

Measurement & Evaluation for CSR: Perspectives from the field

CVNY MONTHLY MEETING

MARCH 18, 2020

LAURA HOLLOD

Welcome & Agenda

- ✓ What is M&E?
- ✓ What are current M&E-related trends and approaches for CSR?
- ✓ Highlighting a practical M&E tool: the Theory of Change
- ✓ Questions & conversation

About me



'90's-'00's

2003-2009

2009-2012

2012-2014

2014-2019

2019-current

Raised outside of Pittsburgh, Pennsylvania, with a love of sports, outdoors, science & numbers

Obtained Bachelor of Science in Biology from University of Notre Dame, and Master of Public Health in Epidemiology from Emory University

Presidential Management Fellow with Centers for Disease Control (CDC), focused on public health program evaluation

Responsible for evaluating programs providing care, treatment & support to people living with HIV/AIDS at NYC Dept of Health

Designed & implemented social impact measurement & evaluation approach as a part of Johnson & Johnson's Global Community Impact team

Independent consultant partnering with social-minded companies, foundations, and impact investors to support social impact measurement

What is Measurement & Evaluation (M&E)?

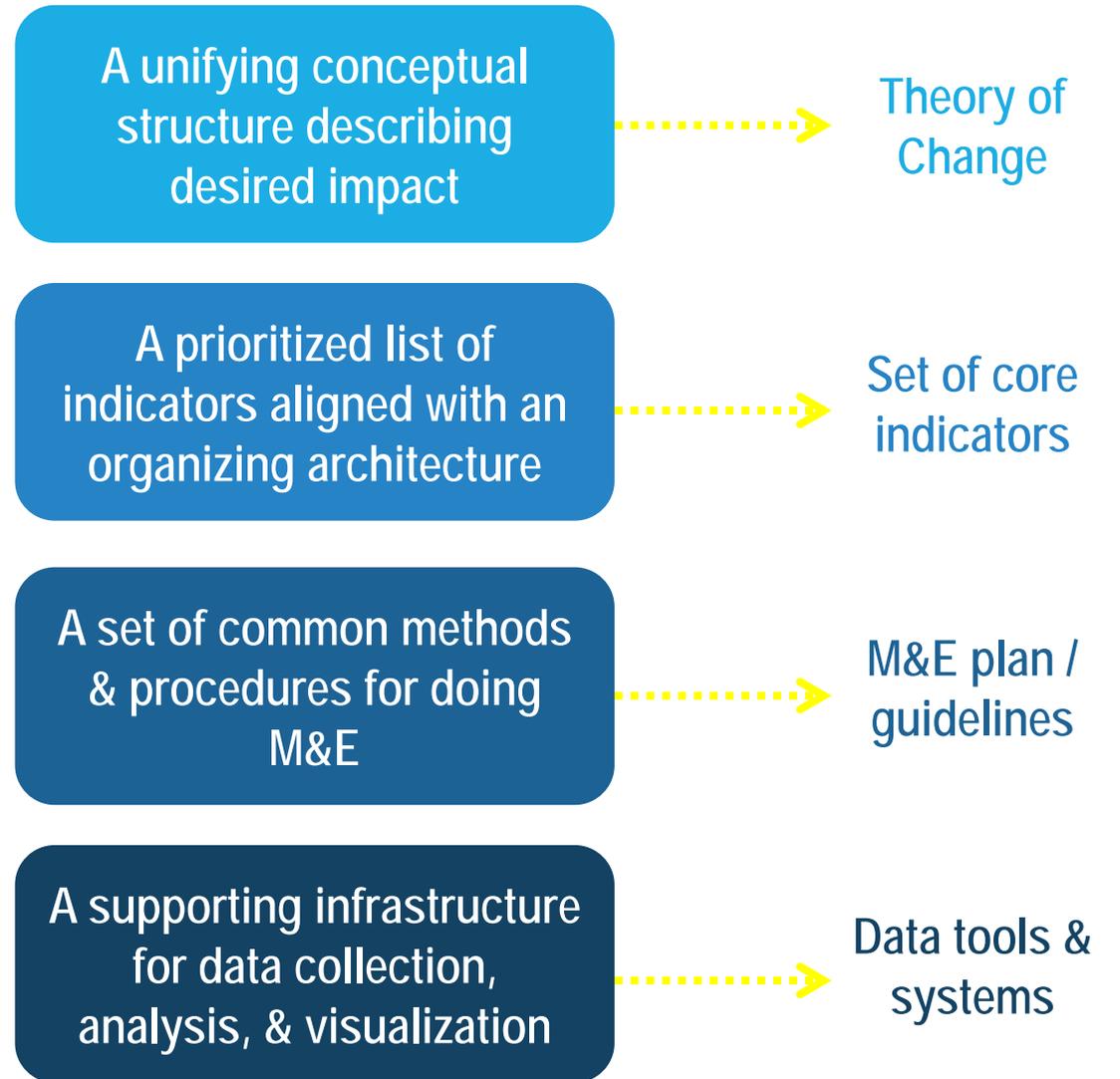
Defining M&E

Measurement & Evaluation is a term broadly used to describe an organization's **framework & approach** for **defining & understanding progress toward** desired impact.

Sometimes, the M refers to Monitoring, and it's worth pointing out a distinction:

- ✓ **Monitoring** = ongoing, regular collection of data to understand progress toward programmatic objectives
- ✓ **Evaluation** = episodic, often retrospective assessment of program worth or value

An M&E approach usually consists of...



An M&E Framework is comprised of two major components: a **Theory of Change** and a **Set of Core Indicators**.

For **CSR programs**, the framework should integrate domains of **social** and **enterprise value add**.

Theory of Change: What is the organization doing, & what are the key pathways of change toward the ultimate desired impact?

Inputs → Strategies → Outputs → Outcomes → Impact



Set of Core Indicators: What does the organization measure, to understand progress toward success?

Level	Component	Type	Indicator	Data Source	Methods

M&E for CSR: Current trends & approaches



1. A holistic lens to measuring social + enterprise



2. Aligning with global frameworks



3. Connecting data + storytelling

CECP Giving in Numbers

Trends in what & how companies are measuring

Source: <https://cecp.co/wp-content/uploads/2019/10/GIN2019-complete-WEB2.pdf>

FIGURE 22

Measurement of Social Outcomes by Scope of Measurement, 2018, and Growth Rate of Scope of Measurement, Five-Year Matched Set, 2014-2018

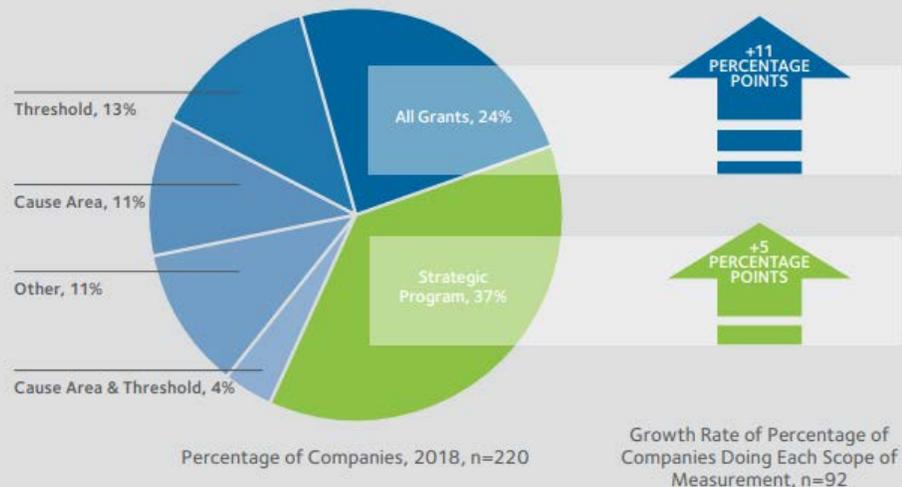
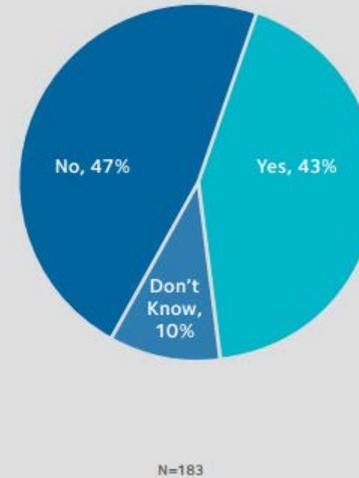


FIGURE 23

Measurement of Business Value of Community Investments through Employee Metrics, 2018

Does Your Company Measure the Business Value of Community Investments in Terms of Metrics that Assess Employees?



Most Important Employee Metric, 2018

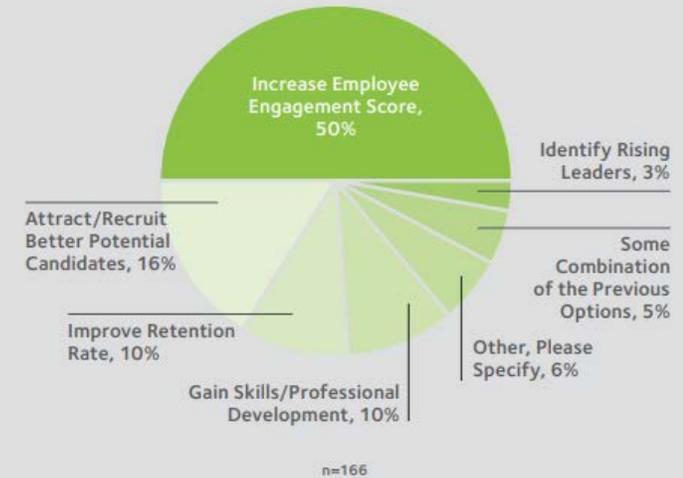
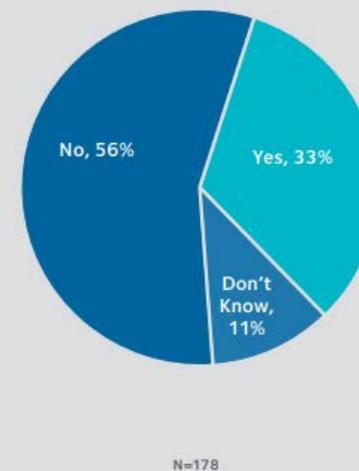


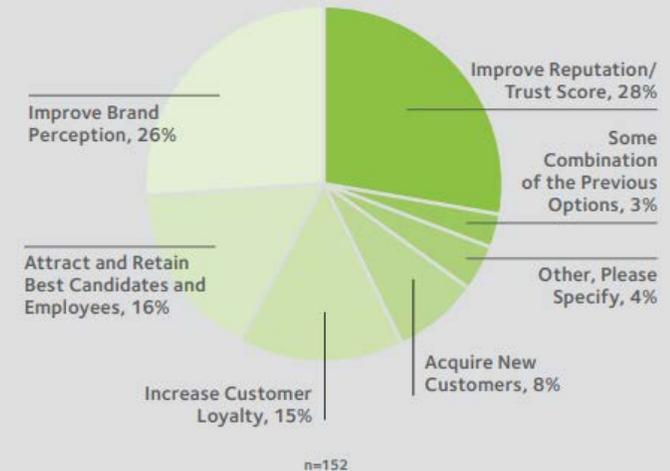
FIGURE 24

Measurement of Business Value of Community Investments through Brand/Customer Metrics, 2018

Does Your Company Measure the Business Value of Community Investments in Terms of Metrics that Assess the Brand or Customers?



Most Important Brand/Customer Metric, 2018



Highlighting a practical M&E tool: the Theory of Change

Theory of Change (TOC) vs. Logic Model (LM)

A **TOC** is a hypothesis essential to planning, implementing, and evaluating a program, addressing:

- Ultimately, what do you seek to achieve?
- How do activities lead to desired ultimate impacts?

The TOC may make explicit:

- Assumptions made
- Evidence for causal pathways

It should be based on in-depth understanding of the landscape.

It can be written as a **narrative**, and/or visualized via **diagram** / other visual

The **LM** is one way of visually depicting a TOC.

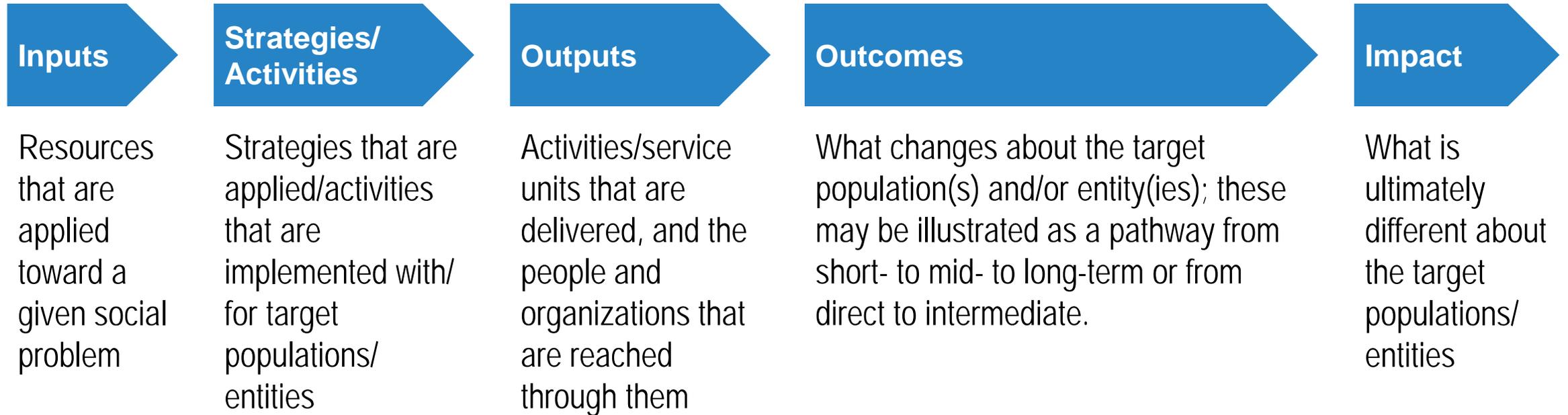
It usually employs a linear (left-to-right) format

At a minimum, an LM shows the links between:

- resources to be brought to bear,
- activities or services to be implemented, &
- what will be changed among a target population or entity

The term LM is **often used interchangeably** with TOC, though this is not entirely accurate. One approach is to say something like “this is our organization’s TOC, presented in an LM format.”

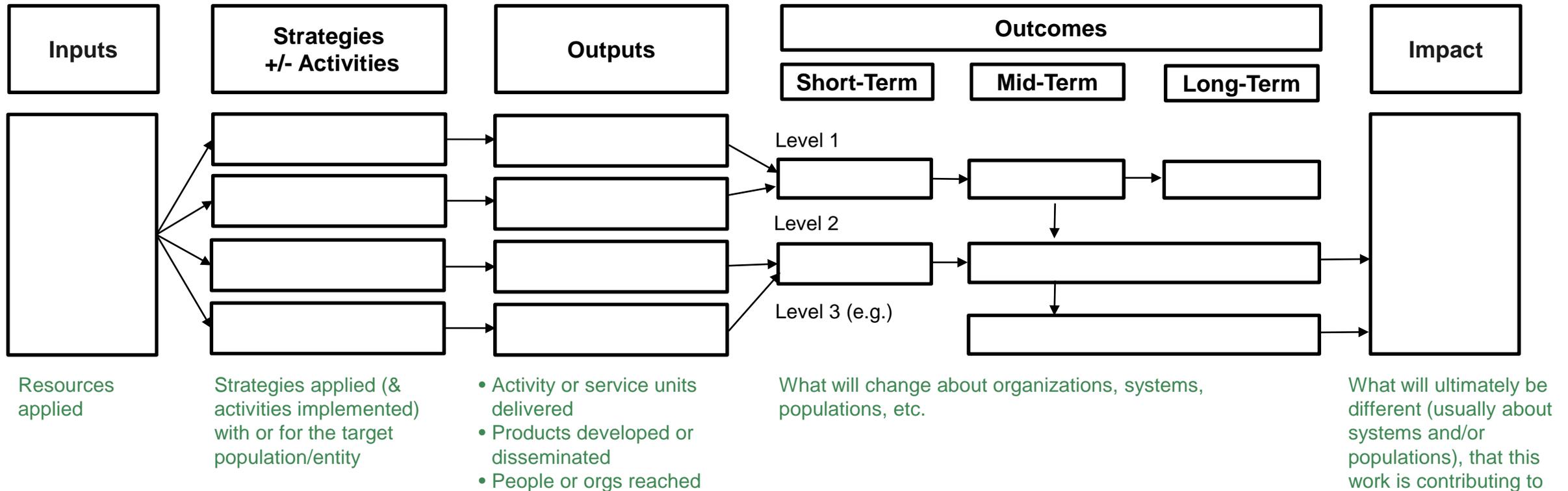
Key components of a Theory of Change



Key components of a Theory of Change (DETAIL)

Target population/entity:

The target for change



Assumptions

What must be true externally for results to be achieved

Figure 1. The LBG Framework. For a larger version of the Framework see Appendix 1

 Inputs: What's contributed?	 Outputs: What happens?	 Impacts: What changes?
<p>How (form of contribution)</p> <ul style="list-style-type: none"> Cash Time In-kind (including pro bono) Management costs <p>Why (driver for contribution)</p> <ul style="list-style-type: none"> Charitable gifts Community investment Commercial initiatives in the community <p>What (issue addressed)</p> <ul style="list-style-type: none"> Education Health Economic development Environment Arts and Culture Social welfare Emergency Relief <p>Where (location of activity)</p> <ul style="list-style-type: none"> Europe Middle East & Africa Asia Pacific North America South America 	<p>Community outputs</p> <ul style="list-style-type: none"> Individuals reached/supported Type of beneficiary Organizations supported Other company-specific output measure (e.g. environment) <p>Business outputs</p> <ul style="list-style-type: none"> Employees involved in the activity Media coverage achieved Customers/consumers reached Suppliers/distributors reached Other influential stakeholders reached <p>Leverage (additional resources from other sources)</p> <p>Total leverage split by:</p> <ul style="list-style-type: none"> Payroll giving Other employee contributions Customers Other organizations / sources <ul style="list-style-type: none"> Employees involved in own time Hours contributed in own time Foregone Income 	<p>Community impacts</p> <p>On people i: Depth of impact</p> <ul style="list-style-type: none"> Made a connection Made an improvement Made a transformation <p>On people ii: Type of impact</p> <ul style="list-style-type: none"> Behavior or attitude change Skills or personal effectiveness Quality of life/well-being <p>On organizations</p> <ul style="list-style-type: none"> Improved or new services Reached more people or spent more time with clients Improved management processes Increased their profile Taken on more staff or volunteers <p>On the environment</p> <ul style="list-style-type: none"> Impact on the environment Impact on environmental behavior
		<p>Business impacts</p> <p>On employee volunteers</p> <ul style="list-style-type: none"> Job-related skills Personal well-being Behavior change <p>On the business</p> <ul style="list-style-type: none"> Human resource benefits Stakeholder relations/perceptions Business generated Operational improvement delivered Uplift in brand awareness

London Benchmarking Group (LBG) Framework for Corporate Community Investing

A high-level Theory of Change-style framework

Source: http://www.lbg-online.net/wp-content/uploads/2018/10/LBG-Public-Guidance-Manual_2018.pdf

Inputs **Strategies** **Short-term & Intermediate Outcomes** **Impact**

- ✓ Funding
- ✓ Innovative financing strategies
- ✓ Networks
- ✓ Convening power
- ✓ Voice
- ✓ Expertise

Grantmaking

Place-based approaches for underserved populations

Systems strengthening & coordination

Build diverse leadership capacity & share knowledge

Thought Leadership

Communicate, convene, & share learnings on best practices to promote child well-being

Capacity

Enhanced capacity for diverse & representative individuals, organizations, & networks to lead effective efforts

Stronger, more effective individuals, organizations, & networks

Social Change Levers

Broader, more equitable access to quality care

New & responsive models made available

Cross-sector & -agency coordination at neighborhood, city & state levels

Enhanced community mobilization

Data-driven policy & practice

Advanced equity for practitioners, communities, families, and children representing underserved populations

A supportive & collaborative funding ecosystem for child well-being

Ecosystem

Improved and more equitable outcomes for children & families

Company X Theory of Change

INPUTS

OUTPUTS

OUTCOMES

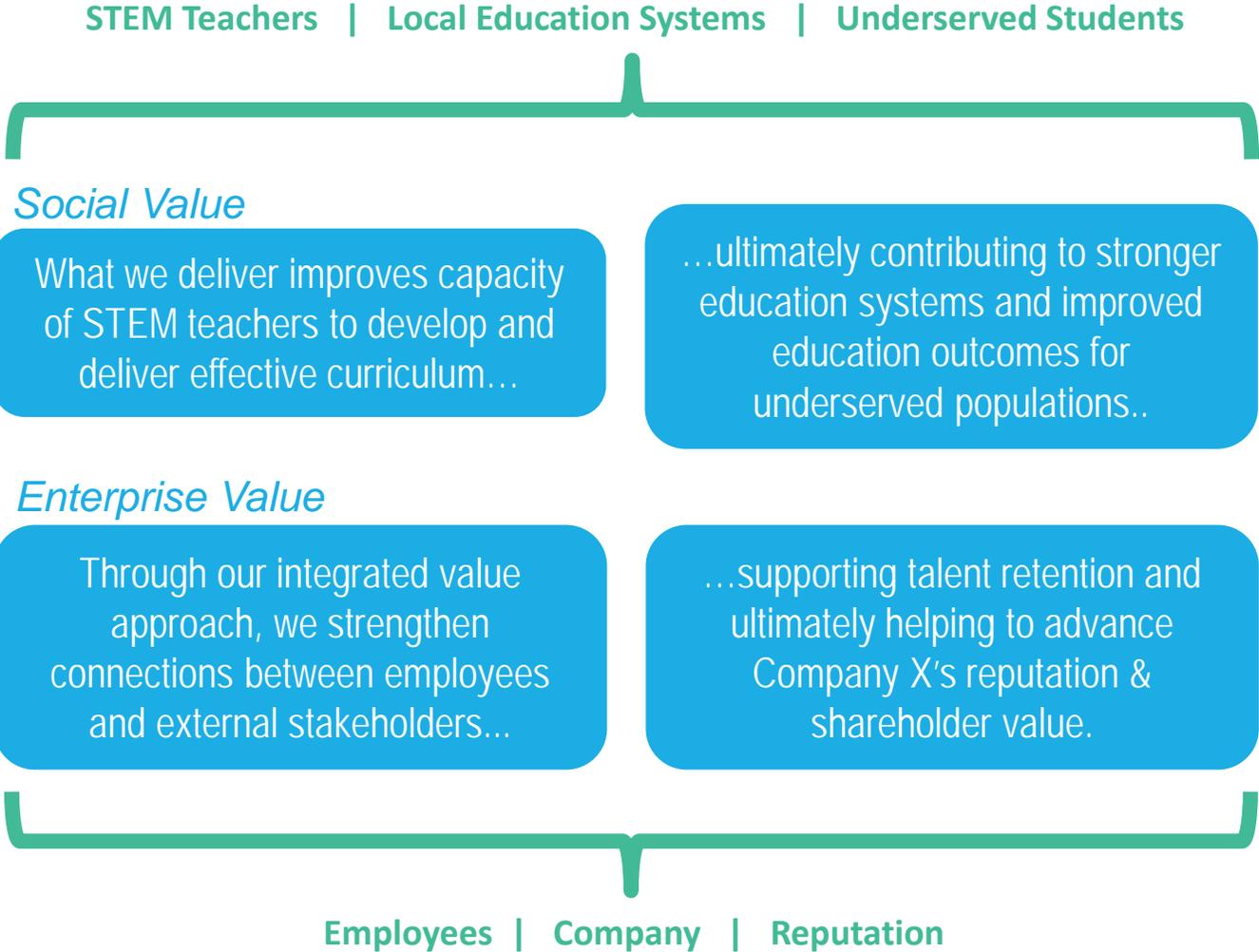
Our **work contributes to social change at 3 levels**, which allows for connection across program & focus areas.

Company X's CSR efforts provide a wide range of resources through a variety of mechanisms:

- ✓ Grants
- ✓ Convenings
- ✓ Employee engagement

Our work supports a strong education system to deliver STEM teachings esp. to underserved students, yielding deliverables both directly and through our partnerships.

Our **work also promotes enterprise value across 3 levels**.



Resources

- [Hivos: Theory of Change Thinking In Practice](#) provides a detailed guide on Theory of Change with tools and tips for building your own.
- [Nesta's Theory of Change](#) template offers a simplified tool that organizations can complete for themselves.
- [Harvard University's Tip Sheet on Question Wording](#) offers helpful ideas for designing and administering surveys.
- The [BetterEvaluation Rainbow Framework](#) provides a tool for evaluation planning.
- When you are ready to visualize your data using graphs and charts, in a report format, this [Data Visualization Checklist](#) is helpful.

Thank you!

Questions?

Contact

Laura Hollod, MPH

laura.hollod@gmail.com

1.724.462.4106

