



SOCIAL IMPACT MEASUREMENT TEMPLATES AND GUIDELINES

LEE Ho Samuel
KWAN Chi Hong Ted
LEE Kim Man Erica



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Address: Shop no. 14, 1/F, Block 8, City Garden Shopping Centre,
233 Electric Road, North Point, Hong Kong
Email: hksim@fses.hk

PREFACE

This set of templates originated from our previous workbook - “Social Impact Measurement - A step-by-step approach to devising outcome indicators”. For many social sector practitioners, they are usually busy at work in dealing with the project’s beneficiaries, this set of templates provides a quicker way to scrutinize the project’s purpose, logic and expected results, i.e. the Why, How & What aspects of the project.

For example, the reader is interested in how his/her project looks when compared to other similar projects, he/she can focus on the template of “Landscape Study” to perform a quick check to avoid duplicate effort, or to learn from other’s successful strategies before building his/her own logic model. These templates provide a systematic process in forcing the practitioners to think-through their projects from different perspectives (width) and from the value proposition (depth), with a view that whenever a new project comes into life, it addresses the most deprived people with the most imminent needs to a maximum of benefits created.

The field of social impact measurement is emerging quickly over the past few years. New knowledge and know-how are developing from academics, frontline workers, project in charges, as well as professional evaluators. We hope this booklet is of service by adding one piece of knowledge in promoting a better Hong Kong.

Ted Kwan, CFA

Project Director, Jockey Club Fullness Social Impact Measurement Coaching Scheme (2018-2022)

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AUTHORS' PROFILES



LEE Ho Samuel, AFHEA

Trainer, Jockey Club Fullness Social Impact Measurement Coaching Scheme
Director, Fullness Social Enterprises Society

Mr Lee is a lecturer with HKCT Institute of Higher Education and teaches various courses on or related to social innovation and social entrepreneurship. He is also a member of The Practice Research Centre of HKCT.

Mr Lee previously served as a lecturer with The Education University of Hong Kong. He established the infrastructure for the continuous development of resources and capabilities for the teaching and learning of social innovation at the Department of Asian and Policy Studies.

Mr Lee obtained his MSc in City and Regional Planning from Cardiff University. He is an Associate Fellow of the Higher Education Academy.



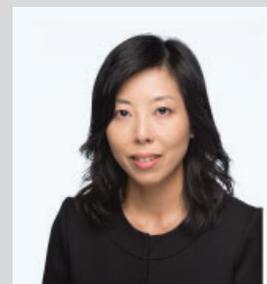
KWAN Chi Hong Ted, CFA

Chairman, Fullness Christian Social Enterprise Ltd.
Councilor, Stewards
Academic Advisor, Department of Sociology, HKBU
Project Director, Fullness Social Enterprises Society

Mr Kwan is the Chairman of Fullness Christian Social Enterprise Limited, the co-founder of Fullness Social Enterprises Society (FSES), and a Councilor of Stewards. He has more than 10 years of operating experience in social enterprises, which led Fullness Salon to receive the SE Award in 2011. He has been the Principal Trainer of the Jockey Club Fullness Social Impact Measurement Coaching Scheme since 2018.

Mr Kwan has more than 12 years of professional training experience and is the founder of Hong Kong Investment Training Institute, which specializes in investment and financial training. He is also a columnist for Eduplus Magazine.

Mr Kwan earned his first degree in Hong Kong, followed by a Master's degree in Singapore. He has been a CFA charterholder since 2001, and he received the Decenary Award from the Hong Kong Society of Financial Analysts in 2011.



LEE Kim Man Erica, PhD, FHEA
Director, Fullness Social Enterprises Society

Dr Lee is a lecturer and a consultant in the field of social entrepreneurship and social impact measurement. Her research interests are in the areas of social entrepreneurship, social impact measurement, and social innovation.

Dr Lee has published papers in top-tier journals and has presented papers at internationally reputable conferences.

Dr Lee has been awarded the status of a Fellow by the Higher Education Academy (HEA). She obtained her PhD in the field of social entrepreneurship from Hong Kong Baptist University.

Brainstorming / Finetuning Outcomes



Stakeholders



Level 1
Affective States



Level 2
KSA



Level 3
Behavioural Change



Conditions

Beneficiary

Other Stakeholder

Guidelines for this template

Purpose

To brainstorm the intended outcomes of your programme and to finetune them after you study more about your programme by filling in the templates for problem understanding, identifying a theory of change, conducting a landscape study, identifying a value proposition, and working out a logic model.

Illustration

Brainstorming to be conducted based on the following framework:

Level 1 Affective outcomes
such as satisfaction with a programme, subjective wellbeing and self-esteem;

Level 2 Cognitive outcomes
such as knowledge and skill acquisition and attitudinal / perceptual change;

Level 3 Behavioural outcomes
such as the intended behavioural changes; and

Outcomes that represent condition development and/or improvement, whereby members of the beneficiary group may find it easier to attain the intended outcomes.

Please finetune the brainstormed outcomes after you go through the next five templates including that for problem understanding, that for developing a theory of change, that for conducting a landscape study, that for crafting a value proposition and that for designing a logic model.

Understanding Problem

Problem Analysis	WHAT is the problem?	
	WHERE does it exist?	
	WHO is affected by it?	
	WHEN does it occur?	
	HOW serious is it? (to what degree is it felt?)	
Problem Statement		
Root Cause		
Assessed Needs		

Guidelines for this template

Purpose

To craft a precise and concise problem statement

To identify the root cause of your programme and assess the needs of the target beneficiaries

Illustration

By combining the answers to 5W's (what, where, who, when, and how) relating to your programme, you will be able to create a precise and concise problem statement.

By conducting desktop research, you will be able to identify the root cause of your programme and assess the genuine needs of the beneficiary group(s) that your programme targets.

Theory of Change

Name of the theory	
Intervention strategy (What you do)	
Result(s) (What you get)	

Guidelines for this template

Purpose

To identify a theory or a number of theories to explain why your programme is effective in terms of making an impact.

Illustration

A well-established theory is usually used, but a common practice can also be accepted.

Landscape Study

Service Gap:

Project Evaluation	Existing Project / Intervention 1	Existing Project / Intervention 2
Existing Programmes Comparable to Yours		
Description		
Target Beneficiary Group(s)		
Extent to which the most important needs are addressed (Large / Medium / Small)		
Extent to which the programme addresses those needs (Large / Medium / Small)		
Extent to which the programme benefits a large beneficiary group (Large / Medium / Small)		
Cost Effectiveness (High / Medium / Low)		
Scalability (High / Medium / Low)		
Sustainability (High / Medium / Low)		

Existing Project /
Intervention 3

Existing Project /
Intervention 4

Guidelines for this template

Purpose

To compare your programme with similar programmes offered by any other organizations.

Illustration

Desktop research may be required.

You may ignore some of the criteria given in the template if they are not applicable to the nature of your programme.

The result of this comparison should be a service gap that your programme tries to fill in.

What is your value proposition of your project?

Criteria for determining where the value proposition of your project lies	Does it meet the criteria? And why?
Does it focus on the most important needs?	
Does it address those needs extremely well?	
Does it benefit a large beneficiary group?	
Cost effectiveness	
Scalability	
Sustainability	

Guidelines for this template

Purpose

Identify the value proposition(s) of your programme with reference to one or two of the criteria given in this template.

Illustration

The value proposition is the unique position of your programme relative to other programmes of a similar nature. It should echo the service gap that you have identified in the previous template, i.e. that for conducting a landscape study.

Logic Model

Your Planned Work		Your Intended Results		
<p>Resources / Inputs Certain resources are needed to operate your programme.</p>	<p>Activities If you have access to resources, you can use them to accomplish your planned activities.</p>	<p>Outputs If you accomplish your planned activities, you will hopefully deliver the amount of product and / or service that you intended.</p>	<p>Outcomes If you accomplish your planned activities to the extent you intended, your participants will benefit in certain ways.</p>	<p>Impacts If these benefits to participants are achieved, certain changes in organisations, communities, or systems might be expected to occur.</p>

Guidelines for this template

Purpose

To turn the theory of change into details for programme implementation.

Illustration

Please work it out by beginning with the end, i.e., impact.

Outcome Indicators

Outcome	Indicators	Method of measurement (e.g. pre & post, exit score, numeric figures, rubrics, assessment by coach, self-evaluated)	Justification/ reason	Benchmark or Comparable or Reference value or Goal (e.g. HK avg score, usage or unit cost of similar stuff, etc.)
<p>Level 1 - Affective </p> <p>(Feel good about themselves, or about the program, Happier, more hope, etc.)</p>				
<p>Level 2 - Knowledge, Skills & Attitude </p> <p>(increase in knowledge, know the ways to seek help, willing to try, etc.)</p>				
<p>Level 3 - Behavioral </p> <p>(increase in number of interaction, walk more, smoke less, talk more, smile more, time spent in positive activities, meet more friends, talk longer, etc.)</p>				
<p>Conditions </p> <p>(Improved in personal conditions, or environmental conditions, more accessibility, more usage, etc.)</p>				

Purpose

To develop indicators that will be used to measure how far the intended programme outcomes will have been achieved.

Illustration

When you have determined the outcomes, you develop outcomes into indicators. Remember that each of those indicators will be turned into a question. So when you develop an indicator, you need to think about the respective measurement method and identified an appropriate point of comparison (e.g. benchmark, goal, etc.). You also write down the reason why you have set such an indicator for communication with your project team.

The indicators should meet the following criteria:

1. Full coverage of outcomes
2. Specific
3. Measurable
4. Cost-effective
5. Sensitive
6. Mutually exclusive

Social Impact Monetization

	Item	Monetised Impact (\$)
Market Valuation	Workfare	\$
	Direct Benefit/Subsidy	\$
	Personal / Family Savings	\$
	Social / Govt Cost Savings	\$
Directly Comparable Items	Value of any similar item	\$
Direct Valuation (Contingent Valuation)	Willingness to Pay/ Willingness to Accept	\$
Opportunity cost	Alternative Cost (Opportunity Cost)	\$
Nominal Cost	Cost of conducting the social project / intervention	\$

Guidelines for this template

Purpose

If applicable, monetize the social impact so that the audience will be able to grasp an overall impression of how large the impact is.

Illustration

Monetization of the social impact of your project should be based on one of the following items, which are listed in an ascending order of robustness:

1. Market Valuation

- E.g. salary, cash subsidizes, actual pocket savings, medical cost savings, travel expense savings

2. Direct Comparables

- Valuation of similar stuff, adjustment may need to fit the circumstances
- E.g. volunteering per hour (min wage or market hourly rate); time-saving for an adult (min wage per hr); time-saving on travelling (cost of MTR trip)
- E.g. Media exposure, EAV

3. Direct Valuation

- WTP/WTA - Ask directly from beneficiaries.
- E.g. increase of life option (生涯規劃), increase likelihood of entering a good primary school (面試班), reduction in body weight, etc.

4. Opportunity Cost

- The social impact should have a value that equal to cost of providing next best alternative to achieve the same result
- E.g. a learning achievement is equivalent to cost of alternate classroom training cost

5. Cost

- The value of something should be at least equal to the cost of providing it.
- E.g. a public pier has no market value, but its value shall at least equal to the construction cost.

6. Implied Valuation

- When values are not observable, no alternative, unable to ask from respondents, the value may need to be implied by statistical techniques, e.g. Well-being valuation (增進幸福感, 增加喜樂. . .)

Towards Systemic Change

Practices	Outcomes	Indicators
Coalitions	Formation of partnerships	(e.g., No. of stakeholder groups aligned)
Coalitions	Disciplined stakeholder engagement	(e.g., No. of communities of practice / interest)
Communication	Building up shared understanding / visions	(e.g., No. of visioning exercises / meetings)
Communication	Efforts to develop a number of success stories / examples	(e.g., No. of stories to be reported in mass media)
Credibility	Seeking professional recognition	(e.g., Q-mark)
Contingencies	Equipping a group of practitioners with both new skills and attitudes	(e.g., No. of people joining the Train the Trainer Scheme)
Contingencies	Engaging the beneficiaries in programme execution in the future	(e.g., No. of beneficiaries to be engaged as volunteers in the future)
	Other (Please specify: _____)	Other (Please specify: _____)

Guidelines for this template

Purpose

To identify strategies or measures that can be put in place during the programme period with a view to fostering systemic change, e.g. policy reform.

Illustration

If you have adequate resources, you may implement all the strategies given in the template.

If not, feel free to fill in some of the boxes that are applicable to your programme.

Sustainable Development Goals (SDGs)



Which Goal(s)?

Which Target(s)?

Which Indicator(s)?

Guidelines for this template

Purpose

To identify the United Nation's Sustainable Development Goal(s) that your programme will achieve / help achieve.

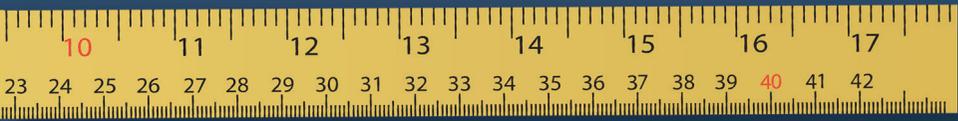
Alignment with an SDG /SDGs would help you appeal to international corporates who have been increasingly using SDGs as a language to describe what they have done to practice corporate social responsibility.

Illustration

You may align your programme with one of the SDGs in United Nation's official website:

<https://sustainabledevelopment.un.org/?menu=1300>

Please bear in mind that only if you are able to identify the appropriate target and indicator that correspond to your programme, you can claim that your programme aligns with a particular SDG that comprises that target and indicator.



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