



Montreal Declaration on Evaluation and Social Impact Measurement

Preamble

We, social economy (SE) actors and networks, funders and researchers, gathered on April 9, 2019, in Montreal, consider that the various issues, visions and opportunities related to social impact measurement and evaluation require us to take a stand.

Social impact measurement refers, at least in theory, to the quantitative evaluation of the long-term effects directly related to an intervention. It is one option among others to evaluate an intervention. In practice, the concept of social impact measurement is most often used in reference to more varied evaluation approaches that are primarily applicable to short- and medium-term outcomes and effects.

Evaluative approaches that address social phenomena are legitimate. However, they are complex and raise methodological challenges. We cannot reduce social issues to “best practices” or evaluations that aim to account for these issues by applying a universal methodology.

Consequently, we CONSIDER THAT...

...evaluative approaches are currently subject to a prevalent trend that:


- sometimes causes the evaluations to be defined and controlled without consulting the actors concerned;
- drives some organizations to focus their actions on the objectives of the evaluation, sometimes to the detriment of their fundamental mission;
- generally attributes more value to results than processes (forgetting that processes themselves generate effects);
- often favours standardization instead of flexible and context-specific approaches.

...these trends present a risk for the SE and the development model to which it wishes to contribute. A transformation of financial mechanisms is already at work, where the choices of what actions or interventions to take are based more on how easy they are to evaluate, rather than on their relevance to real needs.

...these evaluations can also have consequences for the organizations that are evaluated (including “cherry picking” strategies which target low-risk populations and the selection or substitution of objectives) which may distort their work and their mission.

...they risk leading to a homogenization or leveling of practices that slows down the dynamics of innovation.

...well-conducted evaluation processes are, on the contrary, a powerful guide for action and will enable the social economy to reinforce its identity, reaffirm its political project and improve its practices.



Commitments

For impact measurement and evaluation to enable the social economy to better respond to the needs of communities based on the values and principles that define it, it is important to set certain guidelines. We are committed to work within these guidelines:

- A good evaluation is an evaluation that will be useful to the organization that is evaluated and those it intends to serve through its activities.
- A rigorous evaluation must be participatory, collaborative and involve all stakeholders concerned with the process.
- It is preferable that evaluation approaches focus more on learning.
- The needs and interests of the funders should not take precedence over those of other stakeholders, including producers and users of goods and services.
- Investments in the social economy must not make it dependent on impact measurement in order to repay investors, as is the case with social impact bonds.
- There are no universal tools, indicators or methods. The evaluation process must follow from the context, the needs and aspirations, the objectives and activities of an organization. In other words, it must be flexible and adapt to the objectives of the organization being evaluated.
- Special attention must be paid to the relationship between the challenges of evaluation and the means implemented (dedicated human and financial resources). Funders ought to bear the cost of this process if they impose requirements to measure social impact.

Finally, we are committed to continue to strengthen evaluation networks to ensure that social economy enterprises have access to appropriate expertise and support. Our goal is to allow them to learn and improve in line with their practices.

Coauthors of the Declaration:

