up a Steering Committee constituted by the key stakeholders.

Therefore it is important to have an overall view of your stakeholders before choosing those who will be part of your scope: the stakeholders you want to study your impact on, and those you want to get involved in the impact assessment project. Some stakeholders may be both studied and involved.



2

(IM)PROVE'S ADVICE

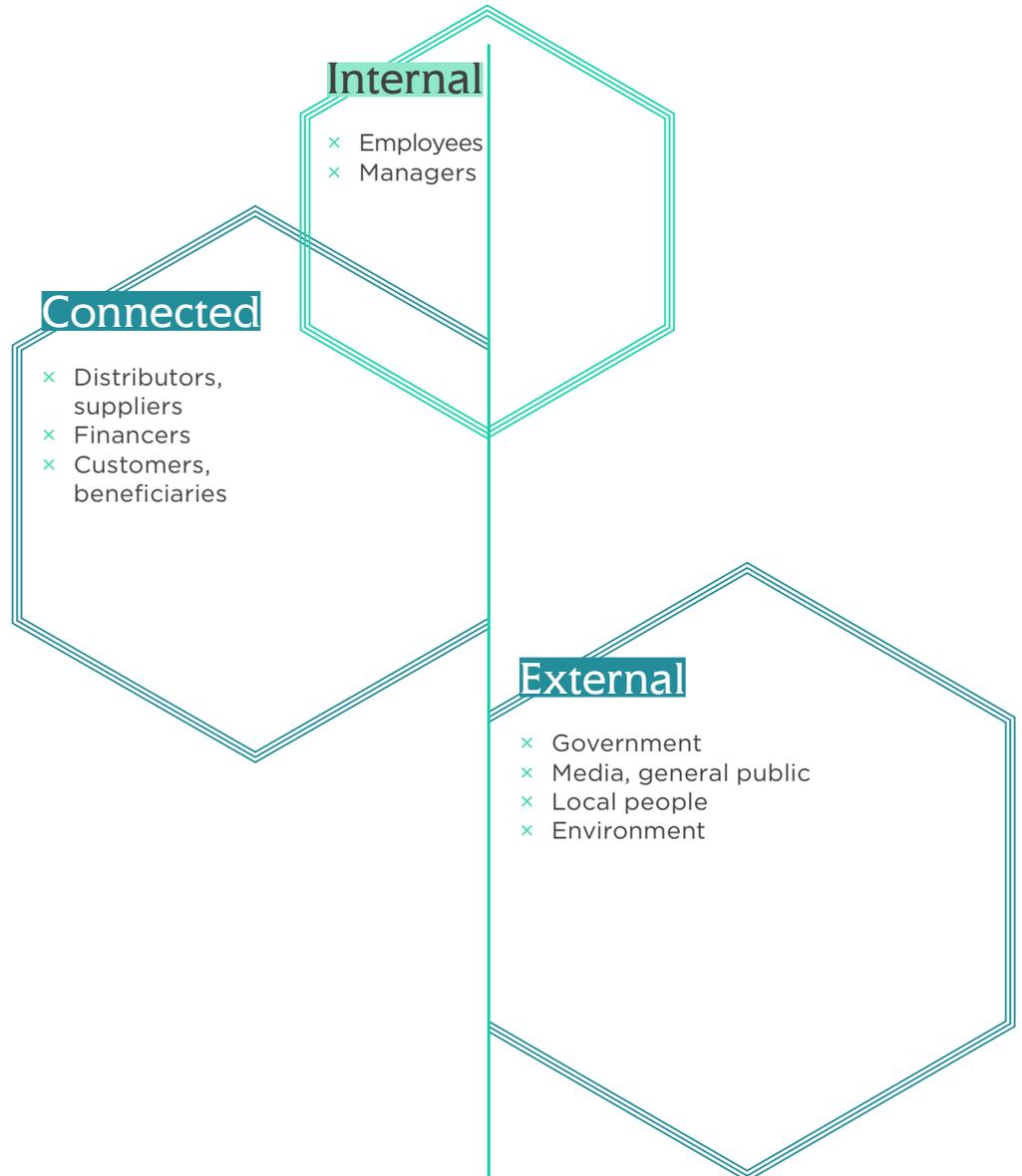
The impact assessment scope is generally limited to the stakeholders that are at the heart of your social mission and are heavily impacted positively or negatively by your business.



**YOUR
TURN!**

1

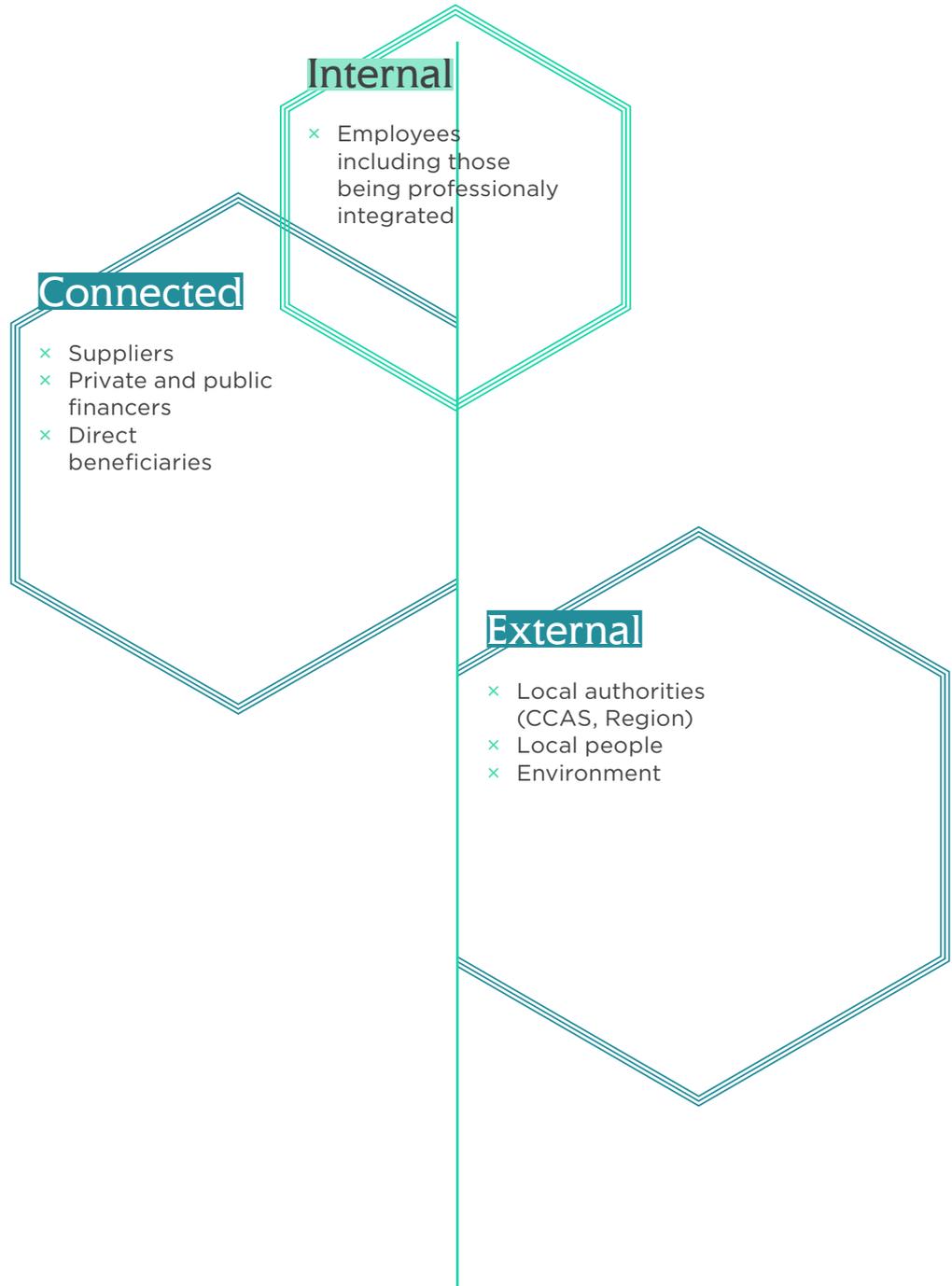
With the model below, start by listing exhaustively
your organization's stakeholders.





**ILLUS-
TRATION**

The perimeter of the stakeholders studied and involved in SOLENI's mission:



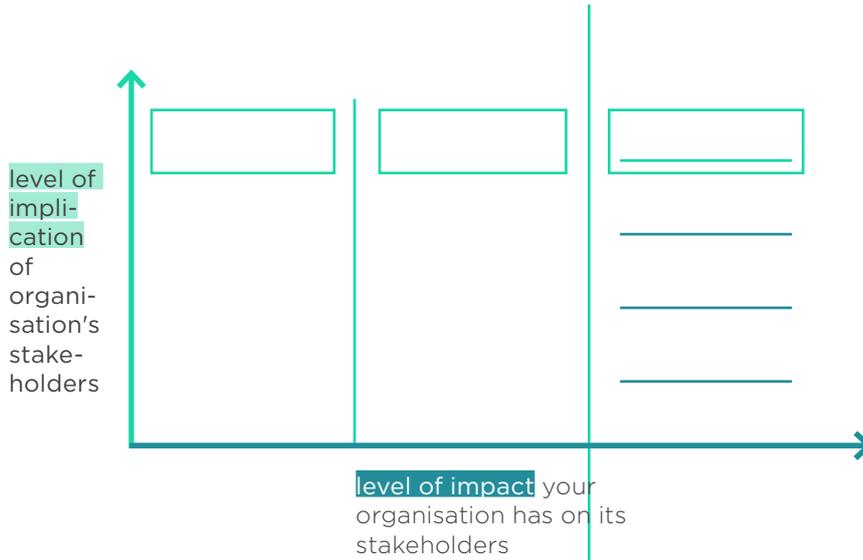


YOUR TURN!

2

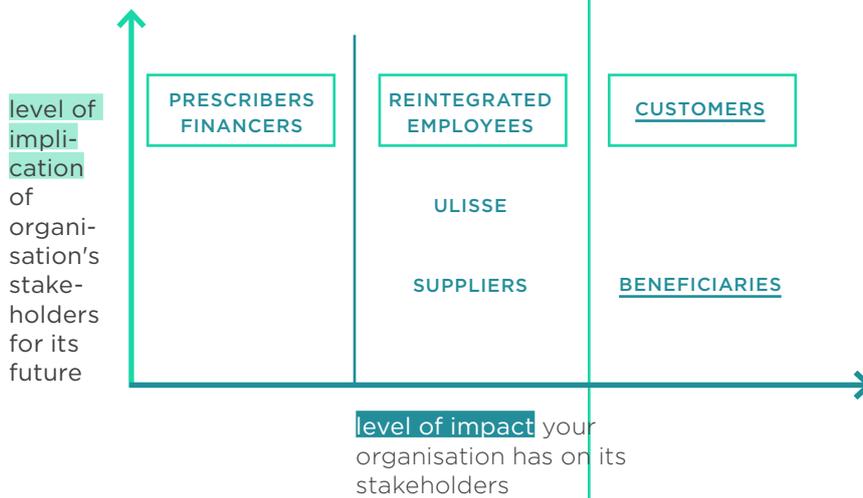
Then, in a second time, estimate:

- × Which ones are the most **impacted** by the project and therefore deserve to be studied,
- × Which ones are the most **involved** in the project and deserve to be **included** in impact assessment process.



ILLUSTRATION

Case study Ulisse Énergie SOLENI



3.3

Social mission formalization



1

WHAT IS IT ABOUT?

When assessing your impact, you must take into account the social context, the sector overall issue and the organization's social mission since the exercise's main purpose is **to check if the structure achieves its objectives.** Incidentally, stakeholders' scope may

also be reviewed doing so.

Nota Bene: however, the impact assessment's goal is not to verify the relevance of the answer provided to a need or social issue.



Formalize your social mission following two steps:

1 Please specify below the social issue your organization tackles.

2 In this context, now specify your project's precise social mission, the main identified challenges and the implemented activities that address these challenges.



YOUR TURN!

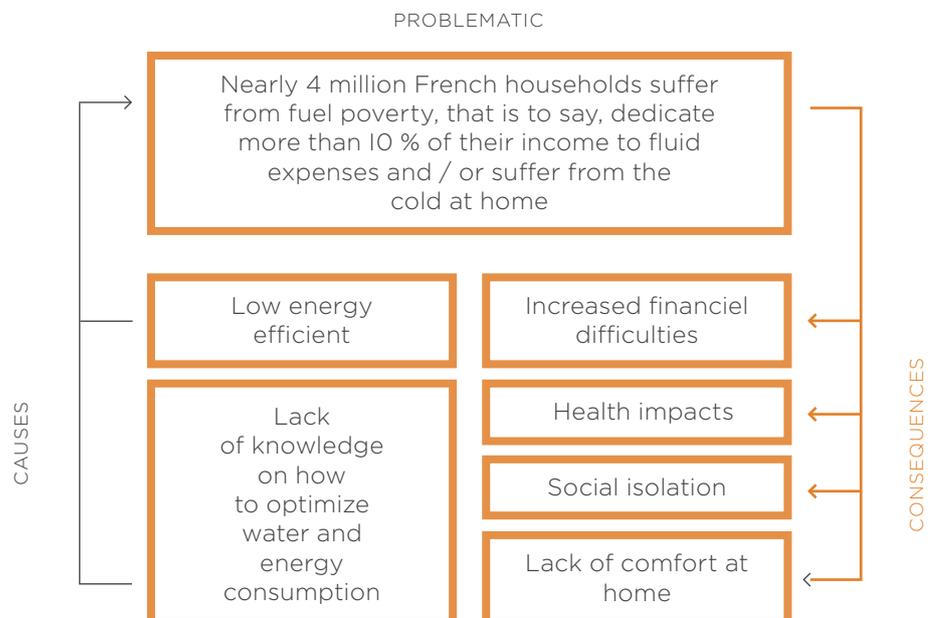
1

Your social issue



ILLUS-TRATION

The fuel poverty issue

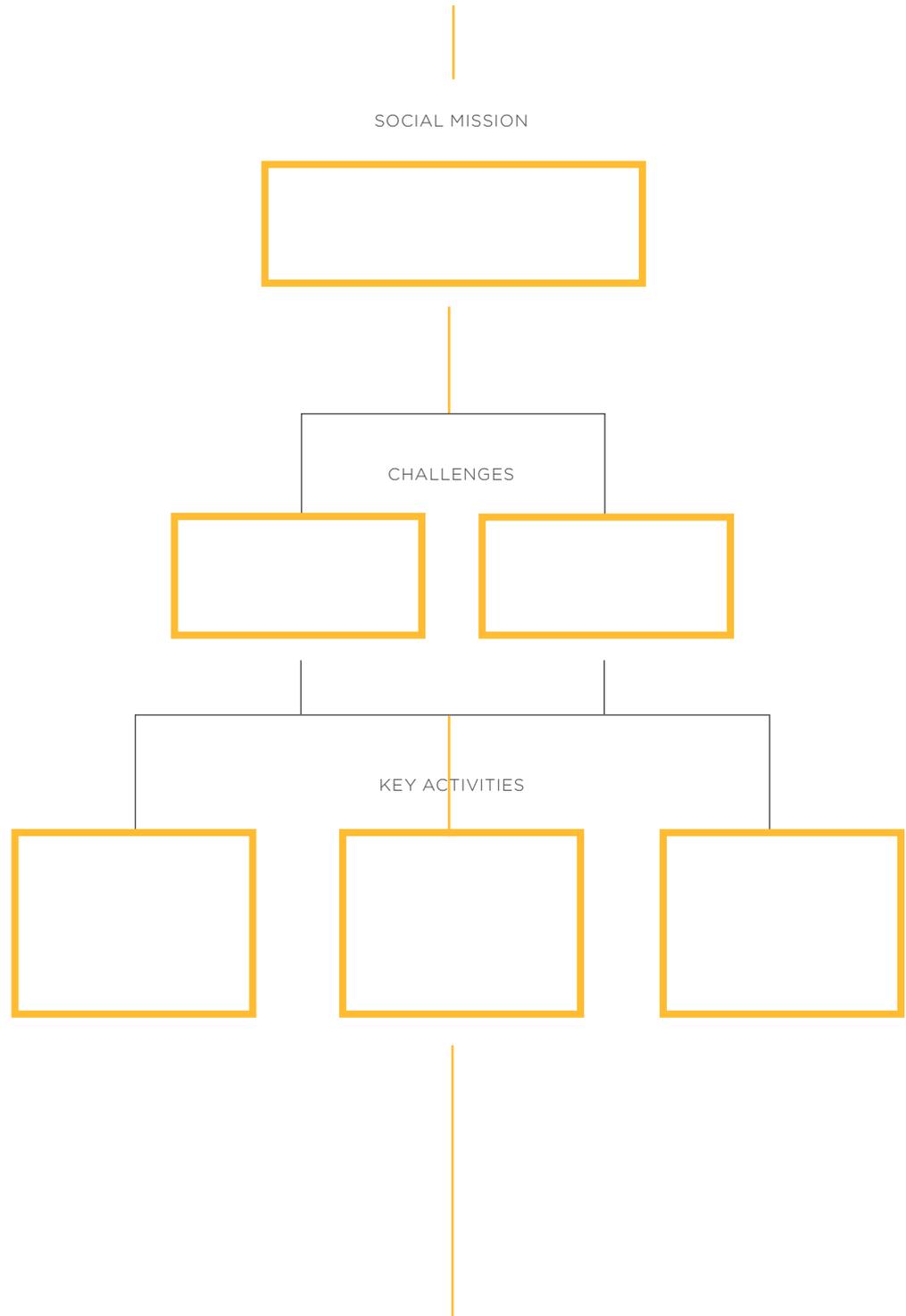




YOUR TURN!

2

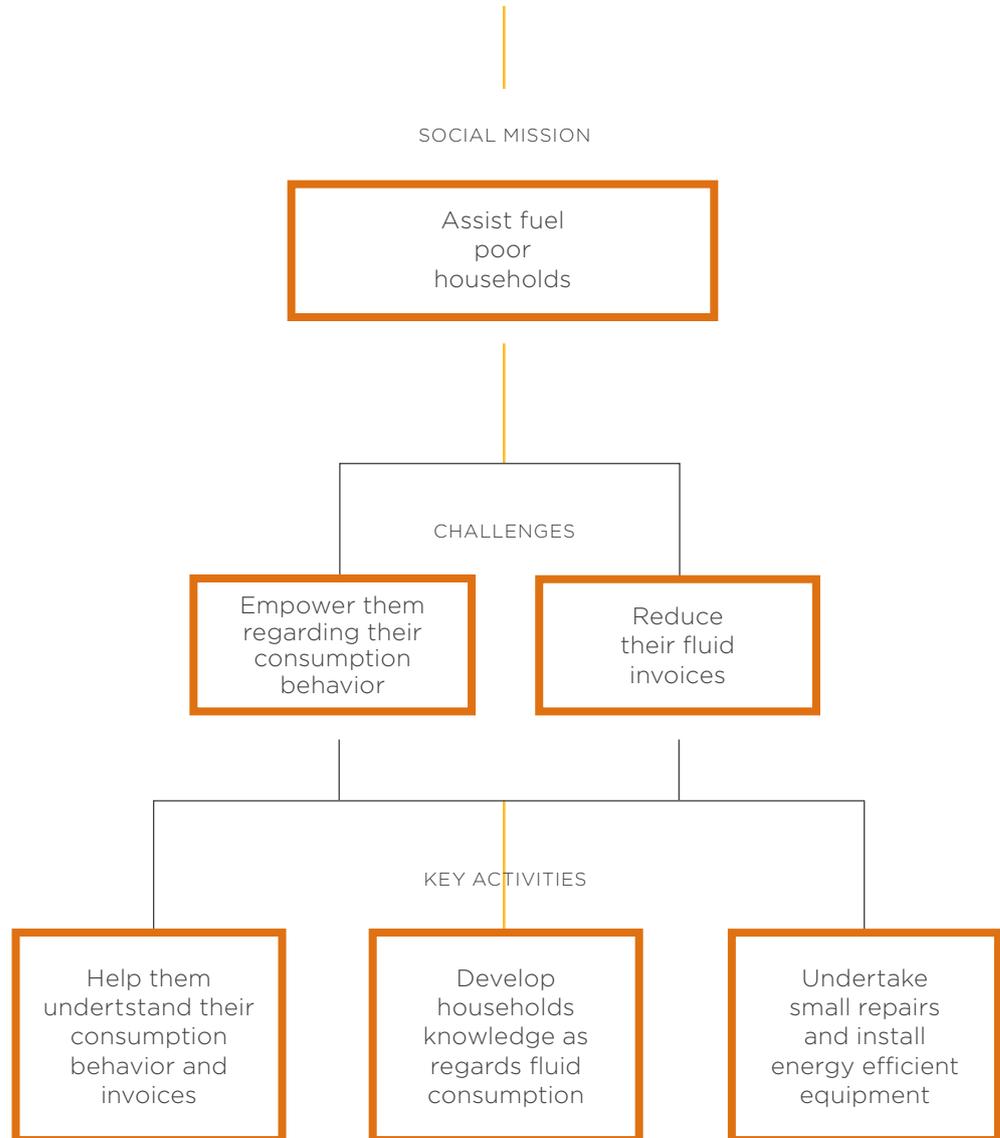
Your social mission





**ILLUS-
TRATION**

SOLENI's social mission



3.4

Mapping social impacts



1

WHAT IS IT ABOUT?

Mapping social impacts consists in (1) setting up an exhaustive list of expected and unexpected impacts and (2) prioritizing them in order to set up a realistic and relevant scope.

STEP 1 Exhaustively listing impacts

Having the organisation's social mission, issues and key activities previously formalized, it is relatively easy to list the organisation's targeted impacts. It is however more complex to exhaustively list the unintended impacts. At this stage involving stakeholders is particularly useful since each actor, from his point of view, can witness different kinds of changes at different levels. Enriching these feedbacks by reading published studies and getting **field experts'** advice can also be helpful!

STEP 2 Formalizing the impacts in an impact map

This map must at least contain the following information: stakeholder, impact nature, impact, indicator, source of information (see illustration).

STEP 3 Reducing the scope of the study

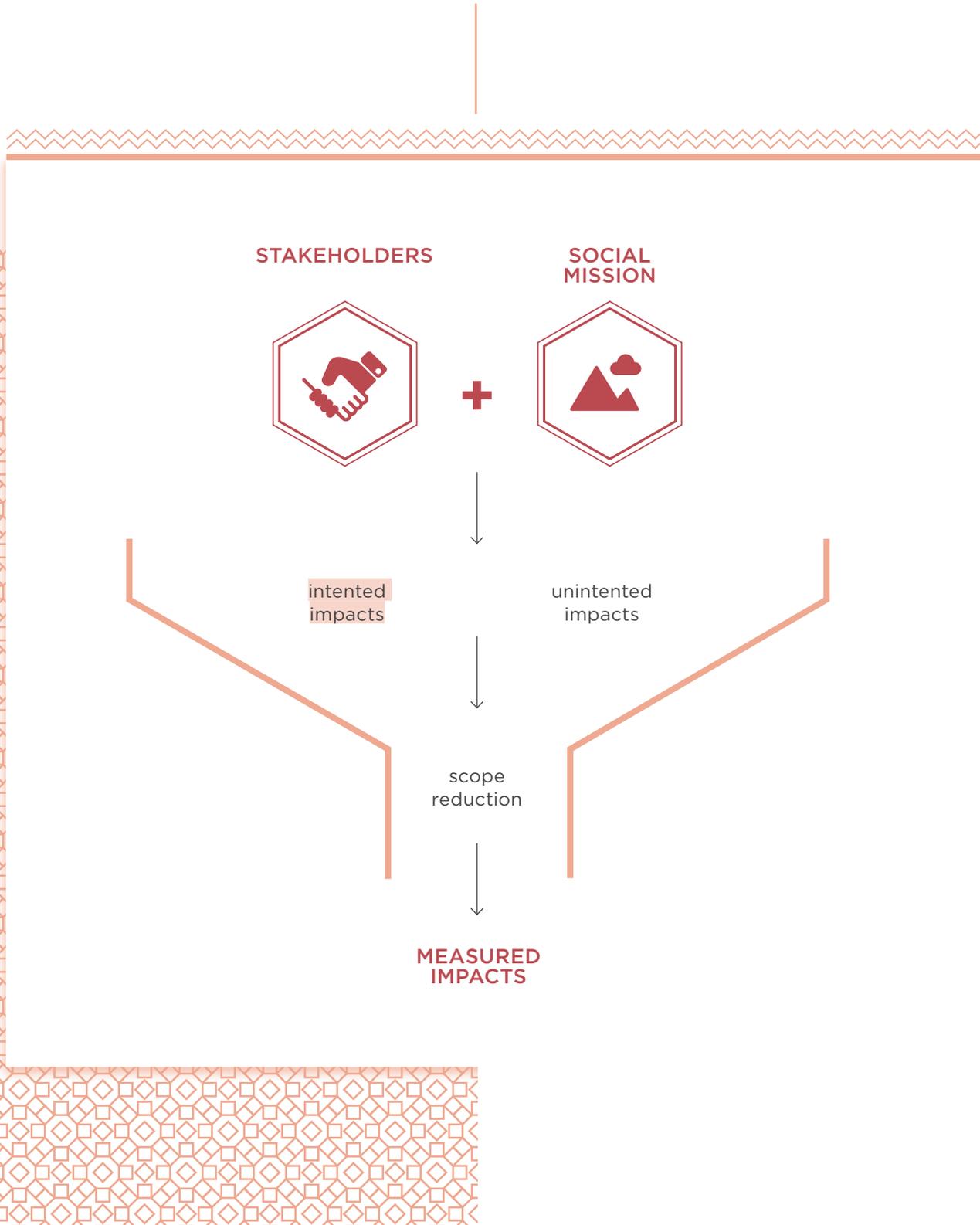
It is important to reduce the scope of studied impacts to simplify the following steps: i.e. data collection and analysis.



2

**(IM)PROVE'S
ADVICE**

- ✗ Involve stakeholders in the definition and prioritization of impacts
- ✗ Only measure what is relevant and valuable for your organization! It is preferable to start small and enrich the process over the years.





YOUR TURN!

1

Exhaustively listing impacts

THE DICTIONARY OF INDICATORS

To help you through this task, we have listed in a dictionary the main impacts that you could wish to measure if you work in the energy sector.

This dictionary is designed for stakeholders involved in promoting access to energy and energy efficiency. It contains performance indicators and impact indicators organized by themes of intervention: access to energy, energy retrofit, training, awareness, etc.

THE INTERVIEW GUIDE FOR STAKEHOLDERS

Stakeholders in your organization are relevant targets when it comes to defining impact assessment objectives, its perimeter and the expected impacts the study should focus on. Here is a series of questions you may use to build your interview guide in order not to miss any issue on D-Day.

>> see dictionary
(only available in
French so far)

THE INTERVIEW GUIDE FOR STAKEHOLDERS

- 1 Presentation of the study: context, objectives, evaluation questions...
- 2 Your expectations regarding impact measurement
 - × What are your expectations concerning this study?
 - × What do you think of the main objectives that were presented to you? Do you see more to add?
 - × Have you ever conducted such studies? What sort of information / figures or specific results do you expect from it?
 - × What use would you make of this study? How can it help you?
- 3 Your contribution to the studied activity: what is your contribution to the studied activity?
- 4 In your opinion what are the social impacts this activity has...
 - × On you?
 - × On other stakeholders?
 - × How could we measure them?



**ILLUS-
TRATION**

Case study Ulisse Énergie SOLENI

Stakeholders	Intended/ unintended changes	Results		
		Impacts	Nature	
Who do you have an effect on?	What do you think will change for people impacted by your activity?	How would you describe the change?	What kind of impact is it?	
Households suffering from energy poverty	Satisfaction	SOLENI fulfilled beneficiaries expectations	Direct/ Quali	
	Increased knowledge regarding energy consumption	<ul style="list-style-type: none"> × Better understanding of energy bills × Less frequent conflicts with energy suppliers and lessors 		
	Behaviour change regarding energy consumption	<ul style="list-style-type: none"> × Improved energy efficiency of the house × Adoption of an energy efficient behaviour in the family 	Direct/ Quali	
	Comfort and living conditions improvement	<ul style="list-style-type: none"> × Cold; in-house temperature/ draught / humidity / mould / ventilation × Feeling secure at home 	Direct/ Quali	
	Household financial situation improvement		<ul style="list-style-type: none"> × SAVINGS × Exiting energy poverty 	Direct/ Quanti
			<ul style="list-style-type: none"> × Greater financial autonomy: less allowances requested to NGO and public authorities × Use of savings 	Indirect/ Quali
	Hygiene and health improvement		<ul style="list-style-type: none"> × Health condition × Children's health condition 	Indirect/ Quali
	Well being at home		<ul style="list-style-type: none"> × General judgement of the house × House reappropriation 	Direct/ Quali



YOUR TURN!

2

Reducing the scope of the study

6 QUESTIONS TO PRIORITIZE AND REDUCE YOUR SCOPE:

- Q.1 Is this impact in the heart of the social mission?
- Q.2 Is it a direct or indirect impact?
- Q.3 Is this impact mainly due to the action of the organization?
- Q.4 Is the impact easy to measure (simple and reliable indicator)?
- Q.5 What is the expected timeframe in which this impact should materialise? Is it possible to collect data at this moment?
- Q.6 How many stakeholders are interested in the evaluation and quantification of this impact?

Take your impact map and for each listed impact, ask yourself the 6 previous questions, prioritize and select impacts based on the answers to these questions and reduce the scope to the desired size.

Impact	Q.1	Q.2	Q.3	Q.4	Q.5	Q.6	Conclusion



ILLUS-TRATION

Reducing the scope of studied impacts of SOLENI’s action

Impact	Q.1	Q.2	Q.3	Q.4	Q.5	Q.6	Conclusion
Time dedicated to homework	No	Direct	No	Quite easy	Short	8 out of 10	Included, since it is direct and because attribution can be assessed thanks to qualitative questions
Academic success	No	Indirect	No	Easy	Long	8 out of 10	Excluded, since it is an indirect impact which attribution is difficult to measure

THE CORRELATION BETWEEN FUEL POVERTY AND ACADEMIC SUCCESS

Some studies report the negative impact fuel poverty has on domestic comfort and, consequently, on time children spend doing their homework

However, should we measure the impact of SOLENI’s action on beneficiaries’ children school results?

- × Education is not at the heart of SOLENI’s social mission.
- × The increased time spent on homework is an indirect impact of SOLENI’s intervention.
- × Many things can impact time spent on homework (family’s implication in children education, children’s dedication to school) or academic success (teacher quality). Moreover, the causal link appears valid in cases of severe fuel poverty, cases in which SOLENI’s intervention is certainly not sufficient.
- × Estimating time spent doing homework is rather difficult for the children and their parents.

- × It is likely that the impact on time dedicated to homework would appear in the medium term, and could therefore be studied in terms of timeframe.
- × None of the respondents mentioned education as an important issue regarding fight against fuel poverty.

Conclusion: Since it is not directly linked with SOLENI’s social mission and also because it is difficult to assess, academic success has been excluded from SOLENI’s impact map.

3.5

Defining measurement indicators



1

WHAT IS IT ABOUT?

A set of indicators must be relevant, comprehensive and realist. The unique and synthetic indicator does not exist. Therefore, it is necessary to develop a multi-criteria approach that will guaranty exhaustiveness and accuracy.

There are different types of indicators:

Characterization indicators
(age, gender, occupation...)

Performance indicators
(number of people reached, number of products sold, satisfaction rate...)

Impact indicators,
which can be of different nature (quantitative/qualitative, direct/indirect)

It is preferable to use tried and tested indicators (taken from former studies or scientific publications). This helps ensuring the accuracy, reliability and legitimacy of the measure.

Choosing indicators, one should also take into account the way data will be collected (web administration, telephone, face-to-face...).



2

(IM)PROVE'S
ADVICE

In order to find such indicators, you can consult the following websites:

IRIS >> iris.thegiin.org

IPIP >> ipip.ori.org/newIndexofScaleLabels.htm

Global Value Exchange >> globalvaluexchange.org

Standard tool: Outcome star >> outcomesstar.org.uk

and of course the indicators ascertained in the dictionary >> [see dictionary \(only available in French so far\)](#)



YOUR
TURN!

- 1 **Take** your impact map and choose an indicator to measure each of the selected impacts
- 2 **Characterize** your indicators (characterization, performance, impact)
- 3 **Enrich** your map with comments on the possible source of the data and clarification in terms of future data interpretation (thresholds, correlation with another impact...)



**ILLUS-
TRATION**

Case Study Ulisse Énergie SOLENI

Intended / unintended Changes	Impacts
	HOW WOULD YOU DESCRIBE THE CHANGE?
WHAT DO YOU THINK WILL CHANGE FOR PEOPLE IMPACTED BY YOUR ACTIVITY?	HOW WOULD YOU DESCRIBE THE CHANGE?
Satisfaction	SOLENI fulfilled beneficiaries expectations
Increased knowledge regarding energy consumption	<ul style="list-style-type: none"> × Better understanding of energy bills × Less frequent conflicts with energy suppliers and lessors
	<ul style="list-style-type: none"> × Improved energy efficiency of the house × Adoption of an energy efficient behaviour in the family
Behaviour change regarding energy consumption	<ul style="list-style-type: none"> × Cold; in-house temperature / draught / humidity / mould / ventilation × Feeling secure at home
	<ul style="list-style-type: none"> × Savings × Exiting energy poverty × Greater financial autonomy: less allowances requested to NGO and public authorities × Use of savings
Comfort and living conditions improvement	<ul style="list-style-type: none"> × Health condition × Children's health condition
	<ul style="list-style-type: none"> × General judgement of the house × House reappropriation
Household financial situation improvement	
Hygiene and health improvement	
Well being at home	

Results	
Indicators	Source
HOW WOULD YOU MEASURE IT?	WHERE DID YOU GET THE INFORMATION FROM?
Satisfaction: Strongly satisfied/ satisfied/ unsatisfied/ Strongly unsatisfied	Quest. to families
Self-assessment of the level of understanding of energy bills and fluid expenses	Quest. to families
<ul style="list-style-type: none"> × Feeling preoccupied by energy consumption? × Number of requests to suppliers / lessors 	Quest. to lessors, suppliers, local authorities
Satisfaction regarding comfort works	Quest. to families
Number of enforced pieces of advice, number piece of equipment installed and maintained	
Evolution of comfort and in-house temperature / draught / humidity / mould / ventilation...	Quest. to families
Evolution of security perception for adults and children	
Energy consumption evolution (real and perceived)	Quest. to families, lessors, suppliers, local authorities
Percentage of revenues dedicated to fluid bills	Quest. to lessors, suppliers, local authorities
Evolution of granted allowance	Quest. local authorities
Cost items to which savings where allocated	Quest. to families
Number symptoms due to energy poverty and evolution	Quest. to families Former studies
Children's health evolution	Quest. to families
Well being at home, greater social interactions, new activities	Quest. to families
Decoration, arrangement	

3.6

Formalizing the methodology



1 WHAT IS IT ABOUT?

In practice, the evaluation method (see previous section: [Assessment methods](#)) will be discussed and considered from step 1 to 6. However, it is hard to decide

on the final methodology long before having designed the impact map. At this stage, the aim is to specify:

- 1 **How to evaluate change**
pre-post or ex-post studies?
And in the case of a pre-post analysis, define when exactly should data be collected (One year before, one year after and 5 years after for example).

- 2 **How to assess change attribution**
setting up a control group or not

- 3 **The method for data collection**
(face-to-face interviews, telephone interviews, paper form or online questionnaire) - or without data collection (information feedback via SI)
 - × Paper survey is particularly useful in case respondents have limited access to the Internet or are not comfortable with these tools. It generates however an important workload in terms of afterwards processing.
 - × Online questionnaire is by far the fastest way to collect data but can introduce a selection bias and response rate are generally quite low.
 - × Phone or face-to-face interviews are ideal to ensure good understanding of the questions asked, but are time consuming.

- 4 **Sample size**
depends on the three following factors: the size of the targeted population (total population reached by the program or activity), the expected level of statistical rigor, and the time available for data collection.

- 5 **The person responsible for data collection**



**YOUR
TURN!**

The measurement method

CHANGE ASSESSMENT METHOD

- Pre-post
- Ex-post

ATTRIBUTION ASSESSMENT METHOD

- Control group
- No control group

SIZE OF THE TARGET POPULATION

.....

% OF THE TARGET POPULATION TO BE INTERVIEWED

.....

PERSON RESPONSIBLE FOR DATA COLLECTION

.....

DATA COLLECTION METHOD

- Online survey
- Paper survey
- Telephone interview
- Face-to-face interview

- Other:

Sample size:

With this online calculator you can determine the optimal size of your sample:

[>> calculator](#)



**ILLUS-
TRATION**

SOLENI's measurement method

CHANGE ASSESSMENT METHOD

- Before-after
- Ex-post

ATTRIBUTION ASSESSMENT METHOD

- Control group
- No control group

SIZE OF THE TARGET POPULATION

159 households who benefited from SOLENI's help from June 2011 to December 2013.

% OF THE TARGET POPULATION TO BE INTERVIEWED

100% in order to ensure a good amount of collected data, even if response rate is low.

PERSON RESPONSIBLE FOR DATA COLLECTION

(IM)PROVE

DATA COLLECTION METHOD

- Online survey
- Paper survey
- Telephone interview
- Face to face interview

- Other:

3.7

Data collection



1

WHAT IS IT ABOUT?

STEP 1 Designing the survey

Once the impact map is created and indicators are specified, the questionnaire can be easily created.

STEP 2 Setting up a sample

The size of your sample will depend on several factors:

- 1 The **size** of your target population
- 2 The **level** of statistical rigor you expect
- 3 The available **time** for data collection

STEP 3 Collecting data

If you intend to interview only a portion of the target population (50% of instance), a few steps are to be followed:

- 1 **Randomly select** 50% of the respondents
- 2 If you have some information regarding respondents before they are interviewed, **check the sample is representative** of the target population (e.g. gender representation, age, location...)
- 3 **Administer** the survey
- 4 Once data has been collected, **make sure the sample is representative** of the target population by checking a number of known key features (geographic distribution, age... and any other relevant indicators)

If not, it will be necessary to adjust data or to collect complementary data.



2
(IM)PROVE'S
ADVICE

Some best practices
for designing a survey

1 Collect characterization indicators

(Age, gender...) at the end of the questionnaire rather than at the beginning

2 Test your questionnaire

With several people before launching data collection in order to identify understanding issues, potential bias, embarrassment problems, and to estimate its length

3 Adapt its size

To ensure a good response rate, adapt its size with the mode of administration and the quality of your relationship with the respondent

- × Interview duration depends on the way the questionnaire is administered and on the target audience (language barriers, difficulty in understanding technical issues...)
- × As a reference, a 60 question-questionnaire administered orally (face-to-face or by telephone) will last 10 to 15 minutes

4 Verify that each of the collected indicators will indeed be used and understood in the analysis phase

Delete any question which does not seem essential to you!

NB : Do not forget to include in your evaluation planning a sufficient delay for data to be collected.



YOUR
TURN!

Case Study
Ulisse Énergie SOLENI

STEP 1
DESIGNING THE QUESTIONNAIRE

Use your impact map and create your questionnaire using the tool of your choice.

In 2012, (IM)PROVE produced a benchmark of online survey tools.

>> [Link to the benchmark](#)

This can help you make your choice!

An online questionnaire is useful for data input, even if you decide not to collect data through the Internet.

3 - RAND() which generate a number between 0 and 1.

STEP 2
SETTING UP A SAMPLE

Sampling with Excel: in order to form a sample of respondents (e.g. 300) starting from a complete database of the target population (e.g. 1000 people):

- 1 Assign a numeric identification number (1 to 1000) to each item in the database
- 2 Randomly generate a series of 300 identification numbers
 - × Enter the formula = RAND() *300³
 - × Extend the formula in 300 cells
- 3 Interview respondents whose identifier has been drawn (making sure you delete the identification numbers that appear several times)!

3.8

Result analysis and report



1 WHAT IS IT ABOUT?

If the volume of collected data is small, the analysis may be performed in Excel. Otherwise, statistical analysis tools can be useful. For more information on statistical analysis, please consult the online course platforms such as **FUN** or **COURSERA**.

The way results are reported is critical

>> [Massive Open Online Courses FUN](#)

>> [Massive Open Online Courses COURSERA](#)



2 (IM)PROVE'S ADVICE

Whatever the format, the golden rule is transparency.

to value your work and its results. The format may differ depending on the target, communication challenges and broadcasting mode: infographics, impact report, PPT presentation, video...

An impact report should include:

- × **What are the limitations of the study?**
- × **What were the objectives of the study?**
What impacts were expected?
Which questions were asked?
- × **How were the impacts measured** (number of interviewees, administration mode...)?
- × **What conclusions are drawn regarding social impact?** What are the identified improvement levers (on the assessed intervention and the evaluation method)?



YOUR TURN!

Ashoka has developed a standardized reporting format (SRS - Social Reporting Standard) for social entrepreneurs.

Learn more:

>> social-reporting-standard.de/en



ILLUS- TRATION

For the SOLENI mission, two deliverable were drafted:

- × An exhaustive report for internal use
- × A synthetic report for external stakeholders and press release

To see the whole report (in French), click on the image below:

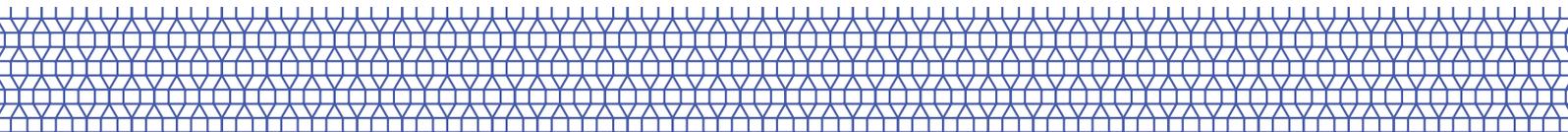
>> precarite-energie.org

[IMG/pdf/Mesure_Impact](#)

[SOLENI_2014_Juillet.pdf](#)

4. CONCLUSION

STEP						
CONTENT	<p>1 </p> <p>Impact assessment framing</p> <p>Assessment framework</p> <ul style="list-style-type: none"> × What? × For whom? × Why? × How? 	<p>2 </p> <p>Stakeholders mapping</p> <p>Stakeholders mapping Who are my organization's stakeholders? Which ones to study? Which ones to involve?</p>				
TOOL	<ul style="list-style-type: none"> × Framing grid <p>>> see this tool</p>	<ul style="list-style-type: none"> × Brainstorming × Mapping template <p>>> see this tool</p> <ul style="list-style-type: none"> × Prioritizing grid <p>>> see this tool</p>				
RESOURCES		<ul style="list-style-type: none"> × Brainstorming × Individual interviews × Formalising template <p>>> define your social issue</p> <p>>> define your social mission</p>				
		<p>3 </p> <p>Social issue and social mission</p> <p>Defining the social mission, the activities carried out and their objectives</p>				
		<p>4 </p> <p>Impact definition and mapping</p> <table border="1"> <thead> <tr> <th data-bbox="1125 862 1348 907">STEP 1</th> <th data-bbox="1364 862 1592 907">STEP 2</th> </tr> </thead> <tbody> <tr> <td data-bbox="1125 907 1348 1377"> Listing all intended and unintended impacts that can be observed on the field </td> <td data-bbox="1364 907 1592 1377"> Reducing impact list in order to keep only essential items and reduce workload </td> </tr> </tbody> </table>	STEP 1	STEP 2	Listing all intended and unintended impacts that can be observed on the field	Reducing impact list in order to keep only essential items and reduce workload
STEP 1	STEP 2					
Listing all intended and unintended impacts that can be observed on the field	Reducing impact list in order to keep only essential items and reduce workload					
		<ul style="list-style-type: none"> × Theory of change × Impact map <p>>> see this tool</p> <ul style="list-style-type: none"> × Bibliographic research × Experts interviews × Stakeholder interview 				



5 Defining measurement indicators

Translating all impacts into reliable and easy to collect indicators

- × REXEL Dictionary

- × Bibliographic research
- × Case studies
- × Experts interviews

>>>> see these resources



6 Formalizing the methodology

Choosing the methodology to evaluate change and attribution depending on your means and level of requirement

- × Framing grid

>> see this tool

- × Bibliographic research



7 Data collection

Building data collection tools

- × Online questionnaire tools like Google form
- × Paper forms
- × Interview guide

- × Bibliographic research



8 Result analysis and report

STEP 1

Analysing quantitative and qualitative data

- × Excel[®]
- × SAS[®]
- × Stata[®]
- × SPSS[®]
- × ...

STEP 2

Choosing the adequate format for the deliverable highlighting key indicators

- × Power Point[®]
- × Videos
- × Infographics
- × Report
- × ...

Conclusion

4 - A longitudinal impact assessment is a study conducted continuously, and that measure the social impact of the business year after year, as opposed to a one-time study which will give a picture of the impact at some point.

× **Keep in mind that impact assessment is not a static but rather a dynamic exercise.**

× **At first, do not include all your activities, geographical areas or stakeholders in your assessment. Start small and expand!**

× **In the expansion process, if you wish to move towards longitudinal impact assessment⁴, make sure impact assessment processes match existing processes as much as possible (satisfaction survey, operational monitoring of beneficiaries...) to reduce workload.**

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