
Why Collect Data?

Impact evaluation measures the depth and breadth of impact, captures intended and unintended outcomes, and facilitates informed decision making. In the context of the Buying with Impact project, impact evaluation aims to show the change in Advanced Education Institutions (AEIs), the proportion of their procurements that are from social enterprises, and the impacts that this has on the social enterprises they procure from. This is important in being able to identify and measure the effectiveness of the project so that it can be modified, scaled, and implemented in other anchor institutions to increase their social procurements.

In order to conduct a rigorous evaluation, high quality data should be collected in a consistent way. Baseline data should be collected before project activities are initiated in order to understand the existing knowledge, attitudes, behaviours and intentions of institutions and enterprises. These metrics will be used as a comparison to show the impact of the project at its conclusion, and then regularly (e.g. annually) to evaluate the longitudinal impacts and the sustainability of the project outcomes. Collecting data throughout the project can help to measure the impact of each step and identify the parts of the project that should be modified and implemented in other contexts. Collaborating with other participating AEIs or SEs to align data collection would enable comparison between institutions or enterprises to identify successful practices and interventions that could also be adapted to suit varying contexts. Asking other AEIs or SEs that are not participating in the project to act as a control group would allow comparison to institutions and enterprises that were not influenced by the project, but that may have been subject to similar externalities as those in the project like societal, market or government shifts.

Data Collection Tools

Evaluating the Buying with Impact project should utilize a mixed methods approach in order to validate the results of each data collection method through triangulation of methods. For example, self-reported behaviours in surveys can be confirmed through administrative records of purchasing and sales data. A combination of surveys, interviews, and administrative records, including purchasing data and RFQ documents, will be best suited to conduct a comprehensive evaluation of the projects impacts.

Surveys

Surveys should collect information that speaks to the knowledge, attitudes, behaviours, and intentions of respondents and can include both qualitative and quantitative questions. Online surveys are often the most convenient option for respondents, as it allows them to answer where and when they are comfortable. They also lead to the most honest responses due to the anonymity afforded by answering on a computer without requiring human interaction. Computer assisted telephone or personal interviews allow respondents to answer the same survey questions verbally, over the phone or in person. The human interaction increases response rates over online surveys, but makes responses more susceptible to observer and social desirability biases. The process is also more time consuming and resource intensive, as it requires setting up a mutually convenient time, and the use of a dedicated interviewer.

Key Informant Interviews & Focus Groups

Key informant interviews and focus groups are another way of collecting information on the sentiments of individuals. Key informant interviews are in depth, qualitative interviews that should be done with people in a range of roles, who each have first-hand experience with AEI procurements or social enterprises. Focus groups should be used to gather people for discussions in a safe setting where members can interact and influence each other. In order to maintain consistency in the questions being asked and the types of information being collected, interview guides and protocols should be prepared and applied for interviews and focus groups. Both options can yield valuable insights from diverse perspectives and are useful in validating results from other methods of data collection. Additionally, in the case of low response rates to surveys, interviews and focus groups can be modified to gain in depth insights to complement the evaluation.

Administrative records

Purchasing data from AEIs and sales data from SEs are valuable as a source of quantitative data that provides insights into the behaviours of organizations. Purchasing data from AEIs can be filtered to uncover procurement patterns by department, manufacturer, and product type. This kind of information is less prone to reporting biases but can be difficult to navigate based on input errors and incomplete information. Inconsistency in how the data is collected between purchasing methods and across AEIs and SEs will make this data difficult to compare, but adoption of recommended changes to the data infrastructure through the Buying with Impact project may ease some of these concerns and enable easier analysis and comparison in the future.

Reviewing relevant documents, including previous requests for quotations (RFQs) and existing procurement policies of AEIs can expose barriers to social procurements. Language used in these RFQs and policies could be biased against social enterprise bids or social procurement overall. Reviews of the bid criteria as well as the scoring guides can be used to surface underlying attitudes, and changes in the language used in these documents over time can reveal a change in these attitudes.

Data Collection Sample

In order to evaluate a change to an institution-wide process, data must be collected from a wide range of individuals spanning the various departments that will be impacted. These changes will be

felt the most directly by the procurement departments of the AElS, followed by the staff who procure for their departments, and less directly by other staff and students in the institutions. In order to obtain a comprehensive understanding of procurement in the AElS and the impact of the Buying with Impact project, procurement teams should be treated as the primary target population and department level procurement staff should be seen as the secondary target population.

Surveys should be completed by the entire primary target population to ensure comprehensive coverage of the current behaviours within the procurement department. A sample of the secondary target population should also complete surveys, representing the types of procurement needs as well as the variety of products and services purchased by the institutions. Among social enterprises, surveys should be sent to individuals within the venture with a focus on sales, business development, or procurement, as well as to key decision makers who influence the types of business being pursued. In both AElS and social enterprises, baseline and post project surveys should be role-based, in order to measure the change in behaviours and sentiments of a certain position and to mitigate inconsistent data due to staff turnover. All relevant staff should be surveyed at each point of the project, as their responses can be used in aggregate to show an overall shift in the sentiment of the organization.

If interviews are being conducted, smaller samples of each target audience should be identified. This sample should still be representative of the various procurement needs of the AElS, and the range of roles in social enterprises. In the case of low response rates to surveys, these sample sizes can increase to obtain a larger range of perspectives. Without mitigating low response rates, the validity of the evaluation can be compromised, only representing the attitudes and behaviours of a small group that is not always representative of the population.

Data Collection and Evaluation Team

Data collection, analysis, and reporting for the purposes of the evaluation should be done by an external third party with no previous ties to any of the AElS or SEs to minimize conflicts of interest or biases. The evaluation team should work in consultation with the procurement leads of AElS and decision makers within the social enterprises. Advice and input should be requested from AElS and SEs on the appropriateness of the evaluation plan, given their knowledge of the specific institutional and enterprise contexts.

If the data collection and evaluation must be done internally, the evaluation team should include an equal number of people from AEI and SE. These individuals should not be involved in the project or the processes that it aims to affect. This team composition is important in order to ensure a balanced evaluation plan and an unbiased assessment. This means that representatives from the AElS should not come from the procurement departments, nor should they procure for their own departments within the institutions. Similarly, the evaluation team members that come from the social enterprises should not be involved in the sales or procurement bidding process for the enterprises.

Following the collection of data, all information should be given to an impartial individual or group of individuals with experience in data analysis and evaluation, to write and report the evaluation findings.

Schedule of Collection

Data collection should occur at least twice throughout the project: before the commencement of project activities, and following the completion of interventions. The first data collection would ideally happen before or around the beginning of the project, to establish a baseline before the project has started to have any impact on respondents. It should be collected again at the end of the project to measure the immediate impact. More frequent data collection throughout the project can be beneficial in identifying the incremental impacts of individual interventions, but collecting it through surveys increases the risk of respondent fatigue. Additional data collection could alternatively be done through analysis of purchasing data and document reviews at the start and end of project phases. Following the conclusion of the project, data collection should continue annually in order to evaluate the longitudinal impacts of the project.

To ensure that data is comparable, all collection should occur over a set time frame. This means that surveys should go out at the same time to all the levels of staff at all of the AElS and SEs and should close to all respondents at the same time. Requests for interviews should be sent out in one batch and should take place over roughly the same span of time, to ensure the data is being collected under consistent circumstances. Purchasing and sales data as well as documents for review should be retrieved from AElS and SEs for the same timeframe.

Communication of Evaluation

It is important to communicate the intention to conduct an impact evaluation early in the project, and to clearly lay out what this means for project participants. Cooperation in the evaluation and data collection processes is higher when it is introduced as an integrated component of the project rather than as a separate process that is running in parallel.

From the beginning, communications to project participants should include expectations around interview and survey participation, as well as timelines so that respondents can know when to expect to be asked for information. Once surveys are distributed, reminders should be sent on a predetermined basis to people who have not responded, and personal follow-up calls and e-mails can be made to bolster response rates. Every communication requesting information should include a note that clearly articulates how the collected data will be used, and who will have access to it. This communication, and the intended use of data, must comply with the regulations of the relevant jurisdiction. For the Buying with Impact project, evaluation data has only been accessible to the impact evaluation team and has only been reported anonymously and in aggregate.

Data Storage and Privacy

Privacy and data protection are often high priorities to survey and interview respondents. When reporting, it is important that data be presented anonymously and only in aggregated forms. Documents containing personally identifiable information (PII) should always be viewed in a private and secure ways (including physical location, and adequate cyber security) to avoid any accidental security breaches. Keeping the evaluation team small and consistent where possible is also

important in maintaining data privacy, as it minimizes the number of people who will have access to sensitive information before it is anonymized.

Online data storage is often the most convenient way of keeping large amounts of information organized and accessible to a team of people, but there must be safeguards put in place to protect data privacy. If administering an online survey, the login information for the survey tool should be kept between only those who absolutely require access for the design of the survey or the retrieval of information. When PII is stored on an online file sharing service, privacy settings should be maximized with access only given to the necessary members of the evaluation team. Usernames and passwords for survey websites and file sharing services should never be shared with members outside of the team and should always be saved in separate locations so there is never an easy way to access the full login information. The Canadian Anti-Spam Legislation (CASL) has more information on the legal requirements around requesting, using, and storing data.

Potential KABI Key Performance Indicators

Advanced Education Institutions

Knowledge

- Familiarity with internal procurement policies
- Familiarity with institutional social priorities
- Familiarity with measures to ensure compliance with policies and priorities
- Frequency of communications about the procurement policy

Attitude

- Priorities when choosing where to procure from
- How much consideration is given to social and sustainability issues when procuring
- How much consideration is given to segments of the supply chain when procuring
- Understanding the strengths and limitations of social procurement

Behaviour

- Percentage of strategic products and services that are socially procured
- Percentage of everyday products and services that are socially procured
- Percentage of contracts or repeating procurements with social enterprises

Intention

- How many social enterprises have been considered for procurement in the past
- Discussions around social responsibility with current suppliers

Social Enterprises

Knowledge

- Familiarity with the procurement needs of AEs
- Familiarity with current alternatives to their products and services

Attitude

- Ability to quantify the social or environmental impact of products or the enterprise
- Ability to communicate the appeal, exclusivity, and benefits of products
- Ability to communicate the credibility of the enterprise

Behaviour

- Change in the number of full-time and part-time employees

- Funds raised from public or private sources of investment
- Sales revenue raised from core business activities
- Sales revenue raised from AEI procurements
- Sales revenue raised from other procurements

Intention

- How many bids are made to AEIs
- How many bids are made to other procurement opportunities
- The value of procurements bid for
- The value of procurements awarded