



社會影響力工作坊 (一)

社會影響力評估概述

林以涵 (Sunny)

2014.07.17



工作坊流程

- 1 Intro - 自我介紹
- 2 Why - 為什麼要衡量社會影響
- 3 What - 和衡量財務報酬大不相同
- 4 How - 認識 Impact Value Chain
- 5 When - 衡量社會影響力的最佳時機
- 6 Who - 有哪些組織已在運用此機制
- 7 Play - 不僅紙上談兵，帶你實作練習
- 8 Share - 常見參考工具與資源



自我介紹

- 1 介紹社企流/講者
- 2 姓名、就讀學校/工作單位、有趣經歷等
- 3 期待從工作坊中獲得什麼？

台灣第一個華文社會企業資訊匯流平台

社企流已擁有
96 個社企檔案
696 篇觀點分享
926211 位網站訪客
23780 位Facebook粉絲



台灣第一個以社會企業為主題的資訊平台
透過華文分享社會創新、社會企業各方面資訊
傳遞「用商業力量改變社會問題」的知識與智慧



2012年2月
網站上線

50位
志工夥伴

30場
實體活動

1000篇
網站文章

96萬名
網站訪客

3800位
活動參加者



Why - 為什麼要衡量社會績效與影響

Trust Me

- 1960年代
- 慈善(Charity)行為或事業

Tell Me

- 1960-2000
- 公益(Philanthropy)事業

Prove Me

- 2000-2013
- 公益創投(Venture Philanthropy)



Why - 為什麼要衡量社會績效與影響

- 1** 什麼是績效衡量 (Performance Measurement)
從質量和數量方面評估某種組織達到它們使命、目的、目標，行動步驟或達到希望標準的程度。
- 2** 什麼是社會績效衡量 (Social Performance Measurement)
將績效衡量機制運用於檢驗組織在社會及經濟上的影響力，並探討社會與經濟效益之間的關係。

其他名稱包括Social Impact Assessment, Impact Measurement, Social Return on Investment Evaluation



Why - 為什麼要衡量社會績效與影響

- 1** 改善專案管理；更有效率地規劃與評估
Improved program management
- 2** 增進了解工作所產生改變與影響
Increased understanding of impact of work
- 3** 強化與利害關係者的溝通
Stronger communication of value to stakeholders
- 4** 提升對社會、經濟、文化、環境等價值創造的關注
Enhanced attention to social, economic, cultural & environmental value created



What - 和衡量財務價值、報酬大不相同

簡單

衡量明確性

困難

- 銷售利潤
- 資本資產
- 投資報酬
- 分配股利
- 其他

- 商店信譽
- 保險費用
- 折舊價格
- 負擔債務
- 預期收益
- 減排信用
- 收入變動
- 潛在收入
- 求學機會
- 科技利益
- 其他

- 身體健康
- 人身安全
- 生物多樣
- 清淨空氣
- 乾淨水源
- 教育成果
- 政治穩定
- 文化促進
- 其他

- 生命
- 自由
- 尊嚴
- 快樂
- 其他



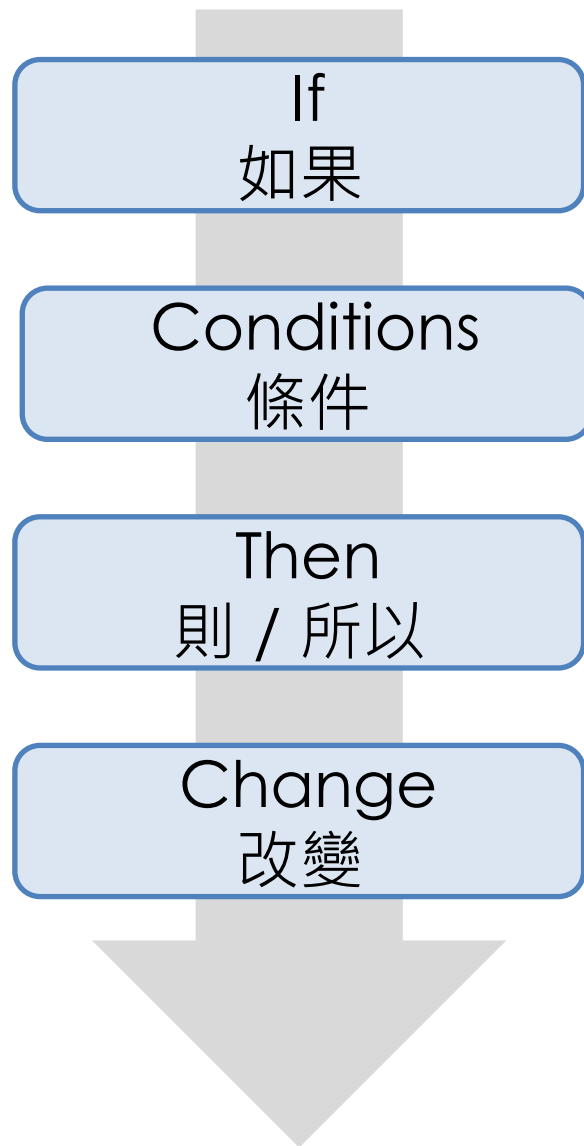
What - 和衡量財務價值、報酬大不相同





How - 認識改變理論 / Theory of Change

A tool for developing solutions to complex social problems. A basic TOC explains how a group of early and intermediate accomplishments sets the stage for producing long-range results.





How - 認識改變理論 / Theory of Change

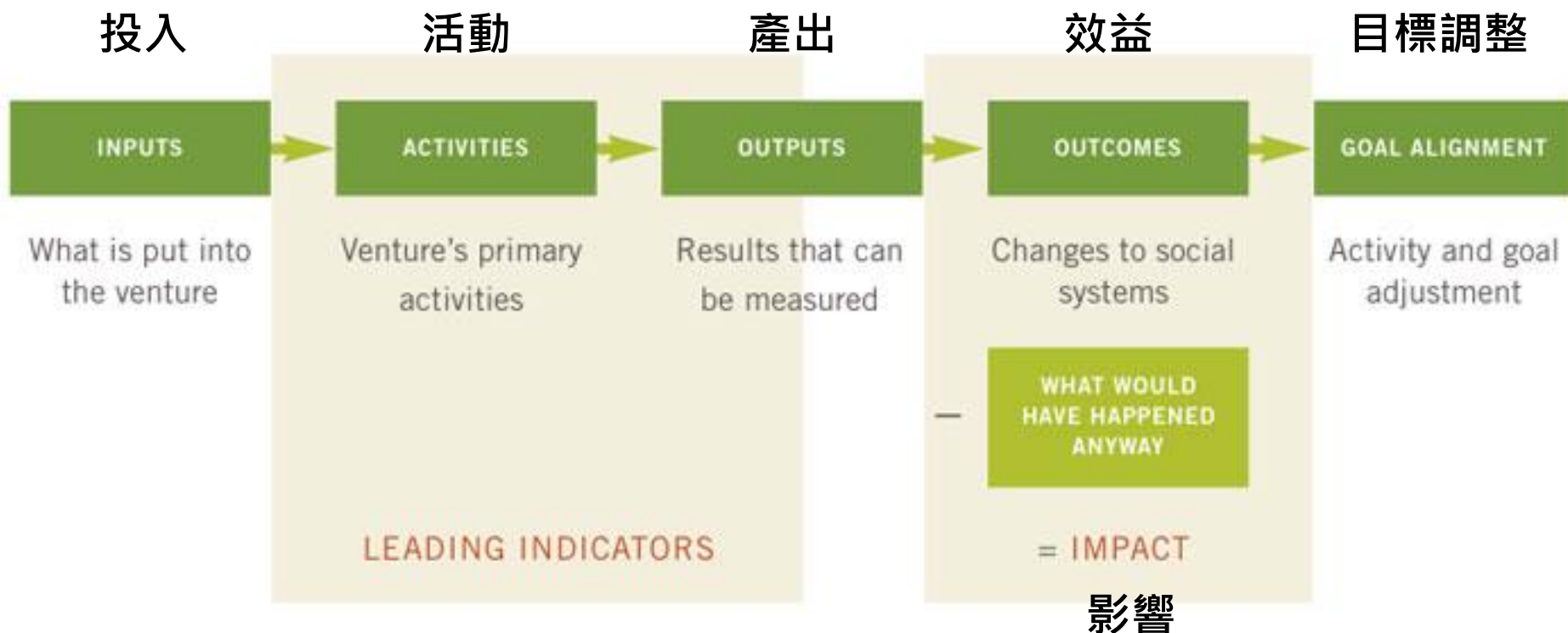
- **IF** rural communities can sell their local handicraft produce through an online e-commerce platform, there will be economic development in rural communities.
- **IF** low-income, marginalized teenagers have first-hand experience running a business, they will be more successful in their careers.
- **IF** customers' water usage is metered and they have to pay for it, they will use less water.
- **IF** people buy organic yogurt instead of non-organic yogurt that may be full of pesticides, their health will improve.
- **IF** jobs are created in low-income areas, personal well-being will increase and the quality of life those neighborhoods will increase.

Note: In the examples above, the ultimate social impact is expressed as a change, and increase or a decrease. This is the same thing as the social mission you are trying to achieve.



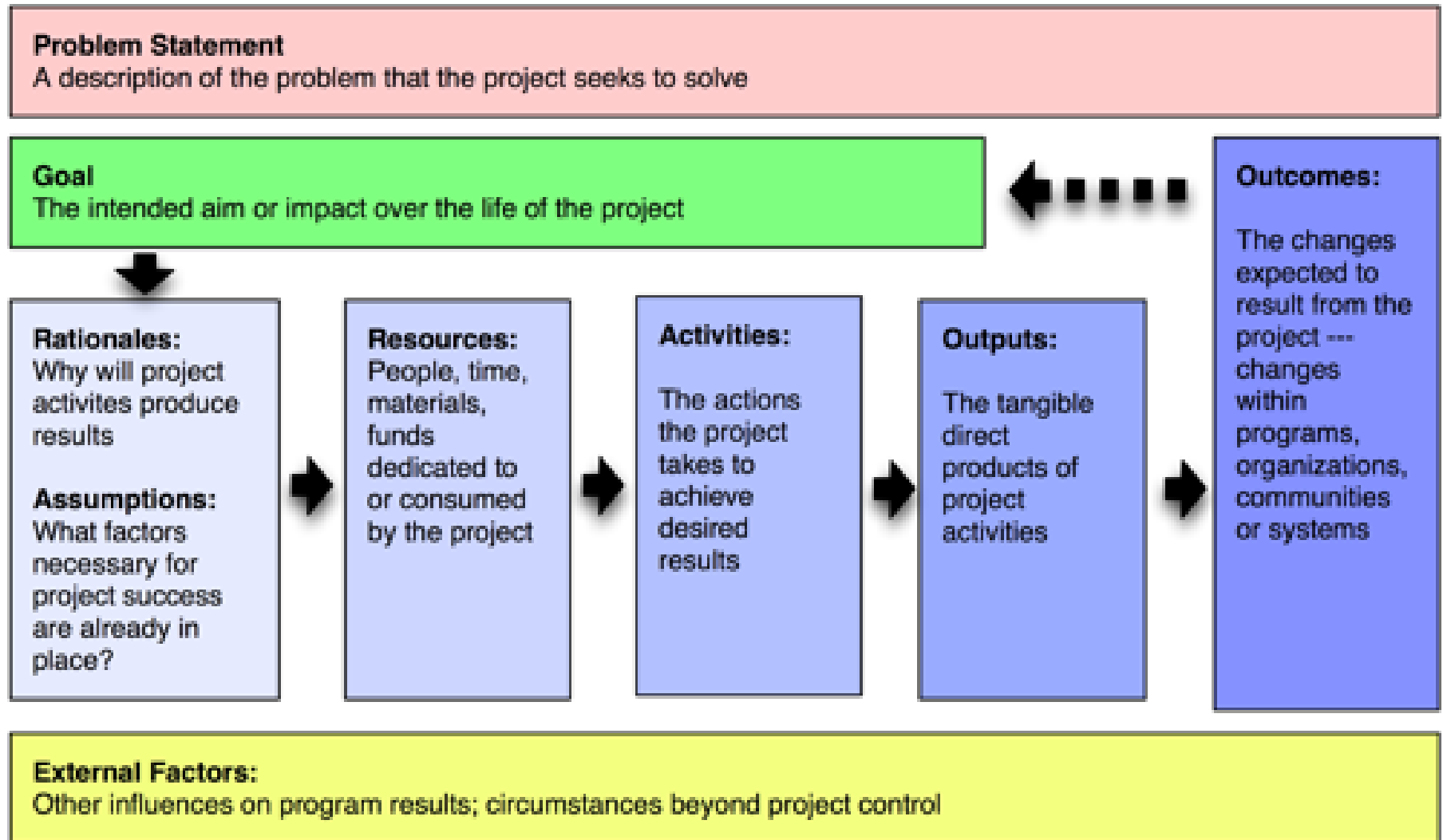
How - 認識影響力地圖 / Impact Value Chain

The Impact Value Chain is a tool that illustrates how the venture's activities lead to the venture's ultimate desired outcome and impact. The Impact Value Chain builds on your Theory of Change by articulating the relationship between the ventures activities, outputs, outcomes, and impact.





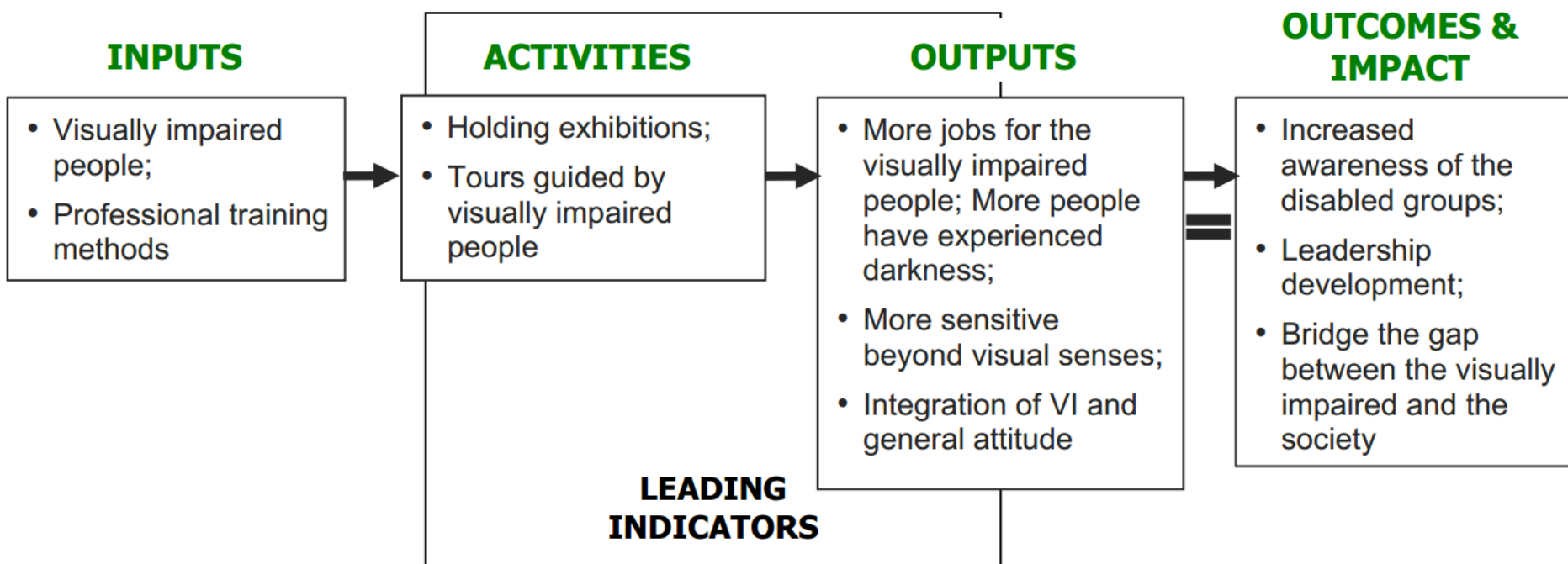
How - 認識影響力地圖 / Impact Value Chain





How - 認識影響力地圖 / Impact Value Chain

Illustrative Example: Impact Value Chain of Dialogue in the Dark

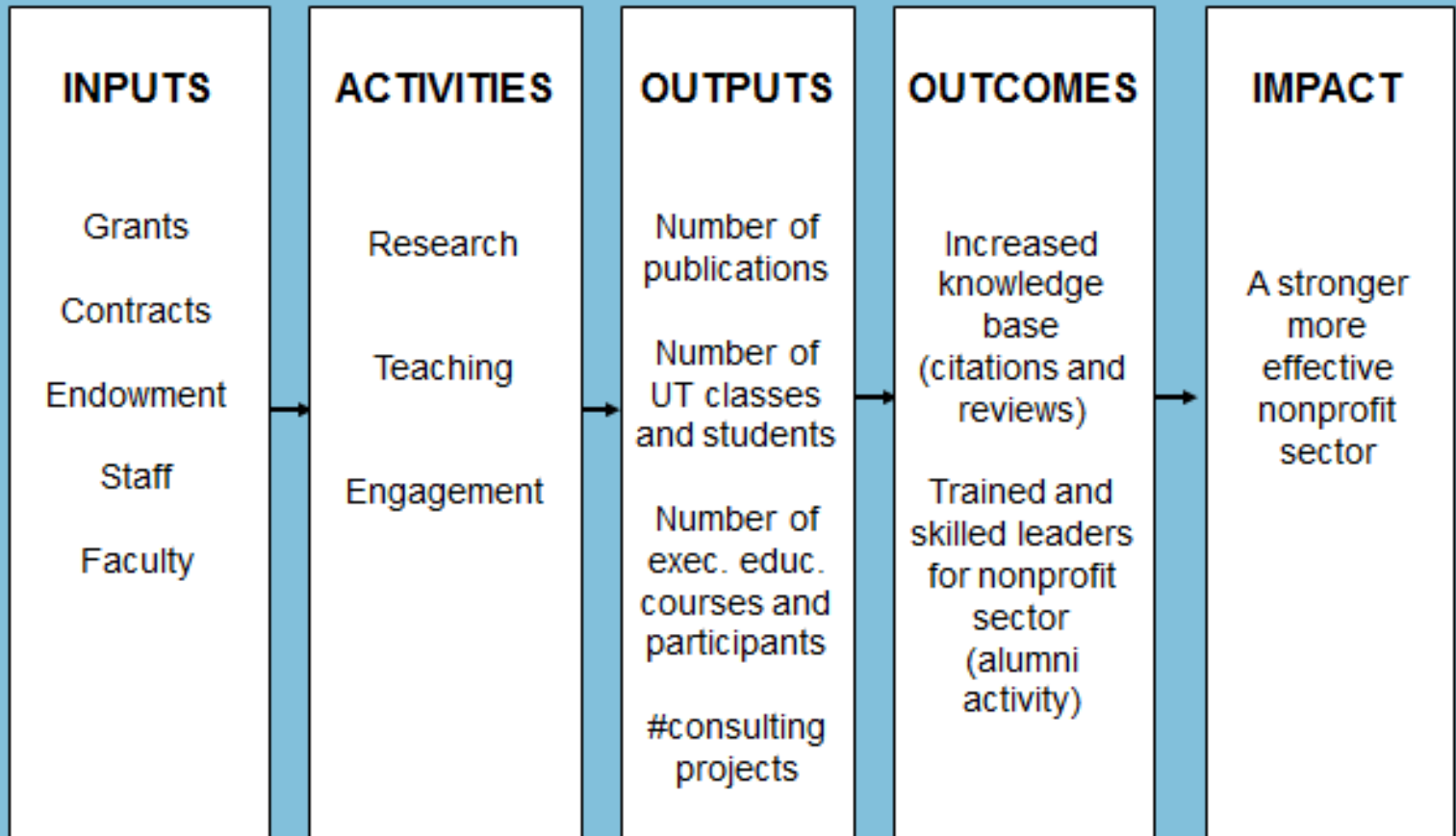




How - 認識影響力地圖 / Impact Value Chain

THE UNIVERSITY OF TEXAS AT AUSTIN

Example: RGK Center





How - 實作練習時間！



HP Global Social Innovation Early Infant Diagnostic Project



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How - 實作練習時間！

社會問題 (The Problem)

- 愛滋帶原寶寶若在出生後無即時診斷與治療，到兩歲的存活率只有五成
- 以往診療以郵寄處理成本高、時間長，愛滋媽媽不願犧牲工作時間、負擔旅費帶寶寶至診所看診

解決方案 (The Solution)

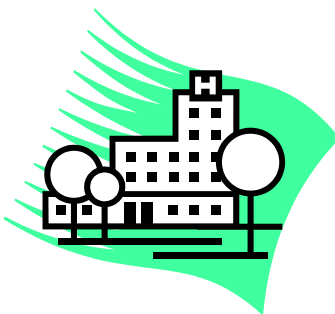
- 惠普提供可接收簡訊與上網的印表機給**1000**個偏鄉診所，並在**4**個醫學實驗室與肯亞衛生部設立資料處理中心
- 柯林頓健康倡議組織與當地大學合資提供移動醫療車與相關設備，至各地接收血液樣本
- 肯亞衛生部提供醫護、行政、新系統訓練等人力，處理診斷作業



How - 實作練習時間！



愛滋媽媽
與寶寶



小型診所
或醫療站



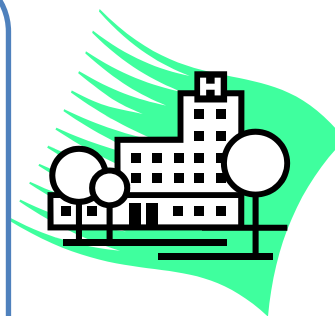
大型醫院
醫學中心



愛滋媽媽
與寶寶



支持單位
- 柯林頓
- 大學
- 衛生部



小型診所
或醫療站



支持單位
- 惠普
- 衛生部



大型醫院
醫學中心



How - 實作練習時間！

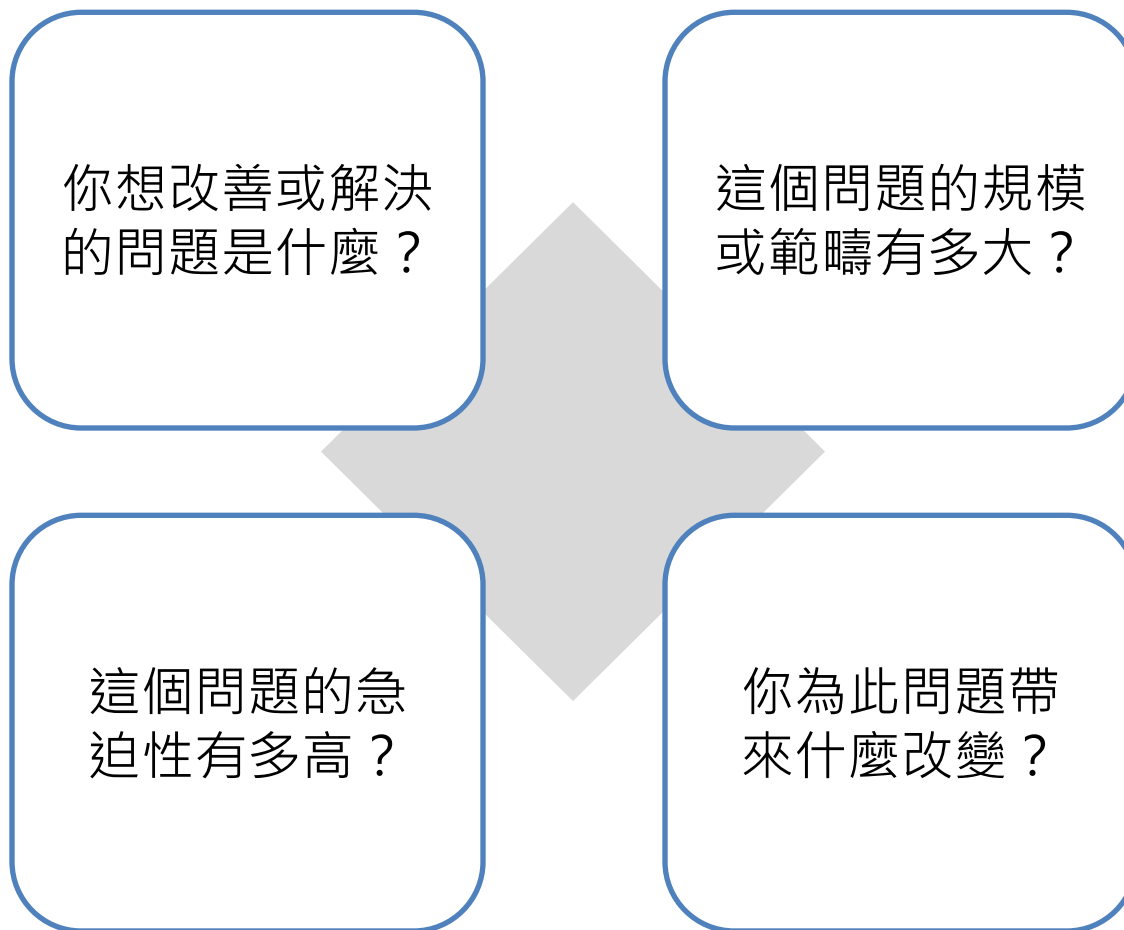
EID Project in Theory of Change

- 請分組練習建立此專案的改變理論
- 分成**4**組
- 討論時間**15-20**分鐘後發表
- 有任何問題都請隨時提出





How - 認識改變理論 / Theory of Change





How – 設計衡量機制

1

界定要衡量的改變

What is the change?

2

找出要衡量的對象

Who will you ask?

3

建構相關指標與問題

What questions will you ask?

4

考慮外部因素

Considering external factors



How – 常見衡量機制

衡量社會效益與影響力的工具有很多，英國NEF（New Economics Foundation新經濟基金會）就列出了至少21種工具，主要衡量品質、社會效益、策略三方面。例如：

- Balance Scorecard
- Progress out of Poverty Index
- Participatory Impact Assessment
- DTA Healthcheck
- Third Sector Performance Dashboard
- European Foundation for Quality Management
- SROI (Social Return on Investment)
- CESPI (Co-op, Econ & Soc Performance Indicators)

.....等等



How – Balance Scorecard

Financial			Mission		People	
Total	2007 Actual	Goal	2007 Actual	2008 Goal	2007 Actual	2008 Goal
Key Indicators			Clients		Staff and board	
			# of Client Sessions			
Revenues					# New board members	
Expenses			% of Repeat Clients			
Months of reserves					# Engaged board members	
			Client Demographics			
Ratios			% of Clients with HIV or AIDS		Staff turnover rate	
			% of Clients who are LGBTIQ			
Unrestricted / restricted funds			% of Clients who are adolescents		Therapist job satisfaction level	
Income generated by counselors as a % of salary paid to them			Client Impact		% of Staff working towards an advanced counseling certification	
			Average GAF score improvement			



How – Progress out of Poverty Index



India Progress out of Poverty Index[®] (PPI[®]): Scorecard

Indicator	Value	Points	Score
1. How many household members are 17-years-old or younger?	A. Four or more	0	
	B. Three	7	
	C. Two	11	
	D. One	17	
	E. Zero	26	
2. What is the general education level of the male head/spouse?	A. No male head/spouse	0	
	B. Not literate, no formal school, or primary or below	0	
	C. Middle	3	
	D. Secondary or higher secondary	5	
	E. Diploma/certificate course, graduate, or postgraduate and above	7	
3. What is the household type?	A. Labour (agricultural, casual, or other)	0	
	B. Self-employed (agriculture or non-agriculture), regular wage/salary-earning, or others	5	
4. What is the primary source of energy for cooking?	A. Firewood and chips, dung cake, kerosene, charcoal, coke or coal, gobar gas, or others	0	
	B. LPG or electricity	1	



How – 常見衡量機制





SROI – 社會投資報酬率介紹

The ratio of social returns to investment, which includes monetizing predicted future outputs and outcomes. SROI is a concept developed to account for both traditional financial as well as social value created by an enterprise. It is a way to monetize the non-financial social or environmental value created by an enterprise.

SROI是一個可幫助組織或專案瞭解和量化他們所創造的社會、環境、和經濟價值的成果導向型測量工具。它主要用來衡量利益關係者所感受或者體驗到所產出的價值，需要詳細講述到底哪裡發生了改變，並將其用數字化的方式表達出來。重要步驟包括：

- 定義組織或專案的社會使命及理念
- 定義利害關係者範圍與重要性
- 描述社會效益的產生過程
- 基於某些假設下，將社會效益貨幣化
- 計算社會投資報酬率



SROI – 社會投資報酬率應用實例

羅賓漢基金會 (The Robin Hood Foundation) 於1988年成立於紐約，採納了創投式慈善模式，對抗貧窮議題，並在撥款過程中，應用了財務投資的原則。



觀察紀錄
專案成果



賦予社會改變
對等金錢價值



成本效益
分析計算

受訓者個人收入增加
受訓者家庭收入增加
總收入增加
基金會貢獻
基金會成本

\$2.6M

\$0.3M

$\$2.6 + 0.3 = 2.9M$

$\$2.9 * 0.5 = 1.45M$

\$0.2M

成本效益比例

效益 / 成本

$\$1.45M / \$0.2M$

7.25x

基金會每投資一塊錢，服務對象收入可增加七塊錢



SROI – 社會投資報酬率應用實例

卡爾伏特基金會 (Calvert Foundation) 旨在投入資金到貧困社區，以實踐可持續發展。運用工具紀錄投資項目與成果，在過去12年中共投資6.5億美金，創造35萬個工作機會、1.3萬個安全居所、協助2萬個非營利組織發展社會創新專案。

SOCIAL RETURN ON INVESTMENT (SROI) CALCULATOR

1. Select the investment amount: *

Select Amount ▼

2. Select the term of investment: *

Select Term ▼

3. Select a geographic area:

Any Geographic Area ▼

and/or impact sector:

Any Impact Sector ▼

4. Calculate the Social Return!

CALCULATE

* Please note that fields marked with an asterisk are required.

[> Learn more](#)



SROI – 實作練習時間！



HP Global Social Innovation Early Infant Diagnostic Project



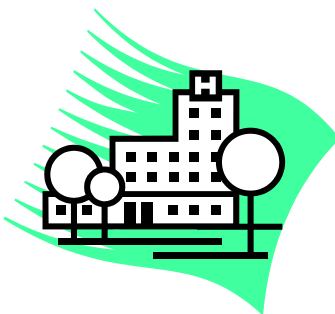
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SROI – 實作練習時間！



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與寶寶



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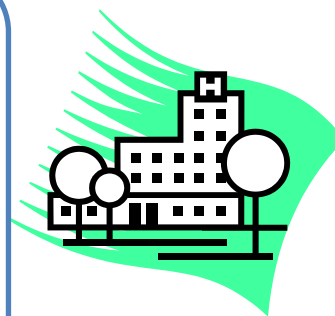
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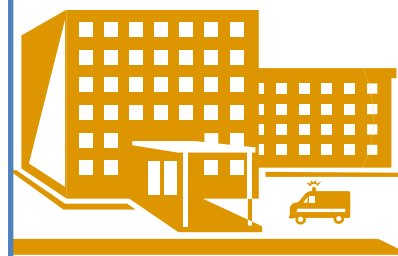
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- 柯林頓
- 大學
- 衛生部



小型診所
或醫療站



支持單位
- 惠普
- 衛生部



大型醫院
醫學中心



SROI – 實作練習時間！

EID Project in Social Return on Investment

- 依照之前分組
- 各組計算惠普、肯亞衛生部、愛滋媽媽、愛滋寶寶因為此專案而產生的成本與效益
- 列出衡量效益、指標與公式即可，無須實際數據
- 討論時間**20-30**分鐘，並請每組發表
- 有任何問題都請隨時提出





SROI – 新概念、新挑戰

其實衡量社會績效與影響並不簡單，因為....

- 1 並非所有社會效益都能被量化、金錢化
- 2 許多社會效益要較長時間才會展現
- 3 不同領域的社會效益衡量指標差異大
- 4 不同利害關係者重視面向也不盡相同

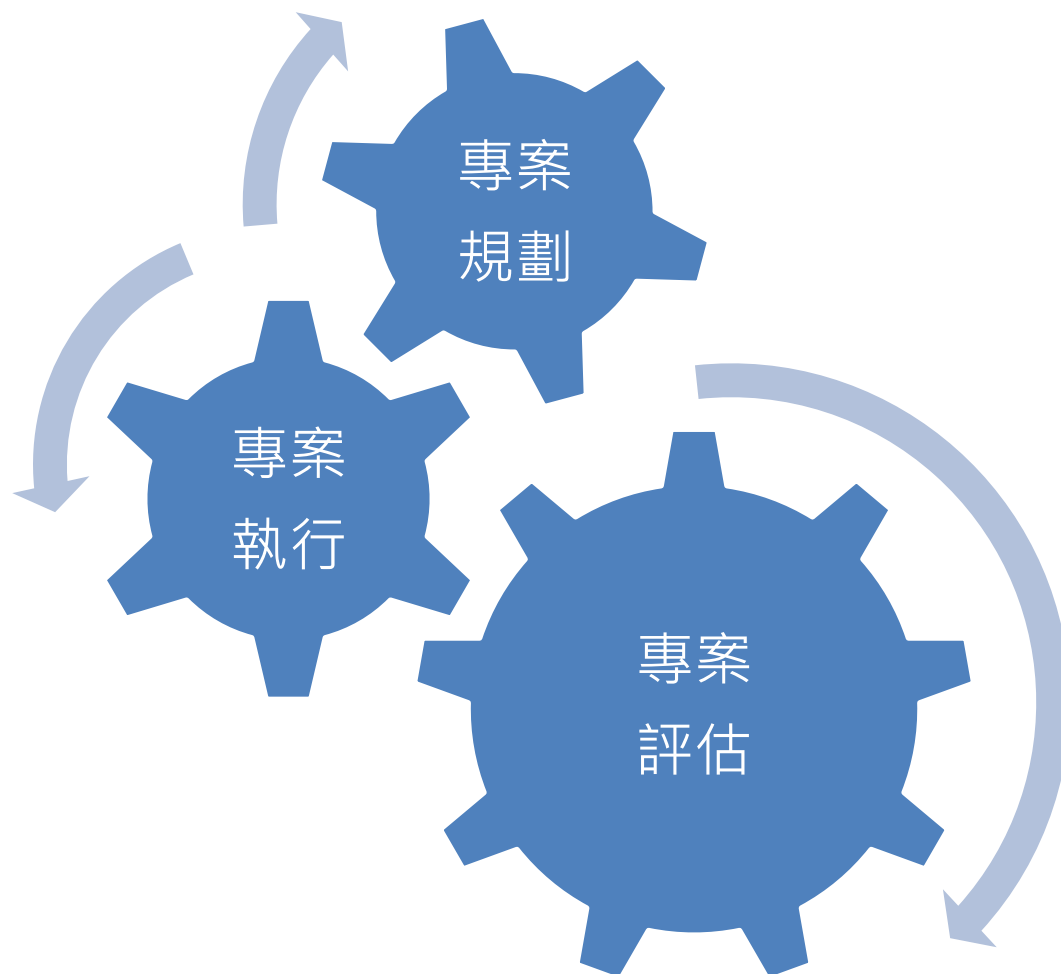


SROI – 七大度量原則

- 1 讓利害關係者作見證
- 2 清晰表達轉變的始末
- 3 量度金錢與非金錢價值
- 4 要包含真實具體項目
- 5 勿誇大或過份邀功
- 6 分析與推論程序透明
- 7 確保論據的合理性



When - 衡量社會影響的最佳時機





Share – 常見參考工具與資源



Impact Investing
Resources

Investors'
Council

Impact Reporting
and Investment
Standards (IRIS)

ImpactBase

Network
Membership

About Us



ImpactBase is the online global directory of impact investment vehicles.

1 | 2 | 3 | 4 | 5 | 6

The Global Impact Investing Network is a not-for-profit organization dedicated to increasing the scale and effectiveness of impact investing. Impact investments are investments made into companies, organizations, and funds with the intention to generate measurable social and environmental impact alongside a financial return.

► [READ MORE](#)



What's New?



GIIN Publishes Research on Catalytic First Loss Capital

The GIIN released an issue brief that details the motivations, benefits, considerations and suitable scenarios behind the use of catalytic first-loss capital in impact investing transactions.

STAY CONNECTED

Email address



Sign up to receive news from the GIIN





Share – 常見參考工具與資源

The SROI Network Intl.

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How Has SROI Helped Me?

"The process of undertaking an SROI has helped us to understand the importance of stakeholder involvement and asking stakeholders about what has changed for them as a result of the support they received. This has helped us to gain a deeper understanding of the support provided by the service that we fund and the impact it has on the lives of the people they help. ...We hope this learning will enable the service to continually improve the way they collate outcomes in the future and therefore prove their value." Holly



Share – 常見參考工具與資源



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Tools and Resources for Assessing Social Impact

TRASI

CHOOSE A SECTION ▼

FIND TOOLS TO ASSESS
YOUR ORGANIZATION'S IMPACT.



FIND A TOOL

Find ready-to-use tools and learn what leading nonprofits, foundations, and others are using to measure their impact.

GO >

E.g., survey, logic model, microfinance

MEASURE
THE EFFECTIVENESS
OF YOUR PROGRAMS.



WHY ASSESS YOUR IMPACT?



CONNECT WITH PEERS
TO LEARN WHAT WORKS.



JOIN THE COMMUNITY

Connect with a network of peers and experts engaged in assessment.

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Social Return on Investment (SROI) Collection



53 votes

Published in 2000

The term SROI has been used in various contexts to mean that nonprofits create social value. However, there have been limited efforts to date to quantify and monetize this social value creation. REDF has created an SROI Framework that identifies direct, demonstrable cost savings and revenue contributions associated with an individual's employment in a social purpose enterprise. The measurements include tracking social outcomes of ordinarily difficult to monetize measures of social value, such as increases in self-esteem and social support systems, or improvements in housing stability. Each social purpose enterprise within REDF's Portfolio has participated in this evaluation process, with the results tabulated within each of eleven SROI Reports. REDF's methodology is chronicled within the SROI Methodology Paper, and an Excel model is available for practitioners to determine the SROI metrics for their own organizations.

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Thank You!



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