Impact Bond Dataset - Data definitions

Draft version for feedback from the community

March, 2022

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# Impact Bond Dataset

# General Overview tab

|  |  |
| --- | --- |
| Impact Bond Name - (Value) | Full name of the Social Impact Bond. What counts as an Impact Bond project? It is a contractual relationship that includes two core factors:• Payment for social or environmental outcomes achieved• Up-front repayable finance provided by a third party, the repayment of which is (at least partially) conditional on achieving specified outcomes.Each impact bond project that begins work under a new contract, with a new target cohort, a distinct geography, and/or with a later start date is counted separately. |
| Alternative Names - (Value) | Additional or informal names should be specified in this variable. If the project has more than one alternative name, they should be separated by commas. |

Stage of development

|  |  |
| --- | --- |
| Stage of Development - (Value) | Stage of development of the project at the moment of data collection.Codelist options are:* Early-stage design
* Late-stage design
* Contracted
* Implementation
* Service delivery
* Complete
 |
| Stage of Development - (Value) | Latest known stage of development of the project. Codelist options are:  * Contracted: A project falls under the category of ‘contracted’ when key stakeholders have signed a contract but service provision has not started yet.
* Implementation: A project falls under the category of ‘implementation’ when service provision has started.
* Service delivery complete: A project falls under the category of ‘complete service delivery’ when service provision has finished.
* Complete: A project falls under the category of ‘complete’ when service provision has finished, and all outcome payments have been made.
 |
| Stage of Development - (Source ID’s) | Stage of development of the project at the moment of data collection. |
| Stage of Development - (Source ID’s) | Source of information for stage of development. |

Note: The categories of ‘early-stage design’ and ‘late-stage design’ will be deleted as projects in those stages will now be part of the new project pipeline dataset.

Jurisdiction

|  |  |
| --- | --- |
| Jurisdiction - Jurisdiction - (Value) | Project jurisdiction describes a project’s origins, using the place it is governed or organised from, under law, as a proxy.Codelist options are:A 2-character country code from ISO 3166. Eg: GB, US. |
| Jurisdiction - (Source ID’s) | Source of information for jurisdiction. |
| Jurisdiction - (Notes) | Notes on jurisdiction.    |

Dates

|  |  |
| --- | --- |
| Dates - Date outcomes contract signed - (Value) | Date on which the outcomes contract was signed. If signed by parties on different dates, select the latest date of signature. |
| Dates - Date contracts between all parties signed - (Value) | The date on which the full set of required contracts between impact bonds parties received sign off. That is the date – whichever is the later – on which parties signed the outcomes contract; service delivery contract; investment contract or any other contract signalling the agreement to the impact bond arrangement such that full contracting arrangements are signed.  |
| Dates - Anticipated completion date - (Value) | Expected date when final outcomes payments will be made. |
| Dates - Actual completion date - (Value) | Actual date when final outcomes payments were made. |
| Dates - Start date of service provision - (Value) | Date when service provision started/will start. |
| Dates - Anticipated end date of service provision - (Value) | Expected date when service provision will end. |
| Dates - Actual end date of service provision - (Value) | Actual date when service provision ended/will end. |
| Dates - (Source ID’s) | Source of information for variables about dates.  |
| Dates - (Notes) | Notes on key dates of the project.   |

Overall project finance

Every finance variable will be translated into US dollars. The GO Lab team does the conversion using the yearly exchange rate provided by the World Bank [here](https://data.worldbank.org/indicator/PA.NUS.FCRF), using the start year of service delivery as a reference.

|  |  |
| --- | --- |
| Overall project finance - Total investment commitment - Currency - (Value) | Currency in which financial data is reported for this project. |
| Overall project finance - Total investment commitment - Amount - Min - (Value) | When it is not possible to share the exact amount of total investment, projects can present a range with minimum and maximum values. |
| Overall project finance - Total investment commitment - Amount - Min - (Value) | Some projects do not have an exact figure for investment commitment at the beginning of implementation. Some projects can access further capital as the project moves forward. In these cases, projects can share a range of minimum and maximum values of investment commitment. This variable captures the lower value of the range in the currency of the project.  |
| Overall project finance - Total investment commitment - Amount - Exact - (Value) | Total investment amount committed by investors (capital raised), as contractually agreed. Note that this should not include any recycled outcome payments. |
| Overall project finance - Total investment commitment - Amount - Exact - (Value) | Total investment amount committed by investors (upfront capital raised), as contractually agreed. Note that this should not include any recycled outcome payments.  |
| Overall project finance - Total investment commitment - Amount - Max - (Value) | When it is not possible to share the exact amount of total investment, projects can present a range with minimum and maximum values. |
| Overall project finance - Total investment commitment - Amount - Max - (Value) | Some projects do not have an exact figure for investment commitment at the beginning of implementation. Some projects can access further capital as the project moves forward. In these cases, projects can share a range of minimum and maximum values of investment commitment. This variable captures the higher value of the range in the currency of the project.  |
| Overall project finance - Total investment commitment - Amount USD - Min - (Value) | Minimum investment amount in US dollars. |
| Overall project finance - Total investment commitment - Amount USD - Exact - (Value) | Exact investment amount in US dollars. |
| Overall project finance - Total investment commitment - Amount USD - Max - (Value) | Maximum investment amount in US dollars. |
| Overall project finance - Maximum potential outcome payment - Currency - (Value) | Total maximum payments for outcomes from outcome funders. This should be equal to “contract cap”. |
| Overall project finance - Maximum potential outcome payment - Currency - (Value) | Currency in which maximum potential outcome payments are reported for this project.  |
| Overall project finance - Maximum potential outcome payment - Amount - (Value) | Total maximum payments for outcomes from outcome funders. This should be equal to “contract cap”. |
| Overall project finance - Maximum potential outcome payment - Amount USD - (Value) | Total maximum payments for outcomes from outcome funders in US dollars.  |
| Overall project finance - Maximum potential loss - (Value) | Percentage of principal that investors stand to lose in a worst-case scenario. Please provide for each investor, if different. |
| Overall project finance - Maximum potential return type - (Value) | This variable identifies whether the return is average annual return or IRR (Internal rate of return). |
| Overall project finance - Maximum potential return - (Value) | Percentage return that investors expect to gain in best case scenario. Return can be understood as the profit on an investment. This is typically the ratio of the income from the investment over the cost of the investment. Please provide for each investor, if different. |
| Overall project finance - Configuration of the Contracting Parties - (Value) | A description of the bilateral or multilateral relationship between contracting parties. It identifies which party/parties hold the contract with the outcome funder (or which actor has majority control of a contract-holding Special Purpose Vehicle). |
| Overall project finance - Configuration of the Contracting Parties - (Value) | A description of the bilateral or multilateral relationship between contracting parties. It identifies which party/parties hold the contract with the outcome funder (or which actor has majority control of a contract-holding Special Purpose Vehicle).This variable does not have a codelist, but these are some suggested options:  * Managed structure: bilateral outcomes contract between outcomes payer and intermediary organisation or intermediary-owned SPV.

 * Intermediated structure: bilateral outcomes contract between outcomes payer and investor organisation, or investor-owned SPV.

 * Direct structure: bilateral outcomes contract between outcomes payer and service provider or service provider-owned SPV.

 * Framework structure: multilateral contract where multiple parties – provider, investor and/or intermediary – are all direct parties to the same outcomes contract with the outcome payer.
 |
| Overall project finance - Investor repayment - (Value) | To be completed at the end of the project. Extent to which investment and return was paid to investor. |
| Overall project finance - Investor repayment - (Value) | To be completed at the end of the project. Extent to which investment and return was paid to investor.  Suggested options are:  * No repayment (no principal or return)
* Some repayment (but below value of principal)
* Principal repaid (but no net return)
* Principal + positive net financial returns
* Not publicly available
 |
| Overall project finance - Total outcome payments made - Currency - (Value) | Currency in which outcome payments data is reported for this project. |
| Overall project finance - Total outcome payments made - Amount - (Value) | Total actual payments for outcomes disbursed by outcome payers. |
| Overall project finance - Total outcome payments made - Amount USD - (Value) | Total actual payments for outcomes disbursed by outcome payers in USD. This will be calculated by GO Lab staff. |
| Overall project finance - Total outcome payments made - Amount USD - (Value) | To be completed at the end of the project. Total actual payments for outcomes disbursed by outcome payers in US dollars. |
| Overall project finance - (Source ID’s) | Source of information for financial and outcomes payments data.  |
| Overall project finance - (Notes) | Notes on financial and outcomes payments data.  |

Purpose and classifications

|  |  |
| --- | --- |
| Purpose and classifications - Social challenge - (Value) | Broad definition of the social challenges that the project addresses. |
| Purpose and classifications - Social challenge - (Value) | Broad description of the social challenges that the project aims to address.  |
| Purpose and classifications - Intervention - (Value) | Description of the intervention supported by the Impact Bond. |
| Purpose and classifications - Policy sector - (Value) | Main policy sector in which the project is based.Codelist options are:* Employment and training
* Child and family welfare
* Health
* Homelessness
* Education
* Criminal justice
* Agriculture and environment
* Poverty reduction
 |
| Purpose and classifications - Primary SDG goal - (Value) | Primary Sustainable Development Goal (SDG) in which the project is based. To be selected from the 17 SDGs defined in the United Nations 2030 Agenda (2015) https://sdgs.un.org/2030agenda. [This is at the project level. This is also captured at the outcome level] |
| Purpose and classifications - Secondary SDG goals - (Value) | Secondary Sustainable Development Goal (SDG) in which the project is based. Primary SDG Goal must not be included in this variable. [This is at the project level. This is also captured at the outcome level] |
| Purpose and classifications - Primary SDG target - (Value) | This variable identifies what primary SGD target the project is addressing. See United Nations 2030 Agenda (2015) https://sdgs.un.org/2030agenda. [This is at the project level. This is also captured at the outcome level] |
| Purpose and classifications - Secondary SDG targets - (Value) | This variable identifies what secondary SGD target the project is addressing. Primary SDG target must not be included in this variable. See United Nations 2030 Agenda (2015) https://sdgs.un.org/2030agenda. [This is at the project level. This is also captured at the outcome level] |
| Purpose and classifications - (Source ID’s) | Source of information for purpose and classifications data.  |
| Purpose and classifications - (Notes) | Notes on purpose and classifications of this project.  |

Services and beneficiaries

|  |  |
| --- | --- |
| Service and beneficiaries - Target population - (Value) | Description of the population targeted by the project and any eligibility requirement for the cohort of people who are to be offered support. |
| Service and beneficiaries - Targeted number of unique service users or beneficiaries (total) - (Value) | Intended number of individuals in the target population who will be engaged in the service/intervention and/or whose social outcomes will be evaluated for outcome contract payment calculation. |
| Service and beneficiaries - Unit type of targeted service users or beneficiaries - (Value) | Description of the unit of measurement that is used to account for targeted service users or beneficiaries.Codelist options are:* Individual
* Other
 |
| Service and beneficiaries - Unit description of targeted service user or beneficiaries - (Value) | This field will only be completed if the answer to the last variable was “other”. This variable identifies what type of unit of measurement is used to account for targeted service users or beneficiaries. |
| Service and beneficiaries - Unit description of targeted service user or beneficiaries - (Value) | This field will only be completed if the answer to the last variable was “other”. This variable identifies what type of unit of measurement is used to account for targeted service users or beneficiaries. Examples of other unit of measurements could be families, villages, etc.  |
| Service and beneficiaries - Actual number of unique service users or beneficiaries engaged (total) - (Value) | Effective number of service users after the project was completed. The actual number of service users may differ from the targeted number, as forecasted at the beginnings of the project. |
| Service and beneficiaries - Actual number of unique service users or beneficiaries engaged (total) - (Value) | To be completed at the end of the project or when service delivery is complete. Effective number of service users after the project was completed. The actual number of service users may differ from the targeted number, as forecasted at the beginnings of the project.  |
| Service and beneficiaries - Unit type of actual service users or beneficiaries engaged - (Value) | Description of the unit of measurement that is used to account for targeted service users or beneficiaries.Codelist options are:* Individual
* Other
 |
| Service and beneficiaries - Unit type of actual service users or beneficiaries engaged - (Value) | To be completed at the end of the project or when service delivery is complete. Description of the unit of measurement that is used to account for targeted service users or beneficiaries.Codelist options are:* Individual
* Other
 |
| Service and beneficiaries - Unit description of actual service user or beneficiaries engaged - (Value) | This field will only be completed if the answer to the last variable was “other”. This variable identifies what type of unit of measurement is used to account for actual number of service users or beneficiaries. |
| Service and beneficiaries - Unit description of actual service user or beneficiaries engaged - (Value) | To be completed at the end of the project. This field will only be completed if the answer to the last variable was “other”. This variable identifies what type of unit of measurement is used to account for actual number of service users or beneficiaries. Examples of other unit of measurements could be families, villages, etc.  |
| Service and beneficiaries - (Source ID’s) | Source of information for service users' data.   |
| Service and beneficiaries - (Notes) | Notes on service users' data.   |

Changes to projects due to COVID-19

If the project started, or was delivering services in or after March 2020, it may have experienced some changes due to the COVID-19 pandemic.

|  |  |
| --- | --- |
| Changes to project due to COVID-19 - (Value) | Codelist options are:* Pause project
* Continue on outcomes contract without variations
* Continue on outcomes contract with variations
* Switch to grant payments based on medium scenarios
 |
| Changes to project due to COVID-19 - (Source ID’s) | Source of information for COVID-19 changes in projects.   |

Notes

Notes on the general overview of the project. Key stakeholders can share notes on special characteristics of the project here, such as referral routes or any other special arrangement between parties.

# Outcome Funds

Outcomes funds are becoming an increasingly prominent approach within the ecosystem of social outcomes contracting and impact bond development. Whilst outcomes funds gain popularity as a policy tool, a gap persists in documenting and describing their adoption worldwide. Therefore, the GO Lab aims to link every impact bond project to the corresponding Outcomes Fund.

There is no standard or agreed definition as to what constitutes an 'outcomes fund'. Broadly, an outcomes fund is an approach that enables several outcomes-based contracts to be developed and supported in parallel. A common goal espoused by outcomes fund developers is to improve services that tackle complex social issues by growing the outcomes contracting market particularly by funding impact bonds and other payment-by-results mechanisms. In their broadest sense outcomes funds signal a commitment to pay for social outcomes, rather than inputs or activities.

|  |  |
| --- | --- |
| Id | This variable captures the INDIGO unique identifier for outcomes funds. These identifiers are defined in the Outcomes Fund Dataset and taken from there. |
| Sources | Source of information about Outcomes Funds.   |
| Notes | Notes on Outcomes Funds.   |

When viewing data, other variables from the Outcomes Fund Dataset may be included to provide more information. See the Fund data dictionary for more information on what these variables mean.

# Delivery locations

This is a list. One project can have multiple items of data, as it can deliver services in many different places at the same time. One item of data is defined as:

|  |  |
| --- | --- |
| Service Provision ID - (Value) | The GO Lab team gives an identifier to the different service deliveries that are supported by the same impact bond project. For instance, if a project is providing a service in two different cities, the first service would be identified as ‘servicedelivery1’ and the second one would be ‘servicedelivery2’.  |
| Location - Name - (Value) | Name of the city or region where services are provided. |
| Location - Postcode - (Value) | Postal code of the location where services are provided. |
| Location - Country - (Value) | Country where services are provided.Codelist options are:A 2-character country code from ISO 3166. Eg: GB, US |
| Location - Country - (Value) | Country where services are provided. Countries must be expressed using the ISO 3166 codelist, which contains a 2-character country code for every country (Eg: GB, US, etc.).  |
| Lat/Lng - Lat - (Value) | Latitude and longitude coordinates. GO Lab will add or double check this variable. This variable feeds into the map(s) on the GO Lab website. |
| Lat/Lng - Lat - (Value) | Latitude coordinates must be expressed in decimals (degrees will not work). The GO Lab team will add or double check this variable. This variable feeds into the map(s) on the GO Lab website.  |
| Lat/Lng - Lng - (Value) | Latitude and longitude coordinates. GO Lab will add or double check this variable. This variable feeds into the map(s) on the GO Lab website. |
| Lat/Lng - Lng - (Value) | Longitude coordinates must be expressed in decimals (degrees will not work). The GO Lab team will add or double check this variable. This variable feeds into the map(s) on the GO Lab website.  |
| **Administrative** geography - Name - (Value) |  |
| **Administrative** geography - Code Type - (Value) |  |
| **Administrative** geography - Code - (Value) |  |
| Sources | Source of information about delivery locations.  |
| Notes | Notes on delivery locations.   |

# Sources

This is a list. One project can have multiple items of data, as we may use multiple sources of information to populate one project spreadsheet. One item of data is defined as:

|  |  |
| --- | --- |
| Id | A within-project original, flexible identifiers to be referenced in another sheet. This can be set by the GO Lab analyst. |
| Id | A within-project original, flexible identifier to be referenced in another sheet. The GO Lab team will enumerate sources using names such as ‘source1’, ‘source2’, ‘source3’  |
| Name - (Value) | Name of the person or institution who shared information about this project. |
| Type - (Value) | Type of source of information. |
| Type - (Value) | Type of source of information. Codelist options are:  * Contract
* Report
* Award Notice
* Website
* News piece
* Press release
* Email correspondence
* Evaluation
 |
| Publishing Organisations - (Value) | Organisation that published the evaluation, report, document or website that is cited as a source. |
| Publishing Organisations - (Value) | Organisation that published the evaluation, report or website (etc.) that is cited as a source. If there are many organisations jointly publishing a document, they should all be separated by commas.   |
| URL - (Value) | URL of the document about this project. |
| URL - (Value) | URL of the document about this project, if there is one.  |
| Archive URL - (Value) | A preserved copy of an online source that can be accessed if the original page is moved, changes, or disappears. |
| Internal URL - (Value) |  |
| Publication Date - (Value) | Date when the information about this project was published. |
| Accessed Date - (Value) | Date when the information about this project was accessed. |
| Notes | Notes on sources of information.   |

# Organisations

When viewing data, variables from the organisation data model may be included to provide more information. See [the Organisation data dictionary](https://indigo-data-standard.readthedocs.io/en/latest/data-dictionary/organisation.html) for more information on what these variables mean.

The organisations listed are those referenced in in other tabs of the spreadsheet (such as service providers, investors, outcome payers, etc.). Each organisation has a unique INDIGO identifier defined by the GO Lab team

# Service Provisions

This section aims to collect data about four different dimensions of service provision:

* Organisations providing services to impact bond projects
* Planned services
* Actual services
* Alterations to contracted services

This is a list. One project can have multiple items of data, as one impact bond could have several service providers. One item of data is defined as:

|  |  |
| --- | --- |
| Id | A within-project original, flexible identifiers to be referenced in another sheet. This can be set by the analyst. |
| Id | A within-project original, flexible identifiers to be referenced in another sheet. This will be set by the GO Lab team. These names could be ‘serviceprovider1’, ‘serviceprovider2’, etc.   |
| Organisation ID - (Value) | INDIGO identifier of the organisation that provides services for this impact bond project. See INDIGO Identifiers section. |
| Organisation Role Category - (Value) | Category of service provider.Codelist options are:* Nonprofit/NGO
* Foundation/Philanthropist
* Government/Public Sector/Public Bank
* For-profit
* Other
 |
| Intervention - (Value) | Description of the intervention or the activities that service providers are funded to address the social challenge. |
| Planned Service - Start - (Value) | Expected date when service delivery starts. |
| Planned Service - End - (Value) | Expected date when service delivery ends. |
| Actual Service - Start - (Value) | Actual date when service delivery starts. |
| Actual Service - End - (Value) | Actual date when service delivery ends. |
| Alterations to service - Description - (Value) | This variable specifies whether there has been a modification in the service delivery. Where there are multiple alterations, this field should describe all alterations that have taken place. |
| Alterations to service - Reason - (Value) | This variable presents the motivation for that modification, if applicable. Where there are multiple alterations, this field should describe the reason for all alterations that have taken place. |
| Sources | Source of information about service provisions.   |
| Notes | Notes on service provisions.   |

# Outcome Payment Commitments

This section aims to collect data about three different dimensions of outcome payments:

* Organisations paying for outcomes
* Maximum potential outcome payments (in best case scenario)
* Total outcome payments made up to date (this can be updated during the life of the project)

This is a list of data items. One project can have multiple items of data, as one project may have multiple outcome payers. One item of data is defined as:

|  |  |
| --- | --- |
| Organisation ID - (Value) | INDIGO identifier of the organisation that pays for social outcomes in this impact bond project. See INDIGO Identifiers section. |
| Organisation Role Category - (Value) | Category of outcome payerCodelist options are:* Nonprofit/NGO
* Foundation/Philanthropist
* Government/Public Sector/Public Bank
* Multilateral/Bilateral/Intergovernmental Financial Institution
* Corporate Giving
* Investment Fund
* Other
 |
| Maximum potential Outcome payment - Currency - (Value) | Total maximum payments for outcomes from each outcome payer. Currency. |
| Maximum potential Outcome payment - Amount - (Value) | Total maximum payments for outcomes from each outcome payer. |
| Maximum potential Outcome payment - Amount USD - (Value) | Total maximum payments for outcomes from each outcome payer in US dollars.  |
| Result type - (Value) | This variable specifies whether a result is interim or over all (final).Codelist options are:* Interim
* Overall
 |
| Result type - (Value) | This variable specifies whether a result is interim or over all (final). Codelist options are: * Interim: interim or intermediate results can be shared specifying details of the duration of the performance period (for instance, ‘outcomes achieved during year 1’)
* Overall: overall results are achieved when the project is finished.
 |
| Period - Start - (Value) | This variable provides the start date of the performance period. |
| Period - End - (Value) | This variable provides the end date of the performance period. |
| Total outcome payments made - Currency - (Value) | Currency in which outcome payments are reported for this project. |
| Total outcome payments made - Amount - (Value) | Total actual payments for outcomes disbursed by outcome payers in relevant local currency. |
| Total outcome payments made - Amount - (Value) | Total actual payments for outcomes disbursed by outcome payers at the moment of data collection in relevant currency.   |
| Total outcome payments made - Amount USD - (Value) | Total actual payments for outcomes disbursed by outcome payers in USD. |
| Alterations to payment commitment - Description - (Value) | Detail of the modifications to payment commitments **occurred** during the life of the impact bond project. |
| Alterations to payment commitment - Reason - (Value) | Brief explanation of the reasons behind the modifications to payment commitments **occurred** during the life of the impact bond project. |
| Sources | Source of information about outcome payments.   |
| Notes | Notes on outcome payments.  |

# Investment

This section aims to collect data about three different dimensions of investment:

* Organisations investing in impact bond projects
* Initial investment commitments
* Return to investment in best case scenario
* Investor repayments (this can be updated during the life of the project)

This is a list. One project can have multiple items of data, as one project can receive capital from different investors. One item of data represents a particular investor and is defined as:

|  |  |
| --- | --- |
| Id | A within-project original, flexible identifiers to be referenced in another sheet. This can be set by the GO Lab analyst. |
| Id | A within-project original, flexible identifiers to be referenced in another sheet. This will be set by the GO Lab team. These names could be ‘investment1’, ‘investment2’, etc.  |
| Organisation ID - (Value) | INDIGO identifier for the organisation that invested upfront capital for this project. See INDIGO Identifiers section. |
| Organisation Role Category - (Value) | Codelist options are:* Nonprofit/NGO
* Foundation/Philanthropist
* Government/Public Sector/Public Bank
* Multilateral/Bilateral/Intergovernmental Financial Institution
* Corporate Giving
* Investment Fund
* High Net Worth Individual/Family Office/Private Bank
* Impact Investor
* Commercial
 |
| Investment Commitment - Currency - (Value) | Currency in which investments are reported for this project. |
| Investment Commitment - Amount - Min - (Value) | When it is not possible to share exact amounts, projects can share a range with minimum and maximum amount of investment committed by each investor. |
| Investment Commitment - Amount - Min - (Value) | When it is not possible to share exact amounts, projects can share a range with minimum and maximum values of investment committed by each investor. This variable captures the lower value in the range.   |
| Investment Commitment - Amount - Exact - (Value) | Exact amount of committed investment from each investor in relevant currency. |
| Investment Commitment - Amount - Max - (Value) | When it is not possible to share exact amounts, projects can share a range with minimum and maximum amount of investment committed by each investor. |
| Investment Commitment - Amount - Max - (Value) | When it is not possible to share exact amounts, projects can share a range with minimum and maximum values of investment committed by each investor. This variable captures the higher value in the range.  |
| Investment Commitment - Amount USD - Min - (Value) | Minimum amount of investment committed by each investor in USD (when it is not possible to have exact amount in USD). |
| Investment Commitment - Amount USD - Exact - (Value) | Exact amount of investment committed by each investor in USD. |
| Investment Commitment - Amount USD - Max - (Value) | Maximum amount of investment committed by each investor in USD (when it is not possible to have exact amount in USD). |
| Maximum Potential loss - (Value) | Percentage of principal that investors stand to lose in a worst-case scenario. |
| Maximum Potential Return Type - (Value) | This variable specifies whether the maximum potential return type is measured as average annual return or IRR.Codelist options are:* IRR
* Average annual return
 |
| Maximum Potential Return - (Value) | Percentage return that investors stand to gain in best case scenario. |
| Investor Repayment - (Value) | Extent to which investment and return was paid to investor.Codelist options are:* No repayment (no principle or return)
* Some repayment (but below value of principle)
* Principal repaid (but no net return)
* Principal + positive financial returns
* Not publicly available
 |
| Investment Type - (Value) | This variable identifies whether this investment qualifies as debt, equity or a combination of both.Codelist options are:* Debt
* Equity
* Combination
 |
| Sources | Source of information about investments.  |
| Notes | Notes on investment amounts or investors.   |

# Intermediary services

This section aims to collect data about two different dimensions of intermediary services:

* Organisations providing intermediary services to impact bond projects
* Type of intermediary services

This is a list. One project can have multiple items of data, as one project may receive intermediation from several organisations. One item of data represents one intermediary organisation and is defined as:

|  |  |
| --- | --- |
| Organisation ID - (Value) | INDIGO identifier for the organisation that provides intermediary services for this project. See INDIGO Identifiers section. |
| Organisation Role Category - (Value) | The role(s) or key functions performed by each of the named intermediaries.Codelist options are:* Impact bond design
* Financial and commercial **modelling**
* Impact bond investment structure
* Capital raise
* Loan arranger
* Performance management
* Legal counsel
* Technical assistance
* Other
 |
| Other Role Description - (Value) | If an organization is providing a role that is not listed above, it can be listed in this field. |
| Sources | Source of information about intermediary organisations.  |
| Notes | Notes on intermediary organisations.   |

# Outcome metrics

This is a list. One project can have multiple items of data, as one project may have several social outcomes to achieve. One item of data represents one social outcome metric and is defined as:

|  |  |
| --- | --- |
| Id | A within-project original, flexible identifiers to be referenced in another sheet. This can be set by any analyst. The outcome is what changes for an individual as the result of a service or intervention. |
| Id | A within-project original, flexible identifiers to be referenced in another sheet. This can be set by the GO Lab team. These identifiers could be ‘outcomemetric1’, ‘outcomemetric2’, etc.  |
| Outcome Definition - (Value) | An outcome target or metric is the specific value attached to the measure of outcomes for the purposes of determining whether satisfactory performance has been achieved. In an impact bond, these targets will usually determine whether a payment is made to the provider or investor. This variable provides a detailed description of the metric(s) used to determine payments from the outcome payers. It should provide a clear definition of the conditions under which an outcome is agreed to have been ‘achieved’ or ‘not achieved’. |
| Outcome Definition - (Value) | The outcome is what changes for an individual as the result of a service or intervention. Example of outcomes include ‘access to a formal job’, ‘improve learning at school’, ‘improve access to health services’, etc.   |
| Target Population - (Value) | Description of the targeted population of beneficiaries or service users. |
| Target Population - (Value) | Description of the targeted population of beneficiaries or service users that are intended to achieve pre-arranged social outcomes.  |
| Targeted number of service users Or beneficiaries (total) - (Value) | Targeted number of beneficiaries/service users for each outcome metric |
| Unit type of targeted Service users or beneficiaries - (Value) | Description of the unit of measurement that is used to account for targeted service users or beneficiaries.Codelist options are:* Individual
* Other
 |
| Unit description of Service user or beneficiaries - (Value) | This field will only be completed if the answer to the last variable was “other”. This variable identifies what type of unit of measurement is used to account for targeted service users or beneficiaries. |
| Outcome metric target - (Value) | Targeted levels of outcome metrics to be achieved (e.g. the proportion of people supported who are expected to achieve a given outcome) |
| Outcome metric target - (Value) | An outcome metric target is the specific value attached to the measure of outcomes for the purposes of determining whether satisfactory performance has been achieved. In an impact bond, these targets will usually determine whether a payment is made to the provider or investor. This variable provides a detailed description of the metric(s) used to determine payments from the outcome payers. It should provide a clear definition of the conditions under which an outcome is agreed to have been ‘achieved’ or ‘not achieved’.   |
| Other target for Meeting outcome metric target - (Value) | This variable identifies information about other/secondary targets that need to be met in order to achieve the outcome. |
| Outcome validation Method - (Value) | The approach taken to assessing whether the specified outcomes have been achieved and the basis on which ‘outcome payments’ will be made. This could take the form of validated administrative data (for example in a rate card for youth engagement where young people achieve education outcomes, the production of these qualifications may be used as the basis of outcome payments) or a formal and independent impact evaluation (for example under a Randomised Control Trial or quasi-experimental study outcome payments are only made when the performance of the treatment group is significantly improved when compared to the control group). To be selected from: Randomised Control Trial; Quasi-experimental study; Historical comparison (e.g. comparison to historical benchmark); Pre-Post analysis (measurement of outcomes for target individual or cohort before and after intervention); Simple ex-post verification; Not available. |
| Data source for Outcome validation - (Value) | The sources of information for outcome validation could be existing administrative data or new data collected. |
| Policy sector - (Value) | Main policy sector in which the project is based. |
| Policy sector - (Value) | Main policy sector in which the outcome metric is based.  |
| Primary SDG goal - (Value) | Primary Sustainable Development Goal (SDG) in which the project is based. To be selected from the 17 SDGs defined in the United Nations 2030 Agenda (2015) https://sdgs.un.org/2030agenda. |
| Secondary SDG goals - (Value) | Secondary Sustainable Development Goal (SDG) in which the project is based. Primary SDG Goal must not be included in this variable. |
| Primary SDG target - (Value) | This variable identifies what primary SGD target the project is addressing. See United Nations 2030 Agenda (2015) https://sdgs.un.org/2030agenda. |
| Secondary SDG targets - (Value) | This variable identifies what secondary SGD target the project is addressing. Primary SDG target must not be included in this variable. See United Nations 2030 Agenda (2015) https://sdgs.un.org/2030agenda. |
| Sources | Source of information about outcome metrics.  |
| Notes | Notes on outcome metrics.  |

# Outcome Pricing

This is a list. One project can have multiple items of data, as one project may have several social outcomes to achieve with different prices. One item of data represents one social outcome price and is defined as:

|  |  |
| --- | --- |
| Outcome Metric Id - (Value) | A within-project original, flexible identifier to be referenced in another sheet. This can be set by the GO Lab analyst. This ID should be equal to the ID that was stated in the “Results” and “Outcome metrics” sections. |
| Currency - (Value) | Currency in which outcome pricing data is reported for this project. |
| Price Per Unit - Amount - (Value) | Price per unit, often a participant, for whom outcomes are achieved. Price here is the cost to the outcome payer. This is to be populated only if there is a single outcome which is measured at the unit /individual level. Use the currency stated in the above field. |
| Price Per Unit - Amount - (Value) | Price per unit, often a participant, for whom outcomes are achieved. Price here is the cost to the outcome payer. The unit should be equal to the unit of measurement in the ‘Service and beneficiaries’ part of the General Overview tab (eg: individuals, families, villages, etc.). This is to be populated only if there is a single outcome which is measured at the unit /individual level.  |
| Price Per Unit - Amount USD - (Value) | Price per unit, often a participant, for whom outcomes are achieved in USD. Price here is the cost to the outcome payer. |
| Maximum Price if all targets achieved - Amount - (Value) | Maximum price if all targets related to that outcome are achieved. |
| Maximum Price if all targets achieved - Amount - (Value) | Maximum price if all targets related to that outcome metric are achieved and all targeted people achieve this outcome. |
| Contracted increases to outcome pricing - (Value) | If certain price increases have been contracted (e.g. inflation adjustments), **a** description of these terms should be provided.  |
| **Price Description - (Value)** |  |
| Sources | Source of information about outcome pricing.  |
| Notes | Notes on outcome pricing.  |

# Results

This is a list. One project can have multiple items of data, as one project may have several social outcomes with different results. One item of data represents the result for one social outcome metric and is defined as:

|  |  |
| --- | --- |
| Outcome Metric Id - (Value) | A within-project original, flexible identifiers to be referenced in another sheet. This can be set by a GO Lab analyst. |
| Outcome Metric Id - (Value) | A within-project original, flexible identifier to be referenced in another sheet. This can be set by the GO Lab team. This ID should be equal to the ID that was stated in the “Results” and “Outcome metrics” sections. These identifiers could be ‘outcomemetric1’, ‘outcomemetric2’, etc.  |
| Result level - (Value) | This variable specifies whether a result was captured at the outcome level or project level.Codelist options are:* Project level
* Outcome level
 |
| Result type - (Value) | This variable specifies whether a result is interim or final.Codelist options are:* Interim
* Final
 |
| Result type - (Value) | This variable specifies whether a result is interim or final. Interim results are reported when the GO Lab receives data from live projects. Final results are reported when the GO Lab receives the final data for complete projects.   |
| Period - Start - (Value) | This variable provides the start date of the performance period. |
| Period - End - (Value) | This variable provides the end date of the performance period. |
| Outcomes achieved - (Value) | A description of the outcomes that were achieved, according to the specifications of the contract. |
| Outcomes achieved - (Value) | A description of the outcomes that were achieved, according to the specifications of the contract. This description can be similar to the description of outcome metrics in the ‘Outcome metric’ tab.  |
| Number engaged In impact bond - (Value) | Number of users or beneficiaries who engaged in the impact bond project. |
| Number engaged In impact bond - (Value) | Number of users or beneficiaries who engaged in the impact bond project. This variable should be completed only when projects are sharing data at the project level.   |
| Number with Positive social outcomes - (Value) | Number of users or beneficiaries who engaged in the impact bond project and achieved positive outcomes. |
| Number with Positive social outcomes - (Value) | Number of users or beneficiaries who engaged in the impact bond project and achieved positive outcomes. This variable should be completed only when projects are sharing data at the project level.  |
| Other Description of result - (Value) | A broader description of the results of the impact bond, if applicable. |
| Outcomes validator(s) - (Value) | Name(s) of organization(s) responsible for validating the achievement of outcomes or otherwise assessing the metrics underpinning outcome payments. One outcome can have two or more validators. |
| Evaluation Documents - (Value) | An evaluation is an objective assessment of a programme to determine whether and to what degree the intervention in an impact bond project has had an impact on the measured outcome variables over time. This variable provides a link to any published evaluations, if applicable. |
| Sources | Source of information about results.  |
| Notes | Notes on results.  |

# Outcome payments

This is a list. One project can have multiple items of data, as one project can receive different outcome payments for different outcome metrics. One item of data represents one outcome payment (to one outcome metric) and is defined as:

|  |  |
| --- | --- |
| Outcome Metric Id - (Value) | A within-project original, flexible identifier to be referenced in another sheet. This can be set by a GO Lab analyst. |
| Outcome Metric Id - (Value) | A within-project original, flexible identifier to be referenced in another sheet. This can be set by the GO Lab team. This ID should be equal to the ID that was stated in the “Results” and “Outcome metrics” sections. These identifiers could be ‘outcomemetric1’, ‘outcomemetric2’, etc.  |
| Period - Start - (Value) | Start date of claim period. |
| Period - Start - (Value) | Start date of period when service providers and/or investors can claim for outcome payments.   |
| Period - End - (Value) | End date of claim period. |
| Period - End - (Value) | End date of period when service providers and/or investors can claim for outcome payments.  |
| Payer Organisation ID - (Value) | INDIGO ID of organisation that is paying for outcomes. |
| Payer Organisation ID - (Value) | INDIGO unique ID of the organisation that is paying for outcomes (in most cases, this organisation will be the outcome funder/s listed in the ‘Outcome Payment Commitments’).  |
| Recipient Organisation ID - (Value) | INDIGO ID of organisation that is receiving payment for outcomes. |
| Recipient Organisation ID - (Value) | INDIGO unique ID of organisation that is receiving payment for outcomes. Depending on the governance structure of the SIB, different organisations could be claiming for outcome payments. In some cases, the service providers have this role. In other cases, it is the social investor or even the organisation leading the SPV.   |
| Type - (Value) | Codelist options are:* Planned
* Actual
 |
| Type - (Value) | Any outcome payment could be planned or actual. Planned outcome payments are those that have been forecasted by the outcome funder/payer during the design and structing of the impact bond. Actual outcome payments are effective transactions that occurred between the outcome funder and the claiming organisations in a fixed period.   |
| Payments - Currency - (Value) | Currency in which outcome payments are reported for this project. |
| Payments - Amount - (Value) | Amount of outcome payments received in this period in relevant currency. |
| Payments - Amount USD - (Value) | Amount of outcome payments received in this period in USD. |
| Payments - Amount USD - (Value) | Amount of outcome payments received in this period in USD. The GO Lab team does the conversion using the exchange rates provided by the World Bank here.  |
| Sources | Source of information about outcome payments.   |
| Notes | Notes on outcome payments.   |

# Open Contracting

The OCDS (Open Contracting Data Standard) is a standard that enables disclosure of data and documents at all stages of the contracting process by defining a common data model and unique identifiers for documents. An explanation of how the Open Contracting Data Standard work can be found here: <https://standard.open-contracting.org/latest/en/>

This is a list. One project can have multiple items of data as one impact bond project can be associated with various procurement processes. One item of data is defined as:

|  |  |
| --- | --- |
| OCID | Open Contracting unique identifier (OCID) of a procurement process associated with this impact bond project. |
| Sources | Source of information about procurement documents and OCIDs.   |
| Notes | Notes on procurement documents and OCIDs.  |

# 360Giving

The 360Giving Data Standard enables the disclosure of data on grants and grant making. An explanation of how the 360Giving Standard works can be found here: <https://standard.threesixtygiving.org/en/latest/>

This is a list. One project can have multiple items of data as one impact bond may have received more than one grant. One item of data is defined as:

|  |  |
| --- | --- |
| Grant ID | 360Giving identifier that links this impact bond project with data on received grants. |
| Sources | Source of information about grants and 360Giving IDs.  |
| Notes | Notes on grants and 360Giving IDs.  |

# Documents

This is a list of supporting documentation for this project. Documents include press releases, interim reports, final reports, case studies, etc. One project can have multiple items of data. One item of data is defined as:

|  |  |
| --- | --- |
| Title - (Value) | Title of related document or case study. |
| URL - (Value) | URL of related document or case study. |
| Notes | Notes on supporting documents.   |

# Scenarios

Stakeholder organisations may forecast different scenarios for one impact bond project. For instance, the best-case scenario will coincide with the achievement of all possible social outcomes. Organisations may plan for the situation where the project does not achieve social outcomes as expected.

This is a list. One project can have multiple items of data as one project may plan for different scenarios. One item of data is defined as:

|  |  |
| --- | --- |
| Scenario Id | A within-project original, flexible identifier to be referenced in another sheet. This can be set by the GO Lab team. These identifiers could be ‘scenario1’, ‘scenario2’, etc. |
| Name - (Value) | Scenario name. These names could be ‘best-case scenario’, ‘medium-case scenario’, ‘worst-case scenario’, etc.   |
| Overall project finance - Maximum potential outcome payment - Currency - (Value) | Currency in which maximum potential outcome payment is reported for this project.   |
| Overall project finance - Maximum potential outcome payment - Amount - (Value) | Maximum potential outcome payment according to a particular scenario (e.g.: maximum potential outcome payment in the worst-case scenario).  |
| Overall project finance - Maximum potential outcome payment - Amount USD - (Value) | Maximum potential outcome payment according to a particular scenario in USD (e.g.: maximum potential outcome payment in the worst-case scenario in USD). The GO Lab team does the conversion using the exchange rates provided by the World Bank here.  |
| Sources | Sources of information about the different scenarios.   |
| Notes | Notes on scenarios.  |

# Social Investment Prototype

The Social Investment Prototype offers additional tabs to describe technical assistance and some financial aspects of projects in greater detail, including individual transactions.

This first set of variables is in the General Overview tab:

|  |  |
| --- | --- |
| Social Investment Prototype - (Value) | Codelist options are:* YES
* NO
 |
| Social Investment Prototype - (Value) | If the project has a ‘YES’ in this variable, it has data for the Social Investment Prototype tabs.   Codelist options are: * YES
* NO
 |

Expected and latest internal rates of return can be recorded on the investment details table.

|  |  |
| --- | --- |
| Investment Details - Total Funds Invested - Latest - Currency - (Value) | The currency of the investment data provided. |
| Investment Details - Total Funds Invested - Latest - Currency - (Value) | Currency in which investment details are reported for this project.  |
| Investment Details - Total Funds Invested - Latest - Amount - (Value) | The total invested amount to date. |
| Investment Details - Total Funds Invested - Latest - Amount - (Value) | Total amount of funds invested up to date.  |
| Investment Details - Total Funds Invested - Latest - Amount USD - (Value) | To be calculated by GO Lab staff using the year in the above date and World Bank data available online at https://data.worldbank.org/indicator/PA.NUS.FCRF [Note that this variable does not capture and may misrepresent fluctuations over different years. This is an issue being tackled in the prototyping process.] |
| Investment Details - Total Funds Invested - Latest - Amount USD - (Value) | Total amount of funds invested up to date in USD. The GO Lab team does the conversion using the exchange rates provided by the World Bank here. [Note that this variable does not capture and may misrepresent fluctuations over different years. This is an issue being tackled in the prototyping process.] |
| Investment Details - Total Funds Invested - Latest - Date - (Value) | The date. |
| Investment Details - Total Funds Invested - Latest - Date - (Value) | Latest date for which investment details are reported.   |
| Investment Details - Internal Rate of Return - Target - (Value) | The targeted rate of return of an investment on the project after all costs have been considered, to determine profitability (net IRR) |
| Details - Internal Rate of Return - Target - (Value) | The targeted rate of return of an investment on the project, after all costs have been considered, to determine profitability (this value should be equal to net IRR).  |
| Investment Details - Internal Rate of Return - Latest - (Value) | The latest actual rate of return of an investment on the project after all costs have been considered, to determine profitability. Reported as date below. If actual IRR is not being reported seek to indicate if Actual IRR exceeds Target IRR (yes/no) |
| Investment Details - Internal Rate of Return - Date - (Value) | Latest date for which actual/latest internal rate of return is reported.  |
| Investment Details - (Source ID’s) | Sources of information about investment details.   |
| Investment Details - (Notes) | Notes on investment details.   |

# Transactions

The transactions tab is designed as a ledger of money in and money out of a project.

A transaction is modelled with a sending organisation and a receiving organisation, a date and an amount. All these fields are required.

The value of a transaction (Amount) must be positive.

A transaction can be linked to the project as a whole (the default) or to a:

* Outcome payment (using the Outcome Metric ID column to link to the relevant row on the Outcome Metrics tab);
* Investment (using the Investment ID column to link to the relevant row on the Investment tab); or,
* Grant (using the Grant ID column to link to the relevant row on the Grants tab).

Only one of these IDs should appear per row. Transactions should be disaggregated where possible. This is particularly important if the data is to be used in further analysis or visualisations.

The transaction type field is used to identify the purpose of the transaction.

The formatting rules on dates and currency values should be followed.

This is a list. One project can have multiple items of data. One item of data is defined as:

|  |  |
| --- | --- |
| Investment Id - (Value) | A within-project original, flexible identifier to be referenced in another sheet. |
| Outcome Metric Id - (Value) | A within-project original, flexible identifier to be referenced in another sheet. |
| Grant Id - (Value) |  |
| Date - (Value) | Date when the transaction occurred. |
| Sending Organisation ID - (Value) | INDIGO ID of the organisation that makes the transaction. |
| Sending Organisation ID - (Value) | INDIGO unique ID of the organisation that makes the transaction.  |
| Receiving Organisation ID - (Value) | INDIGO ID of the organisation that receives the transaction.  |
| Receiving Organisation ID - (Value) | INDIGO unique ID of the organisation that receives the transaction.  |
| Transaction Type - (Value) | This variable specifies whether the transaction is a debt or repayment of debt, equity, payment for an outcome or other type of transaction. Codelist options are:* Debt
* Grant
* Equity
* Debt and Equity
* Interest Payment
* Capital Repayment
* Capital Repayment and Interest
* Outcome Payment
* Other
 |
| Money - Currency - (Value) | Currency in which transaction data is reported. |
| Money - Currency - (Value) | Currency in which transaction data is reported for this project.  |
| Money - Amount - (Value) | Total amount of the transaction in relevant currency. |
| Money - Amount USD - (Value) | Total amount of the transaction in USD. |
| Money - Amount USD - (Value) | Total amount of the transaction in USD. The GO Lab team does the conversion using the exchange rates provided by the World Bank here.  |
| Sources | Sources of information about transactions.  |
| Notes | Notes on transactions.   |

# Technical Assistance

Technical Assistance (TA) is modelled as a period of engagement between a funding organisation and a recipient organisation with a defined start and end date.

This period of engagement can be broken down on the Technical Assistance Details tab into a series of component activities (as well as high-level information that covers the whole engagement where appropriate).

An activity is linked to an engagement by using the relevant id from the Technical Assistance tab. Multiple activities can be linked to a single engagement.

Data should not be provided if no technical assistance from a given category has been given, i.e., zero values are not necessary but assumed in the absence of data.

Each activity can be assigned a cost and a cost type and a time cost in days.

Where no cost is available, or where a cost is inappropriate, a row can be added with the relevant category selected and the value and cost type fields left blank. This will allow activities to be analysed as simple counts.

Activities can be further classified by the delivery approach.

On the Technical Assistance tab, there is a list. One project can have multiple items of data. One item of data is defined as:

|  |  |
| --- | --- |
| Id | A within-project original, flexible identifiers to be referenced in another sheet. This can be set by any analyst. The outcome is what changes for an individual as the result of a service or intervention. |
| Id | A within-project original, flexible identifiers to be referenced in another sheet. This can be set by any analyst. These identifiers could be ‘technicalassistance1’, ‘technicalassistance2’, etc.   |
| Title - (Value) | A summary name for this element of TA. Note that each project may have multiple elements of TA. TA may be broken into different elements as necessary to allow the category, cost and/or other variables to be completed. |
| Description - (Value) | Description of this element of TA. |
| Period Start - (Value) | Date when this specific element of TA starts |
| Period End - (Value) | Date when this specific element of TA finishes. |
| Funding Organisation Id - (Value) | Id of the organization that pays for technical assistance. |
| Recipient Organisation Id - (Value) | Id of the organization that receives technical assistance.  |
| Currency - (Value) | Currency in which costs of TA are described. |
| Sources | Sources of information about technical assistance to this project.  |
| Notes | Notes on technical assistance  |

# Technical Assistance Details

On the Technical Assistance Details tab, there is a list. One project can have multiple items of data. One item of data is defined as:

|  |  |
| --- | --- |
| Technical Assistance Id - (Value) | A within-project original, flexible identifier to be referenced in another sheet. |
| Title - (Value) | A summary name for this element of TA. |
| Description - (Value) | A description of this element of TA. |
| Category - (Value) | This variable has a long list of options. TA should be broken into elements and one item from the list be selected for each element.Codelist options are:* Overall TA - Planning - Project Management
* Overall TA - Planning - Commissioning
* Overall TA - Delivery - In-house Relationship
* Overall TA - Delivery - In-house Specialist
* Overall TA - Delivery - Pro-bono Partner
* Overall TA - Delivery - External Consultant
* Overall TA - Delivery - SPO Staff Member
* Theory of Change and Impact Strategy - Support to develop the Theory of Change and Impact Strategy
* Theory of Change and Impact Strategy - Support to develop an evaluation framework and performance measures
* Developing an Impact Measurement System
* Fundraising - Assistance securing funding from other sources
* Fundraising - Use VPO's reputation to help grantees secure funding from other sources
* Fundraising - Practical support with fundraising
* Fundraising - Fundraising advice or strategy
* Fundraising - Assistance securing follow-on funding
* Revenue Strategy - Business Planning
* Revenue Strategy - Business Model Development or Business Model Canvas)
* Financial Management - Sound Financial Management Capabilities or Financial Management Tools
* Financial Management - Develop Financial Systems
* Financial Management - Financial Management Advice
* Financial Management - Financial Planning or Accounting
* Financial Management - Support To Establish New Financial Systems
* Human Capital Support - Strengthening CEO And Management Team (Coaching And Mentoring
* Human Capital Support - Recruitment And Talent Provision
* Governance Support - Support to Develop Board of Directors
* Governance Support - Advice or Assistance to Strengthen the Board or Governance System
* Governance Support - Board Development or Governance Assistance
* Governance Support - Assistance in Recruitment of New Board Members
* Strategic Support - Strategy Consulting
* Strategic Support - General Management Advice
* Strategic Support - Strategic Planning Advice
* Strategic Support - Support to Develop the Business Strategy
* Strategic Support - Support to Develop New Products or Services
* Strategic Support - Support to Develop New Business Systems or Procedures
* Strategic Support - Advice on management of change
* Operational Support - Marketing
* Operational Support - Operational Management
* Operational Support - Technical Assistance in Specialist Areas
* Operational Support - ICT Advice
* Operational Support - Support on Procurement
* Operational Support - Estate Management or Access to Physical Space
* Operational Support - Legal Advice
* Funding - Financing Capacity Building Grants and Awards - Specific money allocated for non-financial support
* Funding - Financing Capacity Building Grants and Awards - VPOs and VPO’s funders allocate specific resources to non-financial support
* Funding - Financing Unrestricted Grants or Funding - Give unrestricted funding for capacity building
* Funding - Financing Unrestricted Grants or Funding - VPOs and VPO’s funders allocate specific resources to non-financial support/external donations
* Funding - Financing Grants and Contacts with External Capacity-building Providers - Develop Network of Capacity-building Providers
* Funding - Financing Grants and Contacts with External Capacity-building Providers - External Parties Giving Support For Free
* Funding - Financing Capacity Building Through Collaboration Among Funders And Beyond - Investors Team Up To Address Capacity-building Challenges
* Funding - Financing Capacity Building Through Collaboration Among Funders And Beyond - VPOs and VPO’s Funders Allocate Specific Resources to Non-financial Support
* Funding - Financing Management Fees
* Funding - Financing the SPO to Pay for Non-financial Support or Matching
* Funding - Financing Corporate Partners
* Funding - Financing a VPO Subsidy
 |
| Approach - (Value) | This variable captures different approaches in which a social investor can deliver TA.Codelist options are:* SPO Board Seat (including Observers)
* Coaching and mentoring
* Trainings, Workshops and Boot Camps
* Conferences and Other External Events
* Access to Networks (External or Peers)
* Specific Expertise (One-to-One or Groups)
* Mentoring
* Informal Relationship Management and Ad Hoc Support
* Other Approach
 |
| Cost Type - (Value) | Codelist options are:* Purchased or spent
* In-kind
* Staff cost
* Other
 |
| Cost of Activities - Amount - (Value) | Cost of Technical Assistance activities in relevant currency. |
| Cost of Activities - Amount USD - (Value) | Cost of Technical Assistance activities in USD. |
| Cost of Activities - Amount USD - (Value) | Cost of Technical Assistance activities in USD. The GO Lab team does the conversion using the exchange rates provided by the World Bank here.  |
| Number of Days - (Value) | Cost of Technical Assistance activities in days of work. |
| Sources | Sources of information about technical assistance details.  |
| Notes | Notes on technical assistance details.  |