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SOCIAL IMPACT MEASUREMENT MODEL FOR JUST A CHANGE

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Abstract

The emerging and growth of the social sector is setting the beginning of a new era: a global society concerned about social problems and seeking for social impact as an important result of an organization's output. Accordingly, a new management process is gaining importance nowadays: impact measurement.

The current paper intends to demonstrate the overall importance of impact measurement and how it should be implemented by Just a Change, a Portuguese-based social enterprise. A qualitative model to measure its impact on its beneficiaries and volunteers is developed and recommendations on implementation and analysis are provided.

SI	Social Impact
IV	Impact Venture
ToC	Theory of Change
JAC	Just a Change

Table 1: Document Key Words

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Methodology

The current project is aimed at developing a model to measure the social impact of *Just a Change* (*JAC*). In order to design an appropriate model that aligns the goals and the requirements of impact measurement with the goals, needs and resources of *JAC*, a lot of research on the topic and a deep

understanding of *JAC*'s current context was required. Hence, during the four months this project was being developed, weekly meetings with *JAC*'s team members took place as a way of gaining a deep knowledge on the organization and on its current context. Such meetings allowed the construction of a model that is totally aligned with *JAC*'s interests. Additionally, a workshop on the *Theory of Change* was conducted to the Board of Directors, in the beginning of April, with the objective of building the *Theory of Change* of *JAC* and aligning the Board towards the same purpose. Also, meetings with the supervisor were conducted in order to validate the work being developed and to provide feedback and suggestions for further developments. Finally, a last meeting with Professor Susana Peralta was held during the survey construction process, as a way of assuring the questions were addressing the right indicators in the right manner. All these meetings were very important for the development of the overall project, and particularly to the construction of the model, which is the main output of this project. At the end, a small pilot (to 10 people) was conducted in order to validate the clarity and applicability of the surveys.

Literature Review

Impact Measurement

According to the European Venture Philanthropy Association (EVPA) (2015), a lively community of organizations that share the common goal of creating positive societal impact through Venture Philanthropy, measuring impact is not an end in itself. Instead, it should be a mean to attain the ultimate goal of an Impact Venture (IV), which is to manage and control the process of creating social impact in order to maximize and optimize it. Therefore, measuring impact is about providing a better support for the people IVs are committed to help.

According to a paper published by the New Philanthropy Capital (NPC) (Benedict Rickey, 2011), good impact measurement can deliver significant benefits in 6 key areas: finding out progress against mission; learning how to improve; securing funding; inspiring staff and improving their work; raising profile; and finally, contributing to knowledge of "what works".

Models to Measure Impact

There are already some institutions working on the development of the best methodologies to measure impact. Although each of them presents different frameworks, with more or less steps in the way and emphasizing different stages of the process, all of them agree on one common denominator: the Theory of Change (*ToC*).

According to NPC (2014) "designing a measurement framework around your *ToC* will then ensure you collect information that tells you what difference you are making". Seen as *an organization's blueprint for success* by David Hunter (2013), the *ToC* describes the change one IV wants to make and the steps involved in making that change happen (Angela Kail, 2012). It is often shown in a diagram, so that the causal links between the steps required to achieve the change are made clear. The *ToC* is considered by all as a crucial basis for measurement because, through it, the key outcomes that absolutely need to be measured are identified. In order to build a *ToC*, the distinction between concepts like *inputs*, *outputs*, *outcomes* and *impact* must be made clear. According to a paper published by PHINEO, both inputs and outputs are at the level of what an IV does, while outcomes and impact are at the level of what the IV aims to achieve (PHINEO, 2016).

However, there is a complexity associated with the definition of social impact, which differs among entities, as well as with the frameworks developed to measure it. EVPA (2015) defends that the analysis of five factors is crucial for the accurate calculation of social impact. Those factors are: the *deadweight* – what would have happened anyway; the *attribution* – the action of others; the *drop off* – how far the outcome of the initial intervention is likely to be reduced over time; the *displacement* – the extent to which the original situation was displaced elsewhere or outcomes displaced other potential positive outcomes; and the *unintended consequences*. Thus, EVPA's recommendation for measuring social impact is to calculate outcomes while acknowledging and adjusting for those factors that contribute to increasing or decreasing the impact of the IV. (Hehenberger, Harling, & Scholten, 2015) Accordingly, EPVA considers outcomes to be "the changes, benefits, learnings or

other effects that result from the organization's activities" while social impact as "the attribution of an organization's activities to broader and longer-term outcomes". As mentioned before, EVPA (2015) defends that impact measurement should be seen as a *learning process to manage impact* and proposes 5 steps to measure it: one should start by getting a deep knowledge about the problem and about its context in order to set clear and reasonable objectives; afterwards, it is crucial to analyze the different stakeholders as a way of understanding theirs needs and assure those are fulfilled in order to achieve stakeholder engagement; later, identifying the intended outcomes, prioritizing among them and selecting appropriate indicators for each, always considering the five aforementioned factors, should be done in order to measure results; after selecting a measure, it is time to verify whether the desired change is being achieved or not; and finally, monitoring and reporting should take place, which is about collecting data in a systematic way to track performance against objectives and presenting the information for future analysis and conclusions.

In turn, PHINEO, a non-profit corporation that is aimed at strengthening the non-profit sector, developed the Social Impact Navigator, a practical guide for IVs to target better results as a way to respond to what they identify as the social sector's problem: a lack of expertise and a lack of instruments to systematically integrate impact orientation into IVs' work, though their will of achieving the best possible results. (PHINEO, 2016) While considering inputs as the resources that are invested in the project, and outputs, outcomes and impacts as results, it is interesting to note that PHINEO suggests a definition of outputs, outcomes and impact that differs from other entities: the results at the level of products and services – outputs; the results at the level of the target groups – outcomes; and the results at the society level – impact. (*Appendix 1*)

The Social Impact Navigator is divided in three major parts – *Planning Results*, *Analyzing Results* and *Improving Results* – which in turn, are composed by a few subparts. Overall, it is a similar model to the one developed by EVPA (2015) – although composed by more steps – that should be undertaken in order to conduct a project in an impact-oriented way. (*Appendix 2*)

The NPC, a registered organization that over 15 years has been advising charities, social enterprises, grant-makers, donors and corporate clients, has been gaining knowledge and reasons to believe that impact measurement is a way for IVs and its funders to increase their effectiveness (Kazimirski & Pritchard, 2014). Therefore, NPC developed a four pillar approach that outlines the key steps in approaching impact measurement: *mapping the Theory of Change*; *prioritizing what to measure*; *choosing the level of evidence*; and *selecting sources and tools*.

Lastly, David E. K. Hunter in his *Practical Guide to Performance Management* defines impacts as outcomes that can, through the use of experimental research methods, be attributed to the effects on participants of a program or service (Hunter, Working Hard & Working Well, 2013). The author suggests that in order to perform "reliably, effectively, sustainably, efficiently and at a high level of quality" an IV should take four days of intense retrospective. Hence, he proposes a *Four-Day Workshop*, where a specific plan is structured for each day: day one – mission, key strategic goals, objectives and target and service populations; day two – intended outcomes and respective indicators; day three – codification of programs and services; and day four – performance management. According to Hunter (2013), performance management is about creating the conditions to accomplish the organization's strategic interests, reason why it is a task of ultimate importance in any organization.

Case Study - Just a Change
Poverty Housing Context
There is no standard definition of "poverty housing" but it can be seen as the absence of "adequate housing" that is defined as "the right of everyone to an adequate standard of living for himself and his family, including adequate food, clothing and housing, and to the continuous improvement of living conditions." (United Nations, 1966) In other words, adequate housing stands for "a place to live in peace and dignity" and thus, poverty housing refers to a deficiency in that condition. The

United Nations' definition of poverty recognizes that poverty is multidimensional, with housing poverty as a separate category that can affect - and be affected by - other aspects of a family's life.

According to a Portuguese newspaper named *Expresso*, (Soeiro, 2016) a recent study conducted by the Energy Poverty European Commission reveals that 23.8% of Portuguese people cannot heat their houses and 28% of them live under damp, infiltrations and holes in the windows, which are responsible for the high number of slow and silent deaths during the winter in Portugal. According to a recent article, these deaths contribute to the 28% rate of Excess Winter Mortality in Portugal, contrasting to the 15% rate of the EU (Bloco de Esquerda, 2017), making Portugal the second worst country in the EU, only after Malta, to live in an inadequate house, during winter season. Adding to these frightening numbers, there are hundreds of others who, in spite of not being under a "life or death" situation, live under miserable conditions, which constraint their personal development as human beings and marginalize them from the society. Those individuals are the reason for *Just a Change* to exist, presenting a solution to this situation that is described in the next few lines.

Just a Change
Just a Change (*JAC*) is a Non-Profit Association that aims to tackle the poverty housing problem. Convicted that "home is the person's most important place in the world" and moved by the impressive aforementioned numbers about Portuguese poor housing conditions and mortality rate associated to them, the Association strives to change this situation. This way, *JAC*'s rehabilitates the houses of those who live under housing poverty and have no monetary conditions to move out of this situation. The Association mobilizes young volunteers to accomplish their mission, while increasing this way the sense of responsiveness and solidarity among the youth generation.

JAC is under an action plan called *Reabilita +* which is a growth and scalability project that started in 2015 and will take place until 2020. This plan is composed by three programs – *Reabilitar a Cidade*, *Portugal Rural* and *Just a Team Building*. *Reabilitar a Cidade* aims to rehabilitate houses in poor conditions in urban areas like Lisbon, Oporto and one other big city to be chosen. This

program is the main form of intervention of *JAC* once it occurs during the entire year. In turn, *Portugal Rural* is set to rehabilitate houses in rural areas of Portugal and takes place in the summer, with summer camps of intensive work that last ten days each. Lastly, the *Just a Team Building* works as a parallel program, which business model was designed to generate revenues for the feasibility of the other two programs, which are the core activities of *JAC*.

In turn, the operational model of *JAC* is divided into four main activities: signalizing the interventions, mobilizing resources for the interventions chosen, the intervention itself and technical follow-up post intervention. Along this process, there are intended outcomes expected to occur at two levels – at the level of the volunteers and of the beneficiaries. Those will be mentioned afterwards in this paper, however they include promoting the volunteering among the youth, contributing to a more solidary society, strengthening the well-being and health conditions of the beneficiaries, contributing to their personal and familiar development, fighting against their isolation and social exclusion and overall, promoting dignity.

In order to be able to produce this change at the society, innumerous resources are allocated to *JAC* business model. *JAC*'s partners are of great importance, once they allow the functioning of the business, along with a team that works full time at the Association. The main partners to be mentioned are the suppliers to whom *JAC* buys at a discounted price the raw materials; the funders, who contribute not only with money but also with expertise in the field of social work; the local councils that signalize the beneficiaries in most need and give *JAC* the information about them; the colleges that help in the mobilization of volunteers; and the architectural offices that provide counselling to the interventions.

The revenues' model is being developed in a way that sustainability can be assured in the short run. The Association's revenues come mainly from the local councils that pay a fixed amount per year for the intervention of *JAC* to happen inside of its geographic area; from the fees payed by the

volunteers at the beginning of the each semester, covering equipment and health insurance; from team building activities contracted by external corporations; and finally from the donations assured by the donors.

Until the moment, the Association has achieved *great outputs* as *JAC*'s board directors put it. (***Appendix 3***) In fact, the numbers are impressive and the informal feedback from the beneficiaries has been very positive. However, *JAC* is striving to understand whether its positive outputs have been driving a positive change in the beneficiaries, in the volunteers and therefore, in the overall society. As a result, *JAC* is very motivated to set its first steps into impact measurement.

Benchmark

In order to understand the best way to measure the impact of *JAC*, a benchmark should be conducted. Benchmarking is an important process for an organization that strives to improve performance at a low risk, since performance measurement and benchmarking are both methods that can assist in hazard control by revealing opportunities for process improvement. (Carder & Ragan) For *JAC*, the present benchmark has three main purposes: understanding which of the good practices that are being implemented by other organizations should also be implemented by *JAC*; saving the associated costs of trying something for *JAC* that has already been proved to be a failure by another entity; and finally, understanding how *JAC* can differentiate itself from other IVs, by doing something that is not yet done by others. Four main topics were defined as key to benchmark for the current purpose of social impact measurement: the business model, the volunteering management system, the practices that lead to high impact in the poverty housing sector and finally, the impact measurement model, where the focus will be on intended and achieved outcomes and impact, so that it can be used as evidence for *JAC*'s intended impact as well.

Business Model
The IVs working to tackle housing poverty used in the present benchmark analysis were *Habitat for Humanity*, *The Fuller Center for Housing*, *TECHO*, *Rebuilding Together* and *Reparar*, for their

similarities with *JAC'*s scope of action and at the same time, for their differences in the business models, which should be considered as possibilities to maximize the social impact of *JAC*. The description of each business model can be consulted in the ***Appendix 4***, while the main variables changing among the business models are the following: the signalization process – whether the beneficiaries are chosen by the IV, by any partner entity or even if they apply by themselves to the program; in any case, whether the selection process is categorical[1] or not and if so, what conditions are required from beneficiaries to fulfil; whether the service is totally free, or if it has an associated cost[2] for beneficiaries that can range from the contribution of working hours – known as "sweat equity" – to a percentage or the totality of the house cost; whether the IV only focus on housing rehabilitation or if it offers additional services that, together with housing, are crucial for the individual's transformation required to step out of poverty.

Volunteering Management System

JAC's activities depend on volunteers to be accomplished. Besides, being one of the goals of *JAC* to promote solidarity among youth, through volunteering, it is crucial for the Association to learn how to efficiently manage the volunteers in a way they feel motivated, engaged and committed to *JAC*, willing to keep on volunteering in their future. The *Canadian Code for Volunteer Involvement* is written for boards of non-profit groups to prompt discussion about the role volunteers play in their organizations, how they are engaged, and how they are supported. This way, it becomes crucial to look at the main ideas that urge on this *Code* – presented in the next table – about volunteering management best practices in order to apply them to *JAC*.

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[1]Take up Problem – there are 2 types of errors associated with the categorization of the beneficiaries: Type Error 1: people who are not needy and are receiving the help; Type Error 2: people who are needy and are not receiving help. By making the service categorical, type error 1 decreases. However, type error 2 increases, and the other way around.
[2] Whenever the intervention is subject to a monetary cost to the beneficiary, other services have to be provided like access to no interest loans, microfinance, or other kind of financial help.

Volunteering Management Practices
1. Showing Commitment from top – at JAC, from the board members and coordinators
2. Orienting and Training Volunteers
3. Defining policies that ensure everyone is treated consistently and fairly
4. Making the volunteers feel they belong and they are valued
5. Managing volunteers' expectations
6. Having a well-defined recruitment process and job descriptions

Table 2: Volunteering Management Best Practices, by *The Canadian Code for Volunteering Involvement*

Practices that lead to High Impact

From the benchmark conducted to the aforementioned IVs, there are some practices that excel for suggesting a high impact on beneficiaries. The ones that were found relevant for *JAC* to consider in order to increase its impact are presented in the next table and described in detail in the **Appendix 5**.

Benchmarked practices that are considered to increase the social impact of IVs working in the same field of JAC
1. Cooperation through partnerships
2. Providing free online information
3. Overall community intervention
4. Gathering data to create awareness
5. Targeting people with physical special needs
6. Investing in Ecological solutions
7. Ask for *sweat-equity* from the beneficiaries

Table 3: Practices that lead to high impact

Social Impact Studies

The majority of the IVs working on housing only present the so-called *outputs* as results, and not *outcomes*, neither *impact*. In fact, the expressed "impact" from the majority of the IVs is translated into the number of volunteers gathered, the number of houses rehabilitated as well as the number of families helped, which are drivers of change but not the end change in itself. However, it is not the case of *TECHO* nor *Habitat for Humanity of Greater Indianapolis* (*HFHGI*), that conducted impact studies on their intervention, both revealing causal links between certain contexts and a variety of effects, as well as explaining, based on evidence, how small solutions can lead to certain outcomes. Both studies are interesting research tools for the goal of the current paper, in the sense that, the

outcomes and impact proved to be achieved by the two IVs, work as evidence for *JAC* to consider such outcomes and impact as expected to happen as well. The following table presents a summary of the main intended outcomes and impact achieved by these two IVs. However, detailed information on these studies can be found in the ***Appendices 6, 7, 8*** and ***9***.

	Intended Outcomes	Results on Impact
HFHGI	• Health benefits · Mental · Physical • Lowered levels of stress • Assuring intellectual development and lifetime achievement of children • Increase in lifetime earnings • Increase in life expectancy • Increase in the overall quality of life	• Total Benefits released · Each successful placement of one Habitat partner family results in an estimated $330,054 to $447,349 • SROI · For every dollar *HFHGI* spends placing its families, a total of between $1.92 and $2.61 in benefit may be realized (Marron, 2012)
TECHO	• Satisfaction with the house • Overall life satisfaction • Security • Assets' possession • Labor supply and child health.	• Positive effect on the quality of housing and on general wellbeing • Reductions in the incidence of diarrhea • Security improvements • Satisfaction • Quality of life

Table 4: Summary of the main intended outcomes and impact achieved on the Impact Social Studies conducted by *HFHGI* and *TECHO*

Model of Social Impact Measurement for Just a Change

Having in consideration the recognition of the NPC in the area of impact measurement and how well it fits *JAC*'s current needs, its model – the *Four Pillar Approach* – will be followed in designing *JAC*'s impact measurement model. The four pillars of this approach involve:

1. Mapping the Theory of Change

2. Prioritizing what to measure

3. Choosing the level of evidence

4. Selecting sources and tools.

1) Mapping the Theory of Change

As explained previously, a Theory of Change (ToC) is a comprehensive illustration of why a desired change is expected to happen in a certain context. For *JAC*, it is the map that explains which interventions are required to create the outcomes that will lead to *JAC*'s ultimate goal. This is done by first identifying the desired long-term goal (impact) and then works back from this to identify all the conditions (outcomes) that must be in place – and how these are expected to relate to one another causally – for the goal to occur. Afterwards, the resources (inputs) and interventions (activities) needed to generate the outputs that will lead to the aforementioned outcomes, are drawn in a framework called *Logic Model*, which together with the desired outcomes and impact, forms *JAC*'s ToC, presented below.

Theory of Change - JAC					
Inputs	**Activities**	**Outputs**	**Outcomes**		**Impact**
			Beneficiaries	**Volunteers**	
Board of Directors	Building awareness	Community Awareness Raised	Security & Safety	Solidarity	Transforming Lives by promoting Dignity - through Volunteering and House Rehabilitation
			Savings		
Partners	Mobilization of Volunteers	Civic and Social Engagement	Community environment		
			Self-confidence	Friendship Bonds	
			Self-esteem		
Staff (know-how)	Mapping and identification of vulnerable houses and households	Fun, dynamic and original volunteer work	Comfort		
			Better Hygiene	Empowerment	
			Health Benefits		
Volunteers (Work-force)	Rehabilitation of Houses	Relationships established	Empowerment		
			Social Inclusion	Well-being	
Materials	Monitoring and follow-up with stakeholders	Houses Rehabilitated	Reduced Loneliness		
			Well-being		

Table 5: ToC of JAC, developed during a workshop that took place on 2nd April, 2017 with JAC's Board of Directors

The ToC presented above was built during a workshop conducted in the beginning of April, 2017 with the board of directors, aiming at building *JAC*'s ToC. From it, one can easily identify what *JAC* defines as its intended impact or ultimate goal – "transforming lives by promoting dignity, through volunteering and house rehabilitation". Although not explicit in this impact formulation, *JAC* intends to transform the lives of two main targets – poor households (the beneficiaries) and young volunteers. Therefore, *JAC*'s impact assessment will always need to have these two target levels in consideration.

The outcomes will lead to *JAC*'s intended impact and therefore, they clearly explain the type of "life transformation*"* *JAC* intends to produce on people's lives. Moreover, *JAC* considers "promoting dignity" as its ultimate goal of life transformation and sees it as a consequence of a combined realization of all the other intended outcomes. Those are expected by *JAC* to occur, based on *JAC*'s perception of its intervention's effects – on beneficiaries and on volunteers – during its past seven years of activity. However, these perceptions may only act as a departure point for analysis – they cannot infer causality. Therefore, in order to build a reliable model on impact measurement, the expected outcomes have to be based on evidence about the effects of housing on people. This way, research was conducted, aiming to validate the links between housing conditions and each of the intended outcomes prioritized by *JAC*, and from this process, a final selection and prioritization of outcomes to measure was agreed.

2) Prioritizing what to measure

In order to make sure that such outcomes are achievable, *JAC* has to guarantee that the outputs are being achieved. Actually, only if the housing conditions are improved, the beneficiaries can be safer, feel more comfortable and perceive health benefits in their lives. In the same way, only if the awareness about housing poverty is raised, the volunteers will be empowered to fight against this problem and to realize the need of being solidary. This way, it becomes crucial to measure not only the aforementioned outcomes, but also the outputs considered in the ToC, as a way of assuring the outcomes' realization.

The research conducted, presented in detail in the ***Appendix 10***, found evidence on the majority of the links between housing conditions and the realization of some specific outcomes suggested by *JAC*. It also suggested a connection between some of the outcomes studied, which helped in the process of merging them, as a way of shrinking the analysis. This research, together with the prioritization of *JAC*, allowed a final selection of the outcomes to be measured in the model being currently developed. This way, from the twelve intended outcomes, suggested by the Board –

presented in the ToC – at the level of the beneficiaries, a selection of five final aggregated outcomes to measure was achieved, while from the initial four outcomes suggested at the level of the volunteers, all were kept as prior to measure. This way, the current model will measure nine aggregated outcomes – five at the beneficiary's level and four at the volunteer's, presented below.

Beneficiaries	Volunteers
1. Security & Safety 2. Comfort & Well-being 3. Health & Personal Health 4. Self-confidence, Self-esteem & Empowerment 5. Social Inclusion, Reduced Isolation & Community Environment	1. Solidarity 2. Friendship Bonds 3. Empowerment 4. Well-being

Table 6: Final aggregated outcomes that will be measured by the model being currently developed

3) Choosing the Level of Evidence

Having established *what* to measure, it is time to define *how* to measure it. Having in consideration the information gathered from the literature and from the benchmarked practices on social impact, the current context of *JAC*, its availability of resources and its intended level of evidence on results, a qualitative method of analysis, seems to be what better applies for *JAC*'s initial steps into impact measurement. Specifically, the impact on both targets – beneficiaries and volunteers – will be measured through the implementation of surveys, conducted at different life times, as a way of capturing effective change and drive conclusions on impact. This way, each survey acts as a tool for understanding whether the intended outcomes are being achieved or not.

The first step on building the surveys involved selecting key indicators for each outcome, in order to build questions, afterwards, according to each indicator and altogether drive conclusions on each outcome realization. Finally, the realization of all outcomes together, allows conclusions on impact.

Beneficiaries' survey

The survey to evaluate the impact on the beneficiaries (*Appendix 11*) was built based on the inputs (indicators; question formulations; range of answers; ways to address the respondents) of two reliable sources on housing and poverty: an Eurostat databased Survey on Income and Living Conditions (SILC) (European Comission, 2016) and Martin Ravallion's book *The Economics of*

Poverty (Ravallion, 2015). The goal of this survey is to test whether the beneficiaries perceive a change in their lives, at the five outcomes' levels being studied. In order to understand whether such change verifies or not, the exact same survey will be answered twice by each beneficiary: once, before the intervention of *JAC* starts and the second time, twelve months after the intervention finishes. The reasoning behind these timings is that in order to measure change – driven by a specific action – there has to be data collected on the beneficiaries' aspects that are being studied, prior to the intervention, in order to be used as a baseline to compare to the final – and, ideally better – situation, when the intervention is finished. However, it would not make sense to expect any change in the beneficiaries to verify at the outcomes' level at the precise moment the intervention of *JAC* finishes: one can expect outputs to verify at that time – and those should be measured then – but outcomes need time to realize because people need time to experience effective change in their lives. In fact, something like *satisfaction* can definitely – and most probably – be felt by beneficiaries at the moment they are gifted with a new house, but *JAC* aims more than satisfaction – which is only temporary – on its beneficiaries. *JAC* expects that such satisfaction can be translated into something bigger, not temporary that will allow change – like better health, social inclusion and self-esteem, among others – on its beneficiaries' lives. Moreover, if such change is expected to verify as a consequence of *living in better housing conditions*, then time spent living in such better conditions is required. Therefore, although ideally impact is measured in a longer-run, twelve months are considered to be time enough for the beneficiaries to perceive some change driven by a new daily-life at a better house and, at the same time, not long enough to make it hard to assure a follow-up to the beneficiaries. Additionally, for acknowledging that the target of these surveys will be low instructed people, probably not able to read nor to write, the implementation of the surveys will require that someone – either from *JAC* or from a partner institution in charge of measuring the impact – is conducting the survey, in person, to the beneficiaries in order to avoid possible misunderstandings of questions and assuring therefore, the reliability of the survey.

Volunteers' survey

The volunteers' survey aim to measure the impact *JAC* has on the lives of its volunteers. Following the same reasoning of the beneficiaries' survey, the questions were built based on the indicators that allow measuring change on each of the four intended outcomes at the volunteers' level – *solidarity*, *friendship bonds*, *empowerment* and *well-being*. Given the lower complexity and shorter dimension of the volunteers' surveys, the easiness on keeping track of the volunteers in the long-run (through an e-mail), as well as their higher level of education, that allows an autonomous and online completion of any survey, volunteers will be asked to answer three different small surveys, at three different times, being one of them in a long-run, as impact measurement suggests. Given the current lack of performance management (outputs' measurement) conducted by *JAC* at the volunteers' level, these three surveys are aimed at measuring more than just impact: they try to measure not only the aforementioned outcomes that lead to impact on volunteers, but also *expectations match*, *awareness raised* and *satisfaction* that are, definitely, important to analyze as a way of better managing the volunteers and allowing for a higher impact of *JAC* in their lives.

This way, the first survey – entitled "Just before starting" (***Appendix 12***) – will be applied once, to all new volunteers who are about to start any program at *JAC* – only those who will volunteer at *JAC* for the first time. It is a very small survey, particularly aiming to understand the volunteers' expectations and reasons to apply for *JAC*. The second survey – named "Just after evaluation" (***Appendix 13***) will be implemented to all volunteers, every time a program finishes (at the end of the semester/ *Bootcamp* season/ summer camp) with the main goal of assessing performance. By measuring the outputs (at the volunteers' level) of the specific program – like whether the expectations were met; whether the volunteers are satisfied; whether awareness on poverty housing and on volunteering is raised – *JAC* will allow the outcomes to verify. However, although being implemented at the moment the program finishes, this second survey already allows for some conclusions on impact to rise: contrarily from what is reasonable to expect in the beneficiaries'

case, at the end of a program, the volunteers may already – and it is probable to happen – perceive some changes in their lives (outcomes verification). This is because at the end of a program, the volunteers have already been going through the *volunteering* experience, which is the activity that will drive change in their life, while the beneficiaries have not been through *living in a good house*. Finally, the third survey – entitled "Just 2 impact" (***Appendix 14***) will be conducted to ex-volunteers, who are no longer volunteering at JAC for at least two years. The goal of this final survey is essentially to detect change that lasts in an individuals' life, and therefore to understand what is the impact of *JAC* on its volunteers, in the long-run.

4) Selecting Sources and Tools

After defining the tools – the beneficiaries' and the volunteers' surveys – to measure the intended outcomes and presenting how they should be implemented, it is time to go through the surveys, understanding what questions are contributing to which outcomes and defining a method to analyze the answers in order to drive conclusions on impact.

Methodology of Analysis

Both surveys assume very different shapes, as mentioned before. One additional different aspect to have in consideration is that the impact on the beneficiaries will be assessed based on the differences in the answers taken from the exact same questions at different life-times, while the impact on the volunteers will be measured through different surveys, addressing different issues and asking more direct questions on perceived impact. However, overall, both will follow the same methodology of analysis, described in the *Excel* file attached to the present paper.

Also, both surveys present more questions than the ones contributing directly to each outcome. Among other reasons particular to each survey, the overall idea behind this is that data is never too much: even though it might seem irrelevant for now, it can be very useful in the future. In turn, the beneficiaries' surveys contain questions that address crucial information like background, family composition, education levels and household income that although not explaining directly an outcome, may help understanding the beneficiaries' context and the variables' behavior. Besides

that, as mentioned already, change (the outcomes realization) is only possible whenever the outputs are achieved. Therefore, measuring *JAC*'s output achievement (performance) is crucial for impact measurement to take place. This issue is being tackled by the volunteers' surveys that contain questions meant to measure outputs. However, the same does not apply for the beneficiaries' surveys, for considering that the outputs at the house level – whatever changes in the house, through the rehabilitations – have such an important role in the attainment of any outcome, that its assessment should not be done together with the beneficiaries' changes, but separately and by an expert at house conditions. Those housing outputs are currently being measured by *JAC* through a *House Evaluation Sheet* (**Appendix 15**).

The first step on analyzing the surveys is to form groups of questions that contribute to each outcome. So, for the beneficiaries' survey, given the five aggregated outcomes being measured, five groups of questions were formed. (**Appendix 16**) The same method was applied to the volunteers' surveys. However, once the volunteers' surveys aim to measure more than the outcomes, more than four groups were formed – and different per survey, given the different variables being studied per survey. (**Appendices 17A, 17B** and **17C**) Afterwards, the adequate attribution of weights to each question, within each group, takes place. For the beneficiary's survey, each question contributes with the same weight to each outcome[3]. This is because there is no sufficient knowledge at the moment to consider some questions more important than others for the realization of any of these outcomes. However, the volunteers' survey considers some questions to have more weight in each outcome variable explanation. This happens whenever the question directly asks the respondent if *JAC* has really contributed, at least in part, to such outcome realization – accounting for the *deadweight* and possible *attribution* of others. Apart from these questions, all others are worth the same for the realization of each output and outcome.

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[3] For instance, if an outcome is being measured by 4 questions, each question will be weighted 0.25 of the final score on that outcome.

In what concerns the type of data being analyzed, all variables taken into account for the analysis are discrete (no open-questions). However, there are different ranges of answers, which involve different attributions of scores per answer. This way, all answers will be scored between 0 and 1, where 1 will always stand for the best possible option and 0 for the worst[4]. These scores will then contribute to the total final score of each outcome, also between 0 and 1. Each outcome final score will be the driver of conclusion on the outcomes achievement – whenever the score increases from the first to the last survey, there are reasons to believe that such change in outcome can be, at least in part, attributed to *JAC*. In turn, conclusions on the overall impact on each individual – beneficiary or volunteer – can be inferred by simply merging the scores per outcome into a total new score, according to each outcome's weight for the overall impact, which for now will be assumed to be the same for all.[5]

Through this method, *JAC* will be able to identify whether there is a change (ideally, an increase) in scores per outcome and per individual. By measuring such change, *JAC* is measuring its impact. Indeed, if an increase in the outcomes' scores verifies, there is suggested evidence on the positive impact of *JAC* on its targets' population. In order to better visualize the impact on each individual – beneficiary or volunteer – the final scores will be transferred into stars, where each axis corresponds to an outcome. This way, three stars will be designed: one for each house – to be developed by *JAC*; one for each beneficiary and one for each volunteer. This method of presenting the results allows a graphical interpretation of the impact, which is easier to interpret. A clear explanation on how the results are presented in the stars and on how to interpret them is presented in the ***Appendix 18***.

Caveats of the Model

Although a pilot was conducted in order to test the clarity and meaningfulness of the questions, it could not infer conclusions about change (impact) for the simple fact that there is no baseline

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[4] For instance, if a question asks the respondent to rank his/her perception of comfort from 1 to 6, where 1 stands for "extremely uncomfortable" and 6 for "extremely comfortable", option 1 scores 0; option 2 scores 0.2; option 3 scores 0.4, (…) and option 6 score 1. In the same way, whenever a question asks for a *yes* or *no* answer, option *yes* scores 1 and option *no* scores 0.

[5] 20% for each outcome at the beneficiary level; 25% for each outcome at the volunteer level.

survey to be used for comparison between the current and a previous situation, at the pilot. Therefore, it is important to recognize that the surveys designed, although based on reliable sources and designed with the supervision of specialists on poverty measures, may need to be adapted, as implementation takes place. For instance, as the surveys are implemented, it can be realized that some important indicators are missing and therefore should be included in the analysis, while some others might be suggesting being ineffective and consequently should be eliminated from the survey. However, in what concerns the type of questions, it might be important to mention that some of the questions may seem to be repetitive or addressing the exact same indicator, but it happens on purpose, as a way of assuring the reliability of the survey, checking for coherence among the answers. Another important caveat to consider is that, all answers are based in self-reported data, based on the perception of the respondents that might change according to his/her personality traits or negative dispositions at the day the survey takes place. One last caveat to be considered is the weight attributed to each question and to each outcome on the overall impact – that, except to one specific question of the volunteers' survey, is considered to be the same for all questions and outcomes realization. At the moment, before implementing the survey, any other assumption would make sense, for not relying on any learnings or conclusions on the surveys. However, it is recognized that these weights are susceptible of change if, along the implementation, such adaptation appears to be reasonable.

Recommendations

Evaluating impact is never easy: it requires effort from all stakeholders in order to be well implemented and therefore *JAC* has to be truly committed towards impact measurement in order to motivate and engage all stakeholders along the process. This involves, in first place, to assure someone from staff team is in charge of impact measurement. It can be either someone new, hired for such purpose, or someone already working at the team who will be in charge of this new management pillar. Regardless of whether *JAC* decides to allocate someone from a partner entity –

perfectly recommended – considered more adequate to conduct the surveys to the beneficiaries, still there has to be someone at the team assuring such job is being done: someone accountable for impact management, in charge of adapting possible pitfalls on the model, sending the surveys online to the volunteers at the required different times, transforming data into relevant information, evaluating the results to infer conclusions on impact, using the results to improve performance and, overall, motivating the different stakeholders to engage on the process. In fact, for acknowledging that the surveys are demanding (in terms of size – for the beneficiaries and frequency – for the volunteers), the need of applying such tools has to be not only recognized by *JAC*, as its value has to be passed along to the beneficiaries and volunteers in order to facilitate their cooperation.

In what concerns, the beneficiaries' survey, it is recommended, as mentioned before, that someone is conducting the survey in order to avoid misunderstandings of questions and to register informal (not directly asked) data. Ideally, this person should be someone from a partner entity – the local council/parish/social assistance – with information on the beneficiary's background and more importantly, with experience on social/psychological work. Moreover, it would be very helpful to conduct an informal interview to someone close to the beneficiary (a family member, a neighbor or a friend) in order to validate impact – it would allow having a second opinion on the life changes of the beneficiaries. However, it should always be kept clear that *JAC*'s goal is to have an impact in the life of its beneficiaries. Thus, the change the beneficiary perceives in his/her life, although mentioned as caveat of the current model, is what really matters, regardless of whether that change is perceived by someone else or not. Also important to mention is that measuring performance has to be assured by *JAC* before starting to evaluate impact. Accordingly, it is highly recommended that the *House Evaluation Sheet*, developed by *JAC* – suffering improvements at the moment – is always used as a basic and crucial tool that accompanies the rehabilitations of *JAC*. This sheet, filled in before the intervention starts and just after its end, will be used to evaluate change at the house level, and therefore it will be crucial to infer conclusions on the impact of housing conditions on the

life of individuals. Finally, no matter what the results may tell, it is crucial that *JAC* remains faithful to impact measurement and does not try to shape the model in order to get more appealing results. In fact, understanding the real impact – not a fake one – of *JAC* is the goal of impact measurement, since it will lead to better performance and strategy alignment.

Conclusion

Impact measurement has the potential to help *JAC* changing lives by improving the way the organization works. Through the impact measurement model developed at the current paper, *JAC* will be able to understand whether – and to what extent – the intended impact on the beneficiaries and on the volunteers is being achieved. Based on the evidence that housing conditions drive a number of outcomes in the life of individuals, the model developed tries to detect change on 5 levels of the beneficiaries' lives – health and hygiene; security and safety; comfort and wellbeing; social inclusion and reduced isolation; self-confidence, self-esteem and empowerment. In turn, based on suggestion that volunteering drives change in people, the model measures whether *JAC* is contributing to a change in volunteers' lives – in terms of solidarity, empowerment, friendship bonds and wellbeing.

However, *JAC* should not be afraid of the conclusions that will arise from enrolling in such process. Instead, it should commit to impact measurement to the highest possible level and look at such conclusions – positive or less appealing – as a precious pathway that will allow *JAC* to deliver a better service (efficiency) that will drive a better change (effectiveness) on people's lives. Once *JAC* – as all other IVs – exist in order to tackle a specific problem and change a specific context, understanding whether that problem is being minimized and whether that context is being changed, becomes essential for the realization of its mission. Therefore, measuring impact should be a priority for *JAC* in order to understand whether the mission that justifies its existence is being fulfilled or not.

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