

# IMPACT MEASUREMENT – WHAT’S NEW?



WELCOME

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Head, Geneva Centre for Philanthropy

**John Pepin**

Chief Executive, Philanthropy Impact



## PANEL

Moderated by

Dr **Maximilian Martin**

Global Head of Philanthropy, Lombard Odier

Prof. **Stefan Sperlich**

Geneva School of Economics and Management, UNIGE

Prof. **Zenda Ofir**

Independent International Evaluator

**Eric Berseth**

Executive Director, Philanthropy Advisors

**Nicole Adler**

Associate, elea Foundation



# What are they talking about ?

evaluation

monitoring

impact



measurement

treatment effect estimation

# Monitoring vs. Evaluation

## Definitions

MONITORING: *Continuous process of examining the context and the delivery of programme outputs*, which is carried out during the execution of a programme with the intention of immediately correct any deviation from operational objectives.

EVALUATION: *Systematic collection and analysis of information about programmes and projects, with the purpose of obtaining knowledge on what programmes and policies have achieved*, and understand how they performed in order to better design, implement, and deliver future programmes and policies.

# Monitoring & Evaluations

## Connection: M&E

- Different functions, teams, responsibilities, procedures
- **Common goal: Programme delivery improvement and programme objectives achievement.**
- Close interactions and need to permanent cooperation

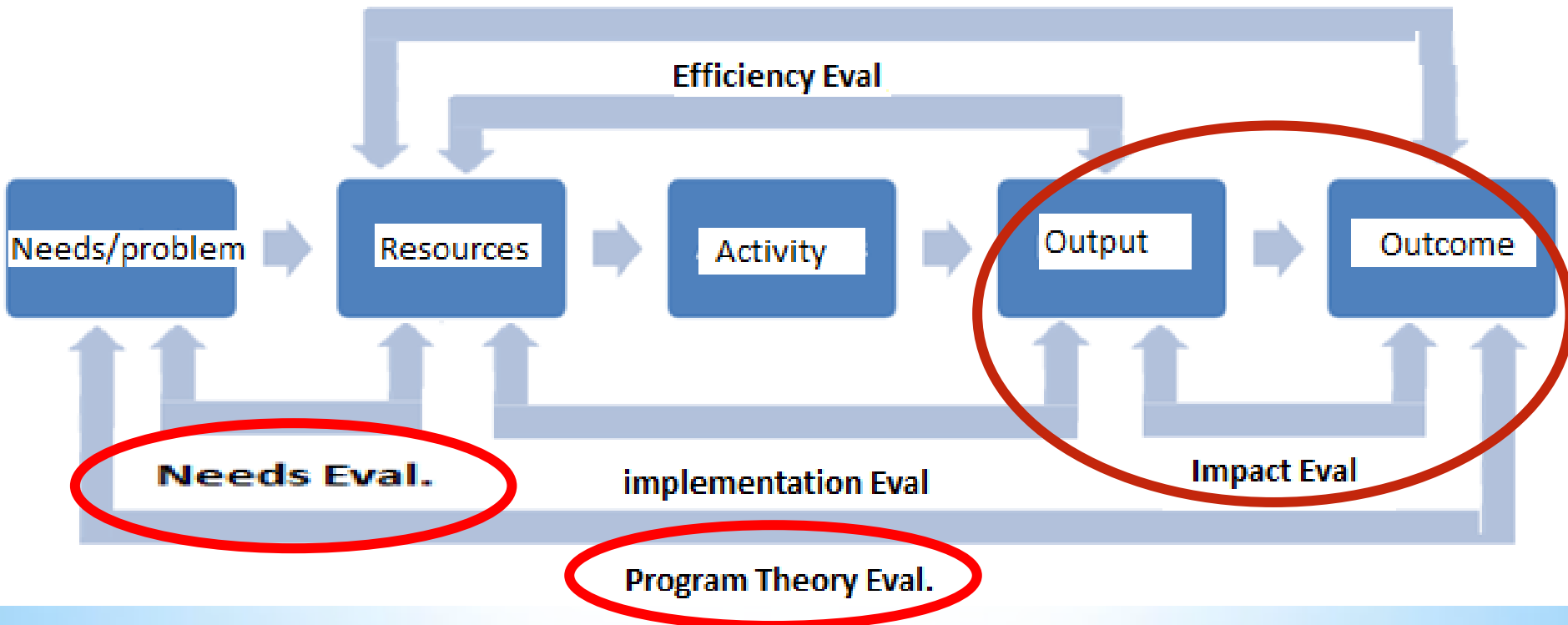
## Various, different Evaluations

- Needs assessment (specify indicators / metrics)
- ...
- **Impact evaluation (looking at these indicators)**
- ...

# Types of Evaluation in the chain of changes

Cost Benefit Eval / Cost Effectiveness Eval

Efficiency Eval



# Impact Evaluation

- Think of population of individuals susceptible to treatment
- Let  $Y$  be (one of) the variable or indicator of interest
- $Y_1$  the outcome for an individual if exposed to treatment
- $Y_0$  the one for the same individual if not exposed

$$TE (individual) = Y_1 - Y_0$$

- As individuals differ in how much they gain from treatment

$$AvTE = E [ Y_1 - Y_0 ]$$

- The **average treatment effect** is a standard measure
- of causal effects of treatment ( ‘total’ impact )



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# THE IMPACT MEASUREMENT LANDSCAPE

PRESENTATION AT LUNCH EVENT, CENTRE FOR PHILANTHROPY, UNIVERSITY OF GENEVA

21 NOVEMBER 2017

ZENDA OFIR

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# I. EVALUATING 'IMPACT' IS A SERIOUS RESPONSIBILITY THAT REQUIRES UNDERSTANDING BEYOND "WHAT CHANGED"

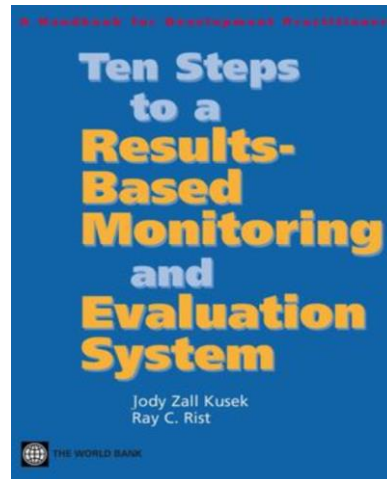
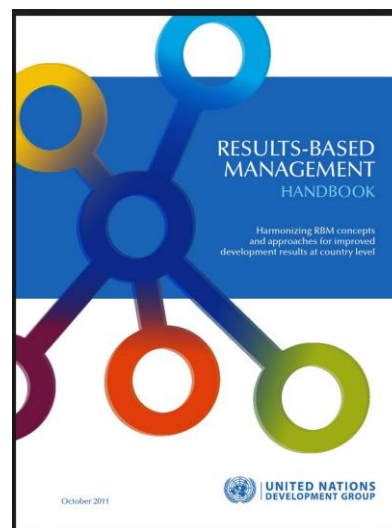




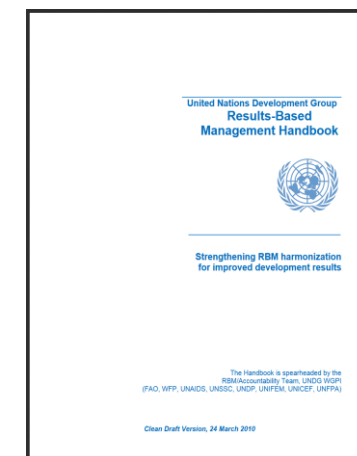
## 2. DETERMINING 'IMPACT' IS FASHIONABLE - FOR GOOD REASON. THIS HAS LED TO A LARGE BODY OF WORK, ESP. IN 'DEVELOPMENT'



# A FOCUS IN 'AID' AND DEVELOPMENT EVALUATION SINCE 1991 ....



Results Based Management





# ....WITH SIGNIFICANT DISPUTES OVER METHODOLOGY

Stanford **SOCIAL INNOVATION** Review  
Informing and inspiring leaders of social change

SOCIAL ISSUES SECTORS SOLUTIONS MAGAZINE

Measurement & Evaluation

## RCTs: Not All That Glitters Is Gold

A look at the limitations of randomized control trials.

SHARE COMMENT PRINT ORDER REPRINTS

By Maria A. May | Aug. 28, 2012



ABOUT US IDEAS + PRACTICE GRANTS LATEST UPDATES

Search

Education Environment Global Development and Population Performing Arts Cyber Madison Initiative Effective Philanthropy SF Bay Area Special Projects

## RCTs for global development: What's all the fighting about?

By Ruth Levine | March 7, 2016



## The Coming Prosperity

How to Make the Most of Humanity's Moment

Wednesday, September 7, 2011

### Why Randomized Controlled Trials Work in Put Health...and Not Much Else

If there is a next big thing at the moment in the field of economic application of techniques from medical research—specifically, “randomized controlled trials,” or RCTs—to assess the effectiveness of development other government-initiated projects. The general thrust of the work is simple as it is brilliant: rather than employ complex, and often untested statistical methods to tease out the extent to which a project or program actually had a beneficial impact on intended beneficiaries, why not try the tried and true methods employed by pharmaceutical research

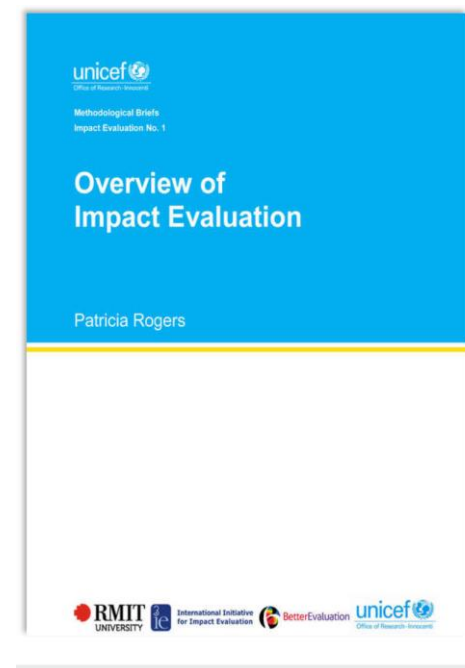
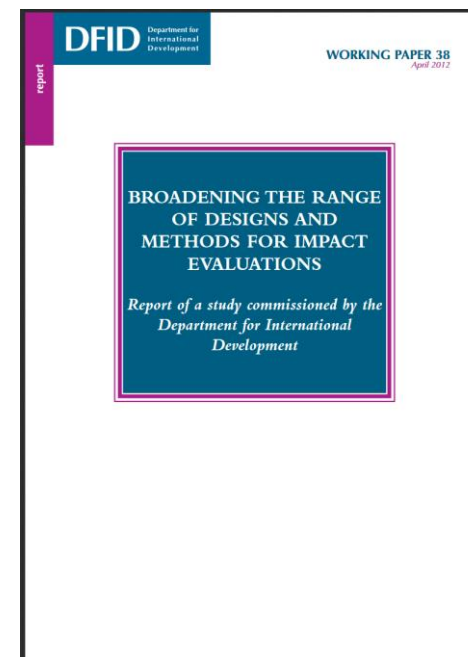


## WHEN WILL WE EVER LEARN?

IMPROVING LIVES THROUGH  
IMPACT EVALUATION

REPORT OF THE EVALUATION GAP WORKING GROUP

MAY 2006



## Understanding and Misunderstanding Randomized Controlled Trials

Angus Deaton, Nancy Cartwright

**NBER Working Paper No. 22595**  
**Issued in September 2016, Revised in October 2017**  
**NBER Program(s): AG, DEV, HC, HE, LS**

### 3. 'IMPACT' IS DEFINED IN MULTIPLE WAYS BY DIFFERENT GROUPINGS, WHICH HAS LED TO SOME CONFUSION

#### **The widely used OECD DAC definition of impact:**

The positive and negative [primary and secondary, long-term] changes produced by an intervention,  
directly or indirectly,  
intended or unintended.



Changes in values/beliefs, behaviour, knowledge, skills, opportunity, condition, state, system, etc.



## OTHER CONCEPTUALISATIONS OF 'IMPACT'

**Commonly understood:** The difference interventions make.

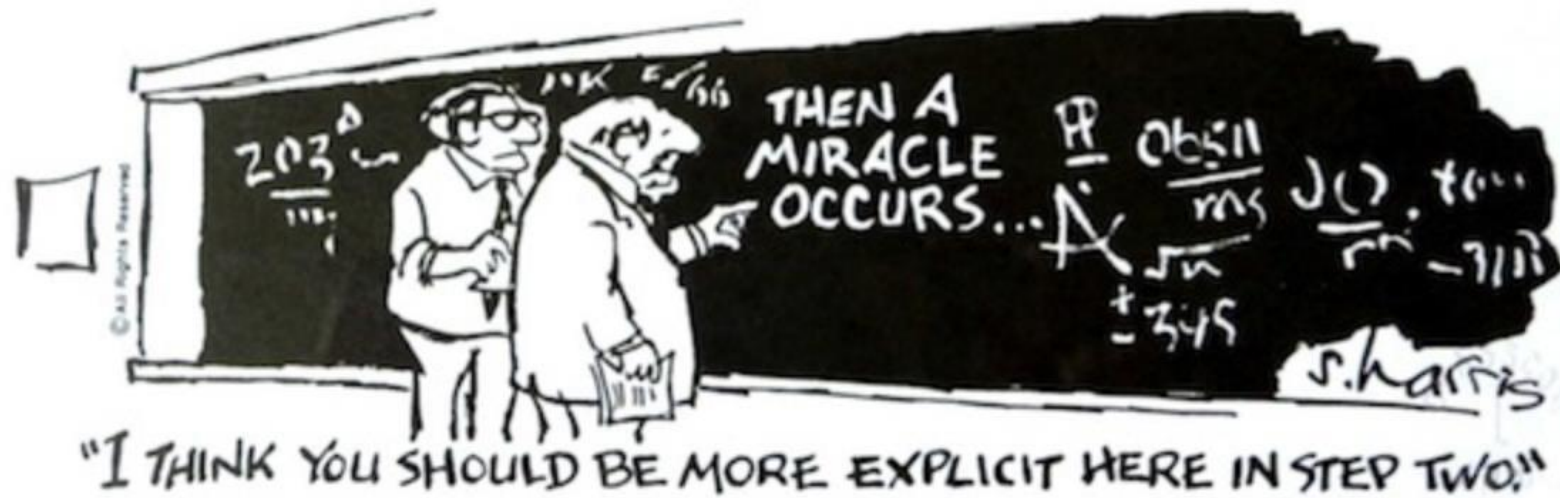
**3ie:** How an intervention alters the state of the world.

**Counterfactual definition from statistics and econometrics:** The measured difference of a predefined indicator (e.g. school test score) with the intervention and without the intervention.

**Kellogg Foundation:** *Outcomes:* Specific changes in program participants' behavior, knowledge, skills, status and level of functioning. *Impact:* Changes to organisations, communities or systems as a result of program activities within seven to 10 years.

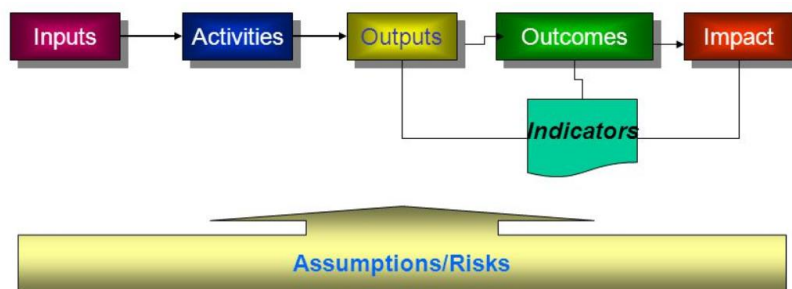
**IFAD:** The attainment of development goals of the project or program, or rather the contributions to their attainment.

# DEFINITIONS ARE DERIVED FROM HOW 'CHANGE' IS UNDERSTOOD

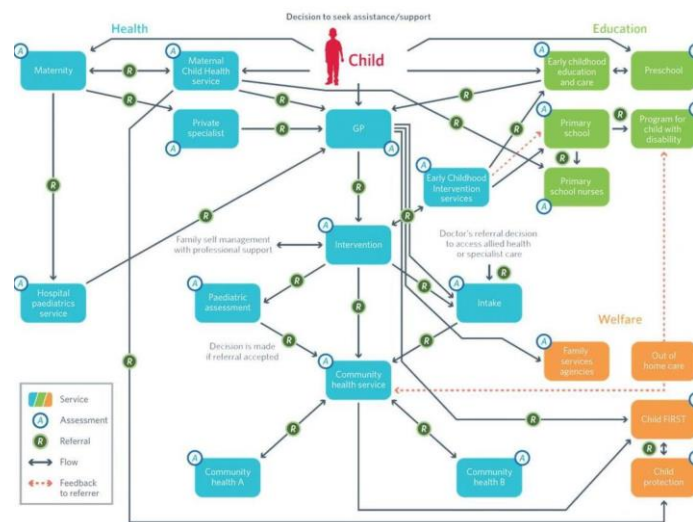




# DEFINITIONS ARE DERIVED FROM HOW 'CHANGE' IS UNDERSTOOD (CONT.)



*Simplistic results chain – reductionist, linear.*

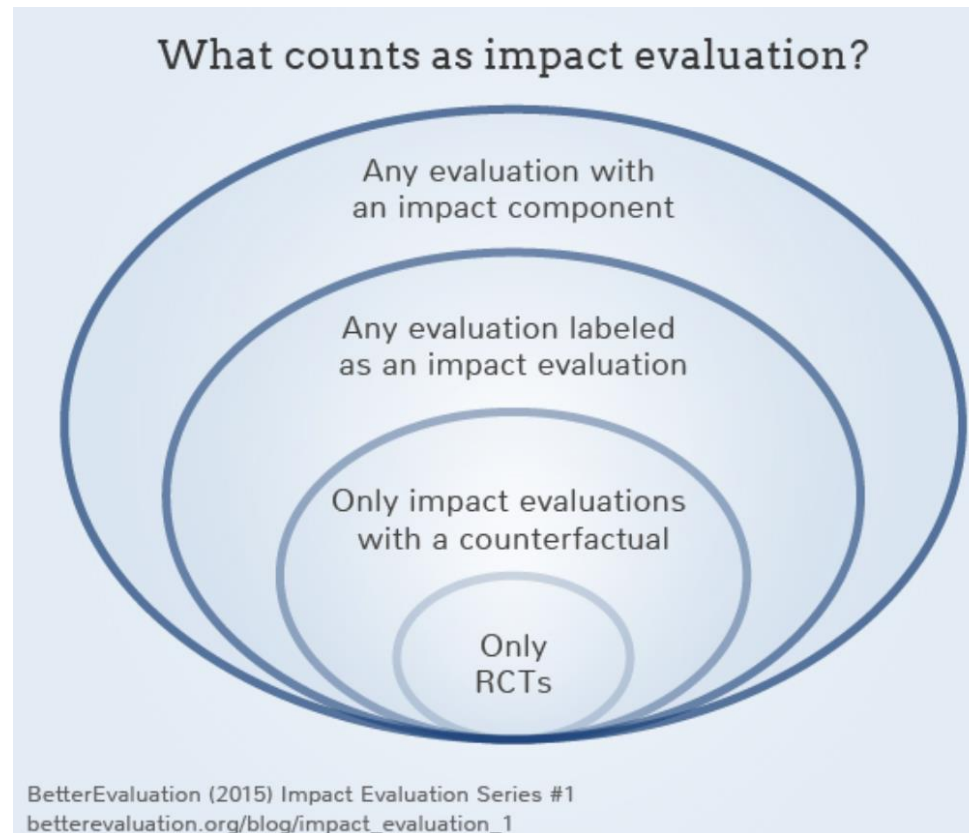


*The Collective Impact Framework recognises feedback loops & the non-linearity of change.*



*Recognes the interconnectedness of sustainable development*

## 4. 'IMPACT EVALUATION' IS DEFINED, DONE & SOLD IN MULTIPLE WAYS. WE NEED TO RECOGNISE THAT DIVERSITY.





# DEFINITIONS OF IMPACT EVALUATION

## **InterAction**

Any evaluation that systematically and empirically investigates the impacts produced by an intervention.

## **The World Bank poverty/net**

Assesses changes in the well-being of individuals, households, communities or firms that can be attributed to a particular project, programme or policy.

# DEFINITIONS OF IMPACT EVALUATION

## **3IE (2008)**

Rigorous impact evaluation studies are analyses that measure the net change in outcomes for a particular group of people that can be attributed to a specific program using the best methodology available, feasible and appropriate to the evaluation question that is being investigated and to the specific context.

## **USAID**

Evaluations that measure the change in a development outcome that is attributable to a defined intervention; impact evaluations are based on models of cause and effect and require a credible and rigorously defined counterfactual to control for factors other than the intervention that might account for the observed change.



## 5. IMPACT EVALUATIONS ARE USEFUL – BUT AT THE RIGHT TIME, AND TOGETHER WITH OTHER TYPES OF EVALUATION.

Needs assessment /  
diagnostic evaluation

Developmental  
evaluation

Meta-analysis

Process  
evaluation

Results / emerging  
impact monitoring

Evaluation  
synthesis

Compliance  
evaluation

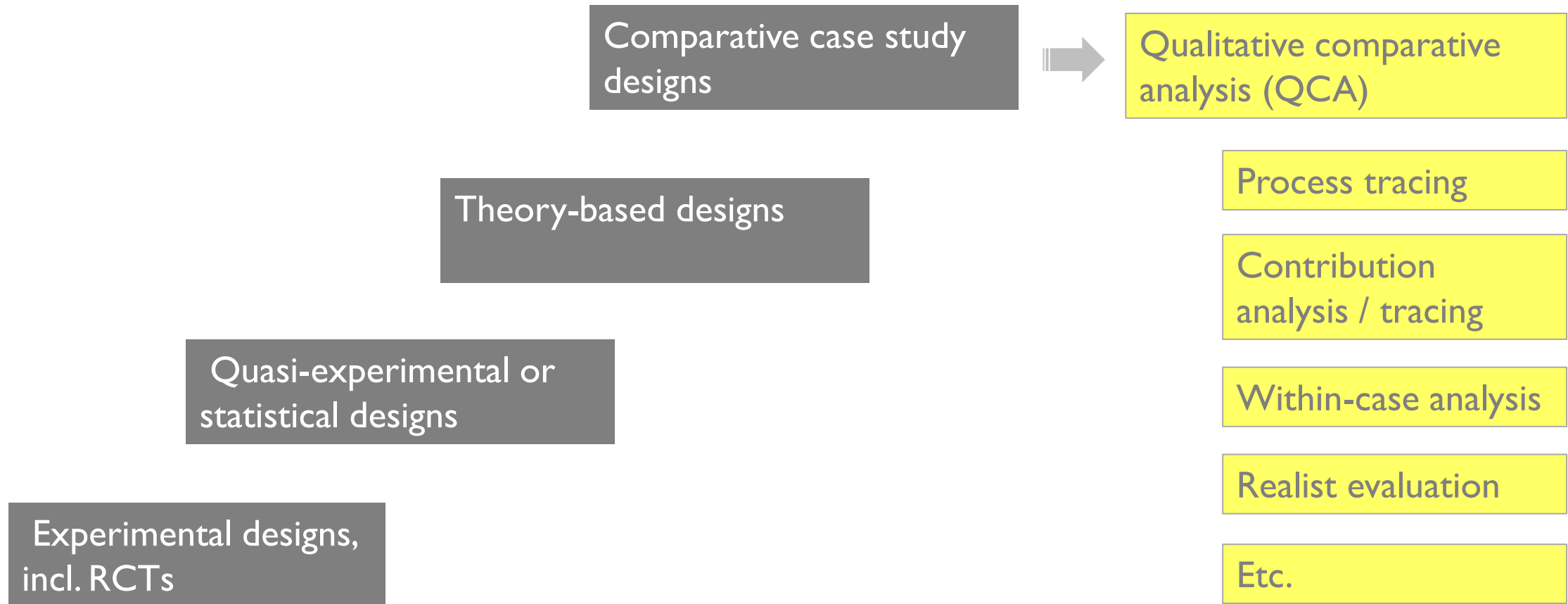
Summative  
evaluation

Meta-  
evaluation

Formative  
evaluation

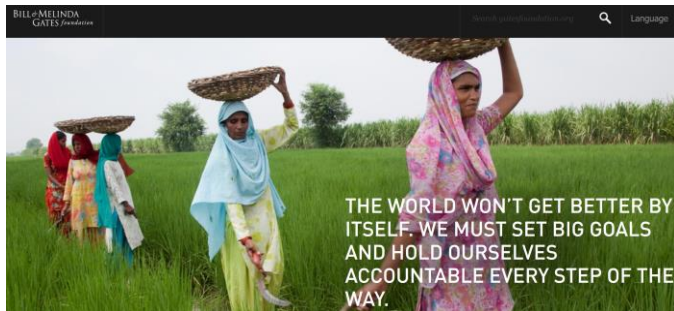
Impact  
evaluation

## 6. IMPACT EVALUATIONS ARE METHODOLOGICALLY DIVERSE. DESIGNS ARE OFTEN COMBINED.





# 7. PHILANTHROPY AND THE PRIVATE SECTOR HAVE FOLLOWED TO DATE. WILL YOU INNOVATE AND LEAD?



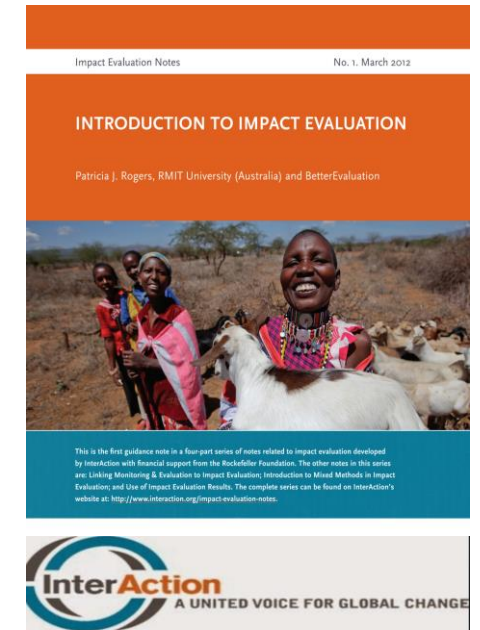
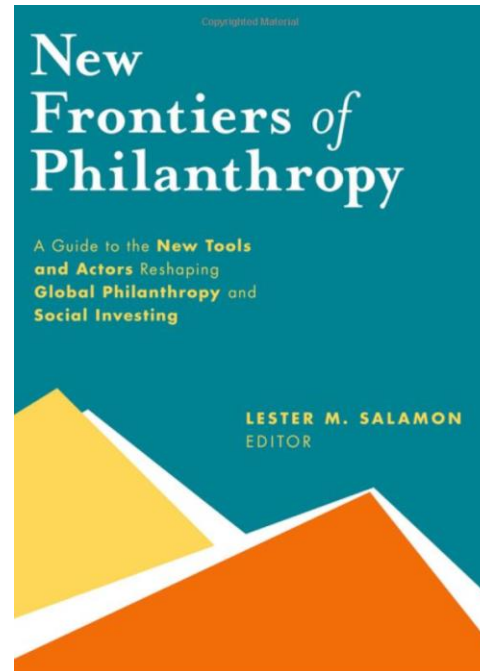
ANNOUNCING THE LAUNCH OF



**Leading Philanthropists Announce Co-Impact, a Global Collaborative for Systems Change, With U.S. \$500 Million in Planned Initial Funding**

November 15, 2017

Initial core partners include Richard Chandler, Bill and Melinda Gates, Jeff Skoll, Romesh and Kathy Wadhvani, and The Rockefeller Foundation



The **Impact Management Project** is the voice of over 700 practitioners from across geographies and disciplines.

## Partners

We are enabled by a diverse group of thoughtful funders:

And facilitated by:



Contributing Authors:

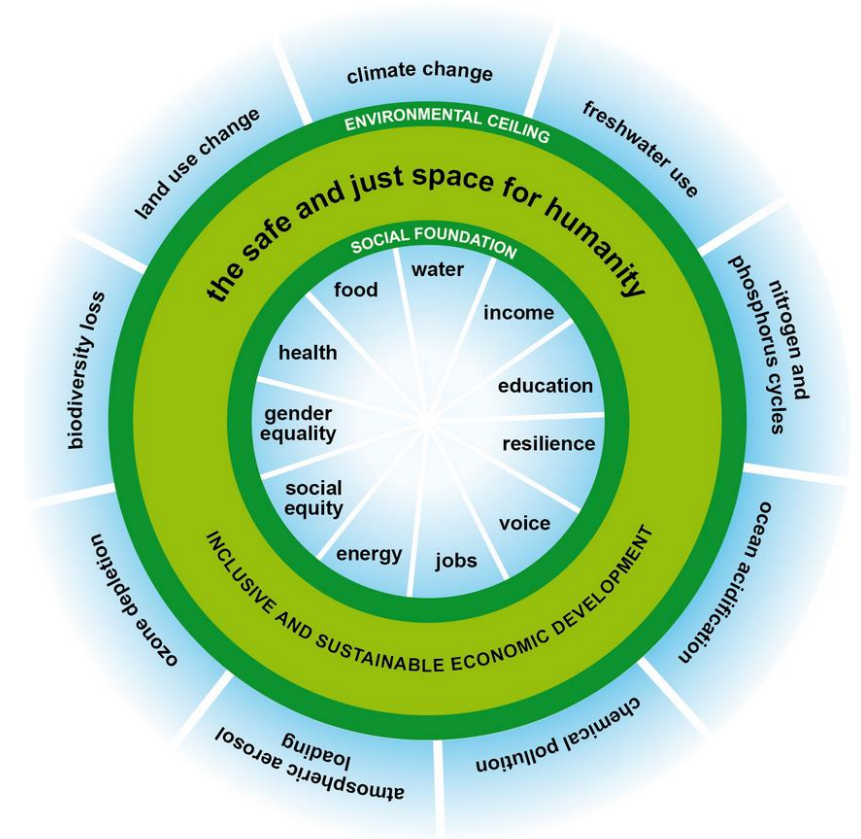
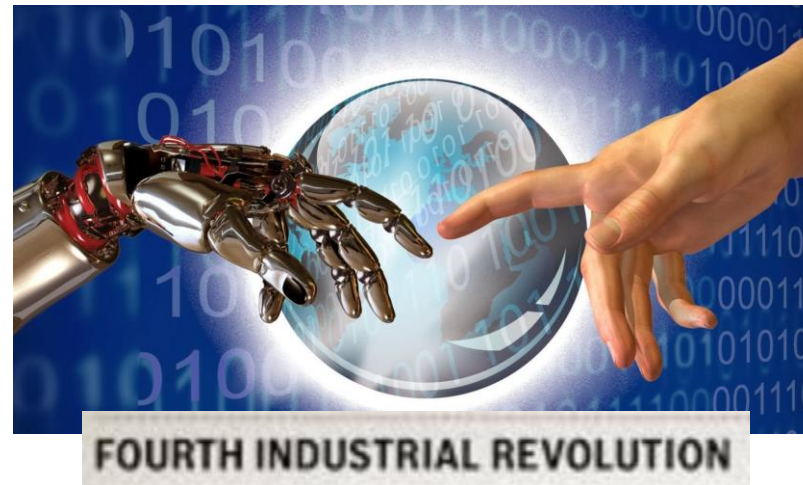


Partners:





# WE ARE IN A CHALLENGING ERA



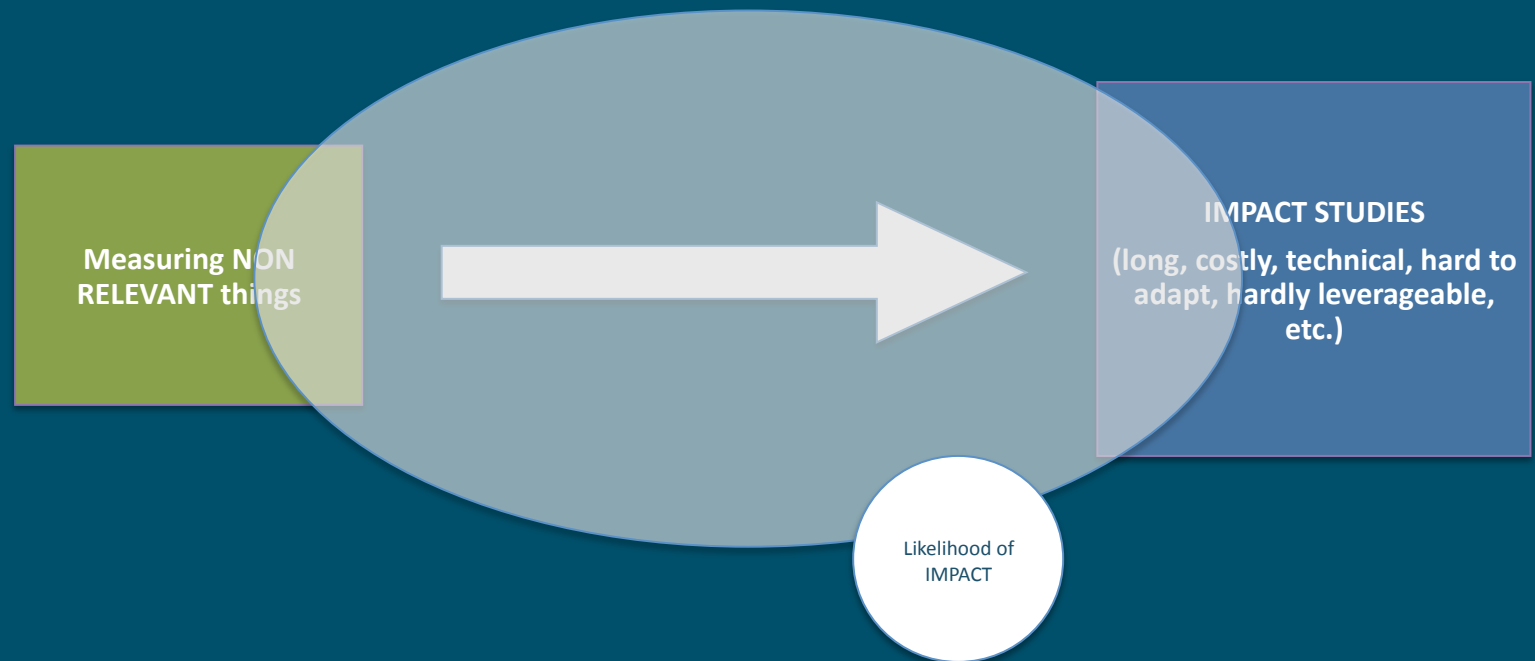




IN THIS ERA WE NEED TO TAKE RISKS; THINK ANEW; INNOVATE IN EVALUATION



# IMPACT Measurement : A matter of INCEPTION





## WHY do we MEASURE

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### ***OPERATORS'LED***

1. They want to improve their impact in the beneficiaries
2. They want to be compliant with donor's requests

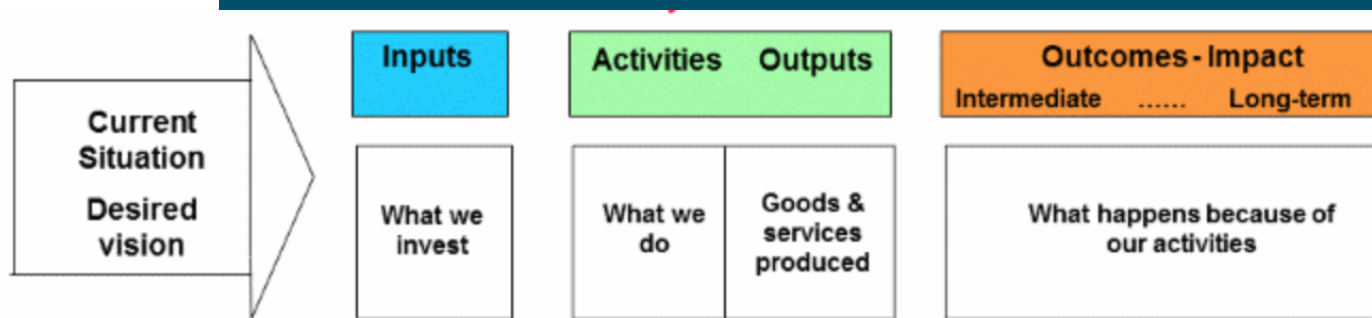
### ***DONORS'LED***

1. Public / institutional donors – Need to be are accountable to the people they collect from.
  2. Individual donors (UHNWI, NexGen) – Want to understand, guarantees
  3. Foundations – Profesionalize, Innovating, Seeking for more impact
  4. Corporate Philanthropy / CSR – Strategic philanthropy & Risk management
-



# The necessity of An initial FRAMEWORK

## 1. THEORY OF CHANGE



Source : <http://learningforsustainability.net/theory-of-change/>

## 2. INDICATORS

**S**pecific,  
**M**easurable,  
**A**chievable,  
**R**elevant,  
**T**ime-bound



PHILANTHROPY ADVISORS

HIB - PHII



ICRC

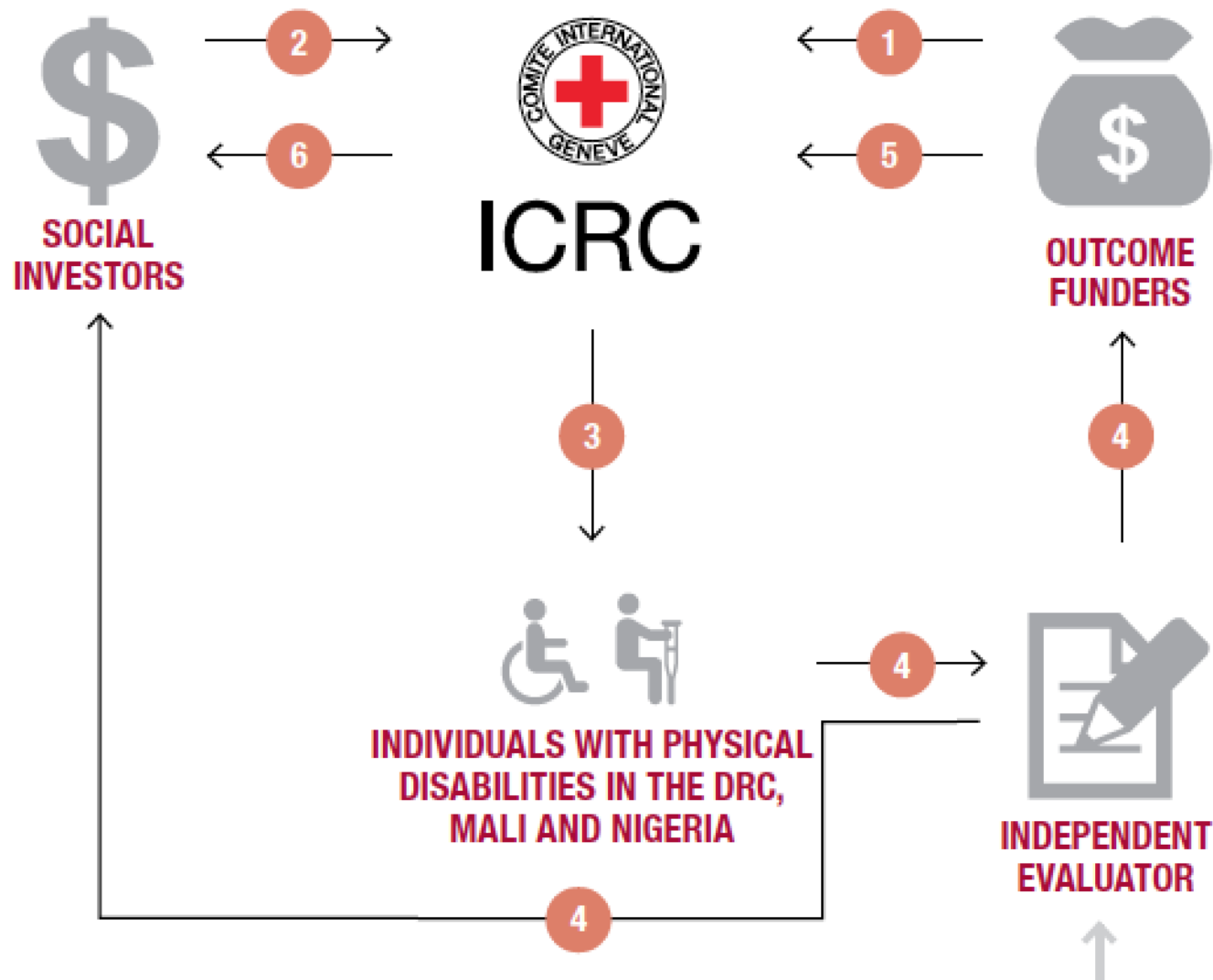


Photo: M. Kokic / ICRC

Source : ICRC, 2017, HUMANITARIAN IMPACT BOND in a nutshell, FOCUS



HIB - PHII



Source : ICRC, 2017, HUMANITARIAN IMPACT BOND in a nutshell, FOCUS



OUTCOME-BASED  
STAFF EFFICIENCY  
RATIO (SER)

=

# OF BENEFICIARIES HAVING REGAINED  
MOBILITY THANKS TO A MOBILITY DEVICE  
# OF LOCAL MOBILITY DEVICE  
PROFESSIONALS





# elea's impact measurement approach

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Center of Philanthropy, University of Geneva  
21 November 2017

# Measuring success





elea

Impact through entrepreneurship

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# Where is the phone call out of poverty?

Investment example: BagoSphere



**From:** Absolute poverty,  
less than USD 2/day

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**To:** Well-paid job at a call-  
center, starting a career in  
the service sector

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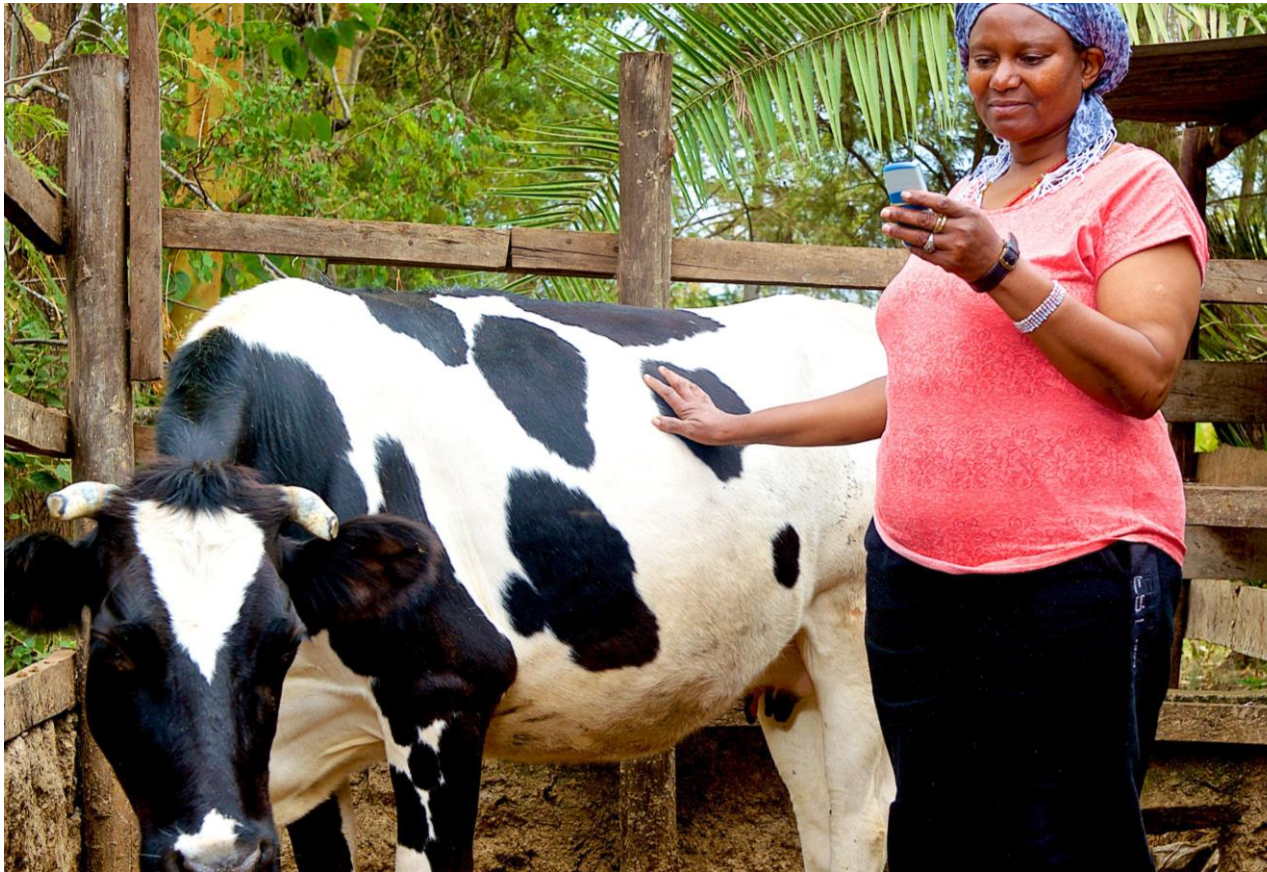
**How?** Micro-credit funded  
professional training pro-  
gram and job placement

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Call-center training for rural youth (BagoSphere, Philippines)

# Do a few SMS make me a better farmer?

Investment example: iCow



Farmer reading information on cattle breeding (iCow, Kenya)

**From:** Absolute poverty,  
less than USD 2/day

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**To:** Improved livelihoods  
through better farming  
practices

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**How?** Mobile technology  
based agricultural  
information platform

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# elea Impact Measurement Methodology (eIMM)

## Principles

- Comparing relative social impact
- Setting impact goals and tracking progress
- Identifying and acting upon challenges
- Communicating impact



B'Ayoba, Zimbabwe



## CONCLUSION

Prof. **Henry Peter**

Head, Geneva Centre for Philanthropy

**Julie Wynne**

Chair of the Geneva branch, Philanthropy Impact  
Attorney at Law, FRORIEP



## SAVE THE DATE

Next Philanthropy Lunch on Mission Related Investment

Thursday 8 February 2018

12:00 - 2:00 pm, Uni Dufour

*In partnership with Ethos*