

Rural Transportation
& Social Inclusion

願景工程社會影響力—— 以改善偏鄉交通為例



這張本報封面，讓許多人印

交通部「一六六」計畫，各縣市均有計畫使用，不使公共運輸的原因中，認為是「較貧弱」的地區，比率最高就在台北市。這代表，雖使台北市擁有最多的公共運輸資源，仍有嚴重的結構性問題有待調整。

相較偏鄉之空載運具，都會區新開發區域雖有寬大的人行道、無障礙大樓，但仍需要走很遠的路，轉乘多次才能抵達。區域內路網不斷的轉機，出口處缺乏電梯的捷運站，對老人移動都充滿不友善。

而欠缺適量的人親密的駕駛人及人本精神的交通工程設計，導致行人選擇身心人數居不下。其中長者更是主要的受害者，不幸遭撞死的行人中高達六成五都是六十五歲以上的老人。

隨著台灣急遽老化，可預見高齡者移動問題只會日益嚴重。

聯合體系願景工程推出一體化的「正義」四部曲，首部曲「行的難民」今起連兩天登場，分別從偏鄉、都會探討當老人成為車輛高危險群時，背後來自長期被漠視的高齡交通平權，當台灣跨入高齡社會之際是否已做好準備？相關新聞見A3



的難民

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Rural Transportation and Social Inclusion
Vision Project, United Daily News Group
Social Return on Investment (SROI) - Evaluation Report

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Summary

Project Target

The Vision Project, United Daily News Group uses special reports to disclose needs of society that were neglected in the past, and draws the government and society's attention to rural transportation and social inclusion issues. It also integrates resources from various parties and sectors and demonstrates the power of media. The Vision Project further utilized the SROI methodology to analyze the impact of the special reports and workshop on rural transportation and social inclusion, and evaluated its contribution to policy implementation and local impact. The Vision Project examined the actual benefits of the project on improving rural transportation and social inclusion, and continued to adjust the direction of the Project, in order to maximize the social value of media.

Research Methodology

This study utilizes social return on investment (SROI) methodology to conduct evaluation research and measurement. The research and analysis framework of this report follows “A Guide to Social Return on Investment” (2012 revised edition, or “a Guide to SROI” for short) published by the UK government. The process strictly abides by six stages and seven principles of SROI methodology. The Project evaluation is based on the results of the interviews with stakeholders, including the changes and effect they claimed contributed by this project.

Scope of Study

This study evaluates the benefits and impacts created by a series of reports on rural transportation and social inclusion as well as the “Flipped rural transportation workshop” organized by the Vision Project, United Daily News Group between May 27, 2018 and December 31, 2020.

Research Results

A comprehensive survey and analysis of this study shows that the Project has created the equivalent of NT\$23.99 in social value for every NT\$1 invested. The sensitivity analysis placed the result between NT\$12.65 and NT\$38.98. The Project's top three outcomes in terms of value were "Drew attention to and reflection on the issue of rural transportation and social inclusion," "Elevated transportation safety," and "Expanded and accelerated the implementation of current policy." The audience was the most significantly impacted stakeholder with a relatively large population, which shows the breadth of the project's impact. Whereas the depth of the Project's impact can be observed in the government and service users. The purpose of the Project is to “Create an impact and change policies”, in hopes of using media's positive force to make Taiwan a better place. By utilizing SROI methodology, we gain feedback from

different stakeholders and calculations of the value of related outcomes, which can be seen as objective and quantified data. According to those feedback and calculations, we clearly found that the Project not only drew public attention to the issue of rural transportation and social inclusion, but also facilitated the implementation of governments' policy , which show the Vision Project's years of contribution to society.

We also discussed the result and the stakeholders' feedback received during the process of the study with the Vision Project, United Daily News Group, in order to look for ways to improve and optimize the project. This report was intended to allow adjustments and corrections whenever needed during the future implementation process, and to maximize the project's impact, social value, and benefits.

Chapter 1 Rural Transportation and Social Inclusion

Section I Project Information

The media has significant influence on social progress and shaping the culture of modern society. It is widely recognized as an important force of society that independently supervises government, discloses the dark side of our society, and exercises the right to speak on behalf of the public. The United Daily News Group is one of Taiwan's four major news groups. Besides observing social issues and reporting events, the group hopes to play an even more active role in that it not only reports on public issues, but also finds a solution and takes action. Hence, the United Daily News Group launched the Vision Project when it celebrated its 60th anniversary in 2011 under the goal to create an impact and change policies. The Vision Project reports on topics from different perspectives and takes action in hopes of bringing positive change to Taiwan. The issue of rural transportation and social inclusion has been a key topic of the Vision Project in recent years.

According to statistics of the Ministry of Transportation and Communications (MOTC), deaths caused by traffic accidents in Taiwan mainly involve scooters, elderly, and drunk driving. Despite the government calling on the elderly to pay attention to traffic safety and implementing safety policies, results have not been ideal in rural areas, and dangerous driving by elderly people remains common. The Project began publishing a series of reports on rural areas in 2018 to determine the root cause and find a solution. The reports were titled as “Transportation justice” and disclosed information on its headline and all major social media, drawing public attention to this important issue that has been neglected for years. It also led government agencies improve and adjust their policies.

Improving rural transportation and social inclusion has always been a key issue at the MOTC, but it has not been able to satisfy transportation needs due to rural areas being sparsely populated and the central government not having sufficient information on demand. The Vision Project's reports on “Transportation justice” helped the central government clearly understand the needs of local community, and accelerated the implementation of supporting transportation measures. When Lin Chia-lung held key positions in the office of minister of transportation and communication in 2019, he listed the improvement of rural transportation and social inclusion as one of the MOTC's main missions based on the philosophy of "Humanity-Oriented Transportation." However, merely seeing change in the local community was not enough for the Vision Project. It had to verify that the overall issue was effectively resolved, so the Project re-visited rural areas in 2020 to understand the current status of transportation in rural areas. The Vision Project once again disclosed issues it found on newspapers and social media, and actively organized a workshop called “Flipped rural transportation workshop”, inviting government agencies, and academics to put their heads together. This led to the government further relaxing regulations to allow personal-use vehicle to participate in mass transportation in rural areas. The government integrated resources across government departments to meet the basic need for transportation.

Scope and Goals

- Scope of evaluation: The Project's reports on rural transportation and social inclusion (including reports on print and digital media between May 2018 and December 2020) and the Flipped rural transportation workshop held on July 29, 2020
- Evaluation period: From 2018.05.27 to 2020.12.31
- Objective and vision: The reports describe the difficulty of getting around in rural areas, and aim to create an impact on policies, encouraging government and society to work together in improving rural transportation and social inclusion, and meet the basic need for transportation.
- Event description:
At the end of May 2018, the Project launched the media report of “Transportation Justice 1.0”, which used Pingtung Xuhai Village and Chiayi Zhouzi Village as examples to draw public and government attention to the dilemma of rural transportation and social inclusion. As the government began to respond to issues in these two villages by arranging for local bus operators to make a detour and planning the route of “Happiness Bus”, The Vision Project continued to report on developments at the end of 2018 and 2019.

After observing government measures to improve rural transportation and social inclusion, the Vision Project launched the media report of “Transportation Justice 2.0” in March 2020, and once again reported on the issues of rural transportation and social inclusion as well as improvements under the new policy. The reports further pointed out deficiencies in the government's new policy, and focused on resource integration.

The Vision Project organized” Flipped rural transportation workshop” in July 2020, and invited government officials from central government (MOTC, Ministry of Health and Welfare, and Ministry of Education) and local governments (New Taipei City, Taichung City, Yilan County, and Pingtung County), as well as academics to discuss solutions for rural issues. They integrated resources during the workshop and verified the direction for relaxation regulations on using personal-use vehicle to carry passengers in rural areas. In November 2020, the MOTC announced the law amendments and implemented the project of "Happiness Bus 2.0" on a trial basis in December the same year. This was reported and disclosed by Vision Project at the same time.

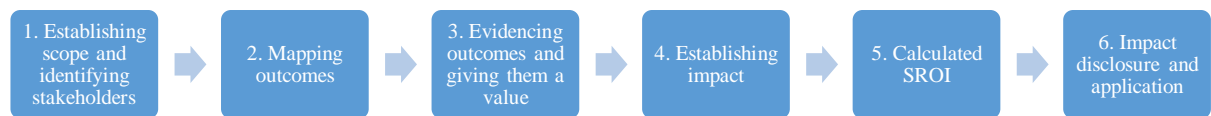
Overall, the Vision Project's impact on rural transportation and social inclusion can be divided into two phases, "policy implementation" and "local impact": Its impact on "policy implementation" refers to raising public awareness and attracting the government's attention, forcing the government to make policy amendments by expanding/accelerating the implementation of current policies or further relaxing regulations. The "local impact" refers to the impact on residents in Zhouzi Village, Dongshi Township, Chiayi County and Xuhai Village, Mudan Township, Pingtung County, the two rural areas that were reported on.

Chapter 2 Research Methodology

Section I Research Methodology

The Project is evaluated based on Social Return On Investment (SROI), which was released by the Office of the Third Sector, Cabinet Office, UK. The tool can effectively measure and evaluate the tangible and intangible impacts and changes brought by companies and organizations to society, the environment, and the economy. SROI gives the changes a monetary value and shows the causality between the Project's inputs and outcomes. The analysis process comprises six stages and complies with seven major principles¹.

1. Six stages



2. Seven major principles

- (1) Involve stakeholders
- (2) Understand what changes
- (3) Value the things that matter
- (4) Only include what is material
- (5) Do not over-claim
- (6) Be transparent
- (7) Verify the result

Among the seven major principles, the most important and also the most special one in this methodology is involve stakeholders. SROI emphasizes bottom-up collection of data and engagement with stakeholders directly through face-to-face interviews and questionnaire surveys, and understanding of how the stakeholders feel and their thoughts in order to gain insights into the actual benefits provided by the project and to accordingly find room for further improvement, fulfilling the purpose of management and expanding the social impact of an enterprise.

Section II Limitations of the Study

In the SROI methodology, we give abstract, narrative or non-quantitative indicators a monetary value. Using the assumed variables as adjusting factors (such as deadweight and drop-off), the values are determined based on stakeholders' perception instead of conventional models for predictive financial analysis. As a result, the SROI of this project cannot be compared with the SROI of a different project. In the light of this, apart from the SROI outcomes, we should also disclose the SROI report in a responsible manner and clearly explain the outcomes as well as the processes of

¹ Please refer to Appendix 1, Reference 1

calculation and derivation. It is also necessary to fully describe the various assumptions and sensitivity analysis used in the process. We hope that users of the report will be able to understand the project and its social value with the complete information provided, from which the basis for activity management and maximizing social value and other decisions can be derived.

SROI studies are like regular studies and have their limitations. We evaluated the possible limitations in all aspects of the seven major principles, and hope that readers of this report will fully understand the limitations of this study, as well as the measures we took in response to these limitations. Limitations of the study are further described below.

Principle	Limitations of the Study	Possible Effects on SROI Outcomes	Response Method
I. Involve stakeholders	<ol style="list-style-type: none"> 1. Due to the massive readers/audience , it is hard to determine the actual number of people who saw the report and hard to directly reach them. 2. Engagement is difficult due to the large number of government agencies that were involved in decision-making and implementation. 	SROI ratio overestimation or underestimation	<ol style="list-style-type: none"> 1. Since it is hard to determine the actual number of readers/audience, we chose to use the number of members in the Vision Project as the population of the audience based on the principle of Do Not Over-claim. We also included readers that interacted after the article was posted on an online platform in the sensitivity analysis. Furthermore, we conducted a large scale questionnaire survey and randomly interviewed 1 person, using statistical methods to ensure the adequacy of questionnaire samples for determining audience outcomes. 2. We first analyzed the implementation status of public transportation by the MOTC in each county and city², as well as administrative performance or business overview reports in recent years³, the MOHW's Long-term Care 2.0 Project⁴, and the Pilot Project for Increasing Transportation Capacity in

² Please refer to Appendix 1, Reference 3

³ Please refer to Appendix 1, References 17-22

⁴ Please refer to Appendix 1, Reference 23

Principle	Limitations of the Study	Possible Effects on SROI Outcomes	Response Method
			<p>Areas with Insufficient Long-term Care Resources⁵. We visited scholars that took part in the government's policy formation or was working together with government's programs, in order to first understand the issues that the government is concerned about and possible impacts of the Project, and then determining outcomes on this basis. Next, we interviewed the minister of transportation and communications to verify outcomes.</p> <p>3. Different engagement methods are used based on the different attributes of stakeholders, including face-to-face interviews, telephone interviews, and online questionnaires, so that subjects would be more willing to respond.</p>
II. Understand what changes	<ol style="list-style-type: none"> 1. Elderly service users in rural areas cannot clearly express the impact or changes they have experienced 2. Policy formation took relatively long, and relaxation of regulations was not completed until near the Project's deadline. Some potential 	SROI ratio overestimation or underestimation	<ol style="list-style-type: none"> 1. We conducted face-to-face interviews with elderly service users to gain a preliminary understanding of their opinions. We also followed <i>A Guide to Social Return on Investment</i> in an attempt to find individuals that can speak on their behalf. After discussion with the Vision Project team, we found that the person in charge of a local organization took care of elderly people in rural areas almost every single day. We believe that she can provide the most realistic and reasonable answers on behalf

⁵ Please refer to Appendix 1, Reference 24

Principle	Limitations of the Study	Possible Effects on SROI Outcomes	Response Method
	<p>outcomes may be still developing and not all possible outcomes could be reviewed at once.</p> <p>3. The policy influenced by the reports may have nation-wide impact, and not just lead to changes in the two villages that were reported.</p>		<p>of elderly people based on her daily observations and experience caring for elderly people around her, allowing us to understand possible outcomes in stakeholders. Considering the difficulty elderly people have filling out questionnaires on paper, we asked local organizations that provide care services to elderly people to ask the elderly people questions, and elderly people answered by raising their hands. The local organizations then documented the results.</p> <p>2. Not only referencing several government project reports and news reports⁶, we directly engaged government officials several times to find all possible impacts and results.</p> <p>3. We adopted stricter threshold by only including the changes, inputs, and outputs of the two villages that were reported to prevent overestimating outcomes. The potential impact nationwide was included in the sensitivity analysis.</p>
<p>III. Value the things that matter</p>	<p>The risk of traffic accidents must be considered when assessing the value of “Elevated transportation safety”, but the information is hard to collect</p>	<p>SROI ratio overestimation or underestimation</p>	<p>We first analyzed official statistics of traffic accidents in Taiwan involving elderly people, and found that only the nation-wide traffic accident rate was disclosed. However, most accidents were occurred in urban areas which were not similar with the Project's scope, and the frequency of traffic accidents does not reflect on the</p>

⁶ Please refer to Chapter 3, Section 2 Project Outputs and Appendix 1, References 3-7

Principle	Limitations of the Study	Possible Effects on SROI Outcomes	Response Method
			<p>actual risk of elderly drivers in rural areas.</p> <p>We further assumed that if residents of rural areas took vehicles driven by elderly drivers, they were at risk of being in at least one traffic accident a year. We also reviewed literature ⁷ for the compensation amount if a traffic accident occurs, and evaluate the risk value that can be avoided by not taking vehicles with elderly drivers, using it as a financial proxy for the outcome “Elevated transportation safety”. We also considered different sources of data and hypotheses, and used them in the sensitivity analysis.</p>
IV. Only include what is material	Stakeholders might feel that all outcomes were important	SROI ratio overestimation	We used a questionnaire designed with a threshold, and only outcomes with changes that exceeded the threshold were included in the assessment. We also verified results with stakeholders through a two-phase engagement process.
V. Do not over-claim	Some financial proxies are based on hypotheses.	SROI ratio overestimation	Sensitivity analysis is performed for uncertain parameters, such as the financial proxy “Elevated transportation safety”.
VI. Be transparent	The information within the complete impact map of the report may not be completely presented due to layout restrictions.	Misunderstanding by report readers	Explanations given in study Appendix and excerpts of compiled results presented in main study text.
VII. Verify the result	Due to constraints on research resources and time, not all of the	SROI ratio overestimation or underestimation	Through the two phases of engagement, literature review ⁸ , and discussion of the research hypothesis and outcomes with

⁷ Please refer to Appendix 1, References 4 and 8-9

⁸ Please refer to references in Appendix 1

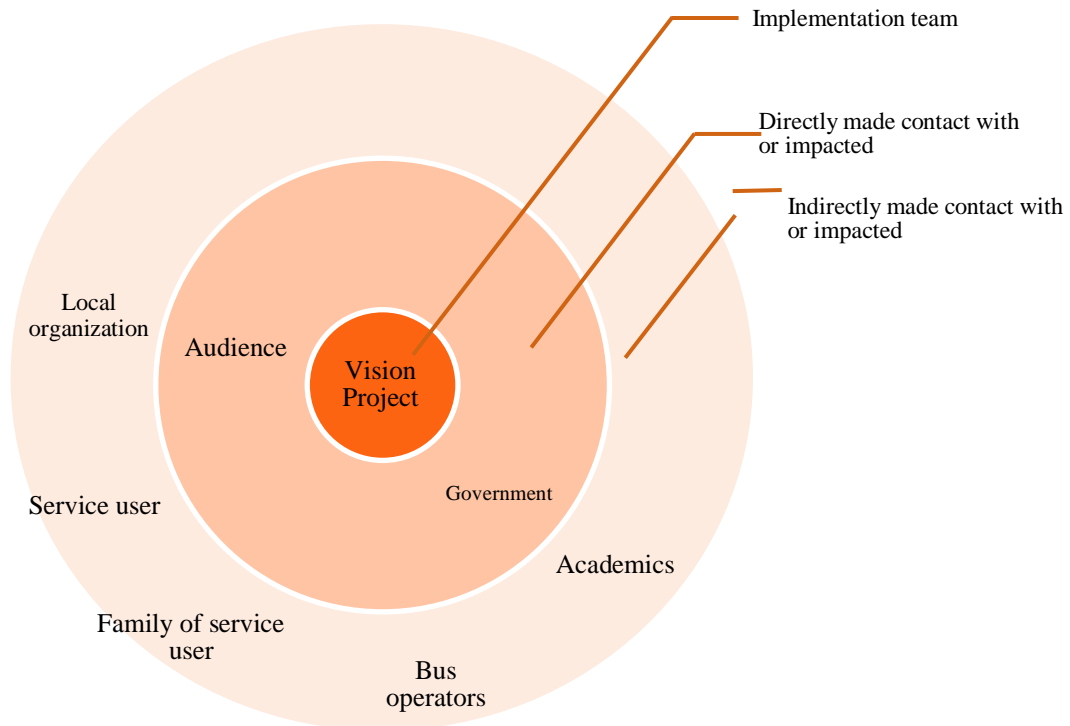
Principle	Limitations of the Study	Possible Effects on SROI Outcomes	Response Method
	stakeholders in the study were invited to participate in the verification of outcomes.		United Daily News Group, we verify that the calculated parameters do not excessively deviate.

Chapter 3 SROI Evaluation and Analysis

Section I Stakeholder Involvement

I. Stakeholder Identification and Scope

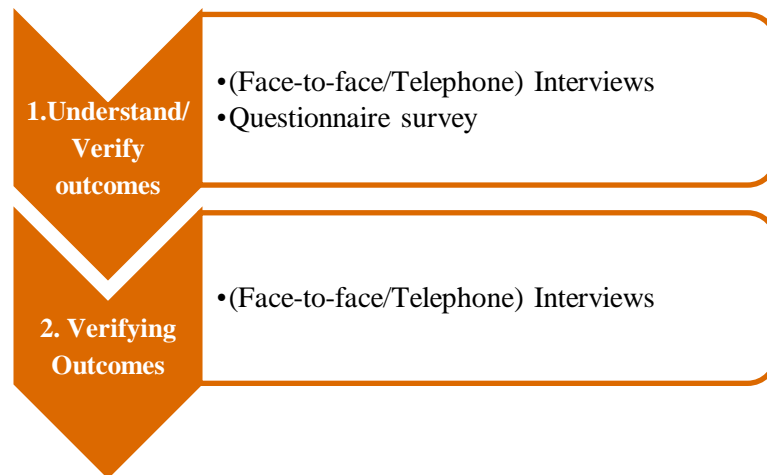
We identified and reviewed "all" individuals that were reached, influenced others, or were influenced in the process of the Vision Project. We divided the event's impact on stakeholders into three levels, namely implementation team, stakeholders that were directly reached/influenced, and stakeholders that were indirectly reached/influenced:



Stakeholder	Category	Description
Personnel of the Vision Project, United Daily News Group	Implementation team	Includes reporters, editors, interviewers, and project team, responsible for writing articles, submitting articles, and promotion.
Government	Directly made contact with or impacted	Includes central (MOTC) and local governments (county/city governments, Motor Vehicles Office, etc.) that responded to the reports by adjusting policies.
Audience	Directly made contact with or impacted	Saw the reports on the newspaper or online platform and changed their behavior and attitude, began to follow rural transportation and social inclusion issues, or made donations.
Service user	Indirectly made contact with or impacted	Residents of Xuhai Village, Mudan Township, Pingtung County and Zhouzi Village, Dongshi Township, Chiayi County were the main beneficiaries of mass transportation measures implemented after the reports.
Family of service user	Indirectly made contact with or impacted	Family members of residents of Xuhai Village, Mudan Township, Pingtung County and Zhouzi Village, Dongshi Township, Chiayi County worried less about residents taking dangerous transportation after the government improved public transportation in the rural areas.
Local organization	Indirectly made contact with or impacted	Xuhai Classroom Service Station is the main caretaker of elderly people and children in Xuhai Village, and also became the main contact for the outside world to donate supplies and/or become volunteer for “ Xuhai Village after the reports.
Bus operators	Indirectly made contact with or impacted	Chiayi Bus Company, Ltd. changed an existing bus route to go into Chiayi Zhouzi Village in coordination with government policy after the reports, in order to meet local transportation needs.
Academics	Indirectly made contact with or impacted	Promoters of the rural transportation and social inclusion policy whose research increased its impact after the reports, and continue to serve as advisors for policies on rural issues.

II. Stakeholder Engagement

We mainly engaged stakeholders in two phases to better understand the scope and extent of the Project's impact, please see Appendix 2 for the interview outline and questionnaire.



1. Understand/Verify outcomes:

- A. (Face-to-face/Telephone) Interviews: We interviewed a total of 29 stakeholders. During the interviews, we mainly used a semi-structured interview to discuss with stakeholders, constantly asking them: "Then what happened?" "Who participated?" "What changes did you go through?" We then generalized preliminary outcomes from their answers. Next, we asked stakeholders open-ended questions to verify whether any changes or impacts had been left out. Finally, we used a chain of events to describe the causality between the many changes and conclude on the final outcome. We engaged interviewees in multiple aspects during interactions to ensure that we understand all possibilities.
- B. Questionnaire survey: After summarizing the opinions expressed by stakeholders during interviews and reviewing literature⁹, we listed all possible outcomes of the Project, and then designed the questionnaire based on these outcomes. The questionnaire was distributed to all types of stakeholders within the scope of evaluation. Depending on the attributes of the stakeholder, we either randomly sampled stakeholders to fill out the questionnaire or had representatives fill out the questionnaire on their behalf. To ensure that stakeholders understood the questions and answered correctly, except for questionnaires distributed to the audience, which had a relatively large population, we explained each item and notices to the person filling out the questionnaire over the phone. When collecting the questionnaires, we also called the person who filled out the questionnaire and verified the answer to each item. This way we gained a complete and comprehensive understanding of the opinions and changes of all stakeholders within the scope of evaluation.

2. Validating outcomes:

⁹ Please refer to references in Appendix 1

When validating outcomes, we summarize stakeholders' feedback in the "understand/verify outcomes" phase, and conduct telephone interviews to validate the outcomes with each stakeholder. We also compared the outcomes with literature to verify that the outcomes are not biased and match the actual situation. Please see Chapter 4, Section 3: Verifying Outcomes for details of verification.

Stakeholder		Population Quantity ¹⁰	Understand/Verify outcomes		Verifying Outcomes	Number of times engaged
			Interviews	Questionnaire survey (Number of effective questionnaires collected)	Interviews	
Name	Subgroup					
Service user	General residents	45	19	38 ¹¹	1	58
	High risk residents	18				
Local organization	None	1	1	1	1	3
Bus operator	None	1	1	1	1	3
Government	None	1	6	2	2	10
Academics	None	2	2	2	2	6
Audience	None	16,618	1	796 ¹²	-	797

For service users, we randomly interviewed 19 villagers. For local organizations, we interviewed the founder and person in charge of Xuhai Classroom Service Station for the Elderly and Children. For bus operators, we interviewed the manager of Chiayi Bus Company, Ltd. For the central government, we interviewed Lin Chia-lung, minister of transportation and communication, and two of his staff members. For local governments, we interviewed the Director of Pingtung Motor Vehicles Office and an officer at Chiayi Motor Vehicles Office. For academics, we interviewed two professors who specialize in transportation policy. For the audience, we randomly interviewed 1 reader who read the Project's reports on transportation justice.

III. Identification and clarification of stakeholders

We determined whether to include or exclude stakeholders, and whether it was necessary to divide stakeholders into subgroups based on the type and extent of

¹⁰ Refers to the Project's time period (2018.05.27-2020.12.31), number of all participants in the Project's event

¹¹ Since service users are mainly elderly people, it is hard to ask every service user to fill out the questionnaire. Hence, we asked the person in charge of a local organization to organize a local event, during which 38 elderly people were asked items on the questionnaire and raised their hands in response. The answers were recorded by the local organization on their behalf.

¹² Due to the large population of the audience, we determined that at least 376 effective questionnaires had to be collected for a 95% confidence level and 5% sampling error. In the end, we collected 796 effective questionnaires and therefore determined the representativeness of engagement outcomes.

outcomes identified in each type of stakeholder. Our considerations and identification of stakeholders are as follows:

1. Inclusion and Exclusion of Stakeholders

Based on the combined engagements of the first (understand/verify outcomes) and second (verifying outcomes) phases, we have identified the main influencers and stakeholders in the project. In accordance with the SROI's principles of materiality and Do Not Over-claim, we have excluded stakeholders who experienced smaller or less significant impacts. Explanations for the inclusion or exclusion of stakeholders are as follows:

Stakeholder	Description	Included/Excluded
Vision Project, United Daily News Group	The Project aims to impact policy, residents of rural areas, and society as a whole. It does not focus on organizational changes. Hence, this was excluded after discussion with the Project team.	Excluded
Service user	Residents of rural areas are the main users of public transportation services the Project seeks to improve. These people were also the focal point of reports, received the most attention, and were directly impacted. In the engagement process during the "understand/verify outcomes" phase, we found significant changes in the attitude and behavior of these residents after rural transportation has been improved, and therefore included them in calculations.	Included
Family of service user	Based on feedback from service users in the "understand/verify outcomes" engagement phase, we found that even though family members worried less with the new rural transportation service, the impact was indirect and small, and was not the goal of reports by the Project. Hence, we excluded them from calculation.	Excluded
Local organization	Based on feedback from local organizations in the "understand/verify outcomes" phase of the engagement process, the local organization gained significantly higher recognition after being reported by the Project, and it brought a significant amount of additional supplies donations, which effectively improved the organizations' condition. Furthermore, the new policy also greatly reduced the manpower required by local organizations for picking up and dropping off elderly people. Hence, local organizations were included in calculations.	Included

Stakeholder	Description	Included/Excluded
Chiayi Bus Company, Ltd.	Based on feedback from Chiayi Bus Company, Ltd. in the "understand/verify outcomes" phase of the engagement process, the route changed in coordination with government policy significantly improved the image of Chiayi Bus Company, Ltd., and also encourage the company's employees and drivers. Hence, Chiayi Bus Company, Ltd. was included in calculations.	Included
Government	The government is one of the subjects that the Project's reports on transportation justice mainly aims to communicate with. The government is the competent authority capable of directly changing the current state of rural transportation and social inclusion and has the most resources. Based on feedback from the government in the "understand/verify outcomes" phase of the engagement process, central and local governments all indicated that the series of reports helped them see what people needed and accelerated the pace of policy amendment. Hence, government was included in calculations.	Included
Academics	Academics played an important role in providing professional know-how for reports, analyzing rural transportation and social inclusion issues, and providing the government with a direction for policy revisions. The Project's reports accelerated the speed that recommendations from academics for improving rural transportation and social inclusion became a part of policy, which gave them a greater sense of achievement. Hence, academics were included in calculations.	Included
Audience	The audience is the most direct recipient of news reports. Based on feedback from the audience during the "understand/verify outcomes" phase of the engagement process, a considerable percentage of the audience became more concerned about rural transportation and social inclusion issues after seeing the reports, and even became willing or actually made donations. They also affected their family and friends. Hence, the audience was included in calculations.	Included

2. Subgroup Identification

Stakeholder	Possible impact factors for subgroup division	Description of subgroup identification	Subgroup categorization results
Service user	<ol style="list-style-type: none"> 1. User's place of residence 2. Main means of transportation in the past 	<p>1. User's place of residence We visited Pingtung Xuhai Village and Chiayi Zhouzi Village in the process of this study. In the "understand/verify outcomes" phase of the engagement process, we found that the residents' purposes of going out of the villages in both places were extremely similar, and were mainly to go to the hospital, market, and occasionally group trips. Furthermore, we found that residents of Chiayi Zhouzi Village did not often take Happiness Bus since the service was launched due to the pandemic. Only 4 people regularly took the bus to work or school; the number of people was immaterial. Hence, we decided to combine the figures for the two villages and not divide stakeholders into subgroups.</p> <p>2. Main means of transportation in the past The Project's report pointed out that Pingtung Xuhai Village is located in a remote area that is difficult to access, and local residents relied on a personal-use vehicle driven by an elderly driver over the age of 80 for getting in and out. It is an over 2 hour drive through mountain roads from Xuhai Village to the downtown area and back, which is a considerable burden on the elderly driver, so there is relatively high risk of</p>	General residents/High risk residents

Stakeholder	Possible impact factors for subgroup division	Description of subgroup identification	Subgroup categorization results
		<p>passengers being in an accident. Even so, a considerable percentage of local elderly residents still choose to take the elderly driver's car due to their limited options. Considering that they have far higher risk of being in a traffic accident than regular citizens, we divided residents that often take the cars of elderly drivers (hereinafter referred to as "high risk residents") into a different subgroup.</p>	
Audience	Time the report was seen	<p>The Transportation Justice report series was first published in June 2018, and the Transportation Justice 2.0 report series was published starting June 2020. The Project posted related articles in their website and on social media along with promotional videos during the period, so the audience saw related articles between 2018 and 2020.</p> <p>In the "understand/verify outcomes" phase of the engagement process with the audience, questionnaire respondents said that they saw the reports between 2018 and 2020. After further analyzing the changes in attitude and behavior of audience members who saw the reports at different times, there was no significant difference, so we determined that it was not necessary to divide them into subgroups.</p>	Not divided into subgroups

Section II Inputs and Outputs

I. Project Inputs

Resources stakeholders input for project activities. With consideration to the scope and time of the Project's impacts, we separately calculated the inputs and outputs of "policy implementation" and "local impact."

1. Policy implementation

Stakeholder	Inputs		
Category	Item	Value of inputs (NT\$)	Remarks
Local organization	None	\$ 0	Local organizations were interviewees in the Project and did not provide any inputs
Government	Personnel expenses	\$ 125,000	The time cost of 50 central and local government officials participating in the "Flipped Rural Transportation Workshop" is calculated according to the Directions for Paying Attendance, Writing and Editing Fees of Central Governments Agency and School
Academics	Personnel expenses	\$ 52,100	The time cost of workshop discussion and participation is calculated using the hourly pay of professors
Audience	None	\$ 0	Only read the news reports, mostly online, so expenses are calculated at NT\$0
Vision Project, United Daily News Group	Personnel expenses	\$ 184,328	Includes additional bonuses, travel expenses, newspaper editor expenses, and social media editor expenses for the Project's reports (the latter two are calculated using the average monthly salary of editors and social media managers on the website 1111 Job Bank to calculate hourly pay and then multiplied by number of hours input)
	Workshop expenses	\$ 91,463	Software and hardware expenses for organizing the Flipped rural transportation workshop

	Online platform expenses	\$ 94,438	Social media promotion expenses for the Transportation Justice report series in 2018 and 2020, plus Social media editor expenses (calculated using the average monthly salary of social media managers on the website 1111 Job Bank to calculate hourly pay and then multiplied by number of hours input)
Total		\$ 547,329	

2. Local impact

Stakeholder		Inputs	
Category	Item	Value of inputs (NT\$)	Remarks
Service user	None	\$ 0	Service users are residents of rural areas who are able to take the Happiness Bus free of charge due to government subsidies, and therefore do not have any inputs.
Local organization	None	\$ 0	Residents of rural areas are currently able to take the Happiness Bus free of charge due to government subsidies, members of local organizations are also residents of rural areas and therefore do not have any inputs.
Bus operator	None	\$ 0	The government subsidized bus operators for routes through rural areas, and the cost of subsidizing bus route extension is already counted in the central government's policy expenses and not double counted here.
Government	Policy expenses	\$ 1,488,514	Chiayi Zhouzi Village and Pingtung Xuhai Village: Bus route extension & Happiness Bus expenses (calculated based on the amount of government subsidies approved for Chiayi Zhouzi Village and Pingtung Xuhai Village between 2018 to 2020)
	Personnel expenses	\$ 133,727	Personnel expenses for handling transportation affairs of Chiayi Zhouzi Village and Pingtung Xuhai Village (Number of participants reported by the

			stakeholder * Average hourly wage of civil servants * Number of hours)
Total		\$ 1,622,241	

II. Project Outputs

Quantifiable outcomes for each stakeholder group during the assessment period for the Project are described as follows:

Stakeholder	Item	Output quantity
Vision Project, United Daily News Group	Report on print media	80 articles
	Online reports	134 articles
	YouTube video	8
	Facebook post	18
	Flipped rural transportation workshop	1 session
Government	New Happiness Bus route for rural areas	2 routes
Bus operator	Bus route extended to rural areas	1



Report on print media (2018/5/28)



Report on the official website of the Vision Project

- <https://vision.udn.com/vision/cate/12118>
- **Driver in Pingtung knows the ATM card passwords of the entire village and has seen birth and seen all stages of life**
(2018/05/27) <https://vision.udn.com/vision/story/12129/3165861>
- **Only one or two minutes by bus, but their "Road to Heaven"**
(2018/05/28) <https://vision.udn.com/vision/story/12129/3165854>
- **The hardship of being in rural areas, difficult transit, elderly people would rather take gypsy cabs**
(2020/03/23) <https://vision.udn.com/vision/story/121037/4435254>
- **Exclusive interview/Lin Chia-lung: Gypsy cabs in rural areas, safety loophole**
(2020/04/01) <https://vision.udn.com/vision/story/12133/4462642>
- **Response/Lin Chia-lung agrees to unite departments in connecting the last mile in rural areas**
(2020/04/01) <https://udn.com/news/story/7266/4462207>
- **Turning around rural areas, central and local governments jointly discuss solutions**
(2020/07/30) <https://vision.udn.com/vision/story/121548/4741265>



YouTube video

- https://www.youtube.com/watch?v=F41M8ZJ26gk&list=PLj7djWVlhWHp4oR433-x3_71KjzNp-smB&index=4
- **[Vision Project – Examination of Transportation Justice] Far from town with few buses, 80 year old driver drives the entire village**
https://www.youtube.com/watch?v=e3iseRSfvDU&list=PLj7djWVlhWHp4oR433-x3_71KjzNp-smB
- **[Vision Project – Examination of Transportation Justice] Only one or two minutes by bus, but a "Road to Heaven" for elderly people**

https://www.youtube.com/watch?v=F41M8ZJ26gk&list=PLj7djWVlhWHp4oR433-x3_71KjzNp-smB

- **[Vision Project – Examination of Transportation Justice 2.0] Two dilemmas yet to be resolved, long-term care transport a bumpy road**

<https://www.youtube.com/watch?v=QGQ5aUQOmCs&list=PLj7djWVlhWHoAg2KAbqLVt7cS2bQsr9>



聯合報系願景工程(Vision Project)
4 December 2020 · 🌐

#體檢行的正義 🙌 #偏鄉交通

為解決偏鄉交通問題，交通部前年底試辦「嘆嘆共乘」，今年9月就預告修法，將 #放寬自用車加入市區公車業，目前法規已公告，即日起 #地方政府可依各自需求規畫及上路。

交通部說，對沒有市區公車或計程車願意服務偏鄉地區，縣市政府可規畫特殊服務方式，讓當地團體或個人成立市區汽車客運業經營，另也同時放寬申請立案程序、營運、票價以及資本額、車輛及場站、設備相關限制，便利在地資源投入。（完整文章：<https://bit.ly/2laLxS7>）

🚗【體檢行的正義】系列報導：<https://bit.ly/36Erlfh>

#聯合報系願景工程 #偏鄉交通 #偏鄉 #修法 #共享 #自用車 #大眾運輸

Facebook post

<https://www.facebook.com/udn.vision.project/posts/3748026958596206/>

Section III Assessing the Outcomes

I. Theory of Change

1. Policy implementation

✓ Local organization

Background:	
<p>Pingtung Xuhai Village is a village with severe outflow of the young population and has a high ratio of elderly people and children. Seeing the shortage of resources in the rural area and lack of proper care for elderly people and children, Pan I-Fang, who grew up in Xuhai Village, quit her steady job and returned to Xuhai Village to establish the Xuhai Classroom Service Station for the Elderly and Children, which provides local elderly people and people with disabilities with daycare, as well as after-class programs for children.</p> <p>The funding for establishing Xuhai Classroom Service Station for the Elderly and Children was from Pan I-Fang's savings and selling her house. Their budget is very tight since the service station needs to cover expenses for daily care and education service of nearly 130 elderly people and children in the village.</p>	
Outcome 1: Relieved financial burden	
Chain of events	After the Project reported on the dilemma of transportation in Xuhai Village under the theme "Examination of Transportation Justice," the popularity of Xuhai Classroom Service Station for the Elderly and Children significantly increased. Many citizens and organizations began to notice the issue of insufficient resources in the village, and actively provided funding or supplies to the organization. Some people even became long-term donors after understanding the organization's situation, and continue to donate daily supplies most needed by the organization, such as diapers, changing pad, toilet paper, and rice, significantly relieving the organization's financial burden.
Stakeholder feedback	We began to receive more supplies after the report, such as diapers for bedridden elderly people, which was our main expenses. Because of these donations, we have reduced our expenses considerably. We are grateful for the reports of United Daily News and these kind people.

✓ Government

Background:	
<p>The government has implemented numerous rural transportation and social inclusion policies over the years to meet citizens' basic need of public transportation. However, those basic needs have still not fulfilled in some rural areas that are hard to reach or inconvenient for a long time. Reports on rural transportation and social inclusion issues in the past have lacked multiple perspectives, continuity, or did not go into depth. There was a lack of media willing to dedicate long-term efforts to track</p>	

rural transportation and social inclusion issue based on the concept of "constructive journalism¹³", therefore, there was a shortage of complete and in-depth examples that could make the government aware of the importance of improving rural transportation and social inclusion, or bring external pressure to the government to take the issue seriously and come up with the timely solutions. Furthermore, even though government agencies, such as the MOTC, MOHW, Council of Indigenous Peoples, and MOE, have allocated resources for rural areas, they often provide the services, subsidies, and management measures with a narrow view. Without an integrated platform and system, the resources provided might not meet local needs, and will instead result in waste.

Outcome 1: Expanded and accelerated the implementation of existing policy

Chain of events After the Project published the series reports "Examination of Transportation Justice 1.0," these in-depth follow-up reports on transportation issues in Pingtung Xuhai Village and Chiayi Zhouzi Village raised public awareness and put growing pressure on the government or supervisory authority to do the field survey, engage in discussions and coordinate with companies and residents in the areas that were reported. The government also referenced media reports and empirical studies of academics to examine and revise policies. In the end, a bus route was extended into Chiai Zhouzi Village and the Happiness Bus project was implemented in Pingtung Xuhai Village.

Stakeholder feedback

- Staff members of the MOTC: For years government policies often devolve into departments operating independently, setting out from a supply perspective. Services are usually operated at fixed times, fixed locations, and fixed routes, which cannot satisfy the needs of citizens who have trouble getting around in rural areas. The Project's reports have created a communication channel for departments of the MOTC (such as: Directorate General of Highways, Science and Technology Advisors Office, etc.) to lower the communication cost of policy implementation, while creating the opportunity to focus on rural transportation and social inclusion issues and create a sense of urgency to resolve issues.
- Motor Vehicles Office: The Project's reports push us and motivate us to improve related measures.
- Motor Vehicles Office: We have dedicated personnel responsible for the media, and collect media reports every day for related departments to reference and respond. We immediately take action in response to reports. The reports brings everyone's attention to an issue that has been overlooked.
- Motor Vehicles Office: Township offices used to lack interest in policy of Happiness Bus, but the number of inquiries from those township offices significantly increased after seeing the reports and its subsequent impact.

¹³ Please refer to Appendix 1, Reference 10-11

	<ul style="list-style-type: none"> Excerpt from Transportation Painter¹⁴: The Directorate General of Highways implemented the Demand Responsive Transit System (DRTS) in 2016, which combines assistance resources to meet citizens' needs for public transportation services to cover the last mile to rural area. The DRTS was implemented on a trial basis at 11 demonstration locations, which is still a relatively low number of all rural areas. After Minister Lin assumed office, he charged the Directorate General of Highways with expanding and accelerating the implementation of Happiness Bus and Happiness Taxi, another form of DRTS, and set 2019 as the first year of Happiness Bus. He also instructed the Directorate General of Highways to review the needs of each local area, and prioritized 68 rural areas around the country, actively providing guidance and assisting local governments with Happiness Bus planning, including routes, transportation tools, and business model.
<p>Outcome 2: Integrated cross-departmental resource to facilitate the relaxation of regulations for the motor carrier industry</p>	
<p>Chain of events</p>	<p>The Project subsequently launched the series follow-up reports "Examination of Transportation Justice 2.0," and organized a Flipped rural transportation workshop in July 2020. In addition to the reports, the Project also took action by seeking recommendations from academics, and combined the resources of industry, government, and academia to jointly find solutions. During the workshop, Minister Lin promised to lead cross-departmental resource integration for rural areas, and relieved restrictions on personal-use vehicles to become a legitimate local taxi in rural areas. He gave an advance notice that laws will be relaxed to allow personal-use vehicles to join commercial bus carriers. After the collective efforts of government agencies, legislators, and academics, regulations on the motor carrier industry were formally amended on November 27, 2020, and personal-use vehicles in specific rural areas could finally provide services to local residents.</p>
<p>Stakeholder feedback</p>	<ul style="list-style-type: none"> Excerpt from the Facebook page of Minister Lin¹⁵: The Project's "Examination of Transportation Justice" reports pointed out the mismatch in government resources. Government departments input resources into rural areas, but lacked integration, resulting in residents living in rural areas never being able to actually enjoy the resources. During the interview last March, I gave my word to integrate departments and relieve laws to conditionally allow unlicensed cabs to carry passengers. I am grateful to the MOTC for working together and, after only

¹⁴ Please refer to Appendix 1, Reference 5

¹⁵

[https://www.facebook.com/forpeople/photos/a.576074065783815/3892174077507114/?_cft__\[0\]=AZUI5wW2oISPTxrz0TMWcZR3QMo5E4j4vPk270Va6vAD8gdn_jUjMnpDXTxuOZtUL9_0510YX4VfOEh6FHXVNPqrYMSBiDTo_LU9iNPbe6HQLYFddqz2mwrSV-DHaH70II81Ru4UnHmehCMVJyahQOli&_tn_ =EH-R](https://www.facebook.com/forpeople/photos/a.576074065783815/3892174077507114/?_cft__[0]=AZUI5wW2oISPTxrz0TMWcZR3QMo5E4j4vPk270Va6vAD8gdn_jUjMnpDXTxuOZtUL9_0510YX4VfOEh6FHXVNPqrYMSBiDTo_LU9iNPbe6HQLYFddqz2mwrSV-DHaH70II81Ru4UnHmehCMVJyahQOli&_tn_ =EH-R)

	<p>8 months, completing law amendment at the end of last year. We relaxed regulations on the industries applied for providing rural transportation and social inclusion services, allowing "Humanity-Oriented Transportation" to be truly achieved in rural areas.</p> <ul style="list-style-type: none"> • Professor Hou Sheng-Tsung of Feng Chia University: The Project's reports caused the government to face rural transportation and social inclusion issues from a demand and human-oriented perspective. Legalizing previously unlicensed cabs in rural areas achieves the government's goal of connecting the last mile to rural area. This is the outcome of years of efforts from the Project, academics, legislators, and various sectors.
Outcome 3: Encouraged investments from the private sector	
Chain of events	After the Project's reports and workshop, Minister Lin invited private companies, such as EVA Airways and China Airlines to donate money for rural transportation and social inclusion as the condition of accepting government subsidies for COVID-19 relief, in order to combine local resources and build an integrated platform to resolve the transportation issue in rural areas.
Stakeholder feedback	Lin Chia-lung, Minister of Transportation and Communications: The government has a limited budget, but the private sector has unlimited resources, so I thought of an unconventional way to channel resources of private companies into rural areas. The companies gained a sense of achievement once they began to see results. This built a connection between urban and rural areas and resulted in more resources flowing back to rural areas.
Outcome 4: Increased workload and communication pressure	
Chain of events	After the Project's reports, implementation units such as Motor Vehicles Offices were instructed to visit the areas in the reports and negotiate bus route extensions. Minister Lin instructed the Directorate General of Highways to promote and duplicate the Happiness Bus project and model to different areas, which increased communication and coordination work between local governments, and also increased the workload and pressure of personnel at the Motor Vehicles Office from communication.
Stakeholder feedback	It resulted in displacement of routine work because the project was given priority and caused working overtime. Unlike bus route extension, the Happiness Bus was not under the jurisdiction of the Motor Vehicles Office, and required inputs from local governments, which sometimes pushed back because of the extra workload from bus issues. More effort was necessary for communication.

✓ Academics

Background:

The two academics have researched rural transportation and social inclusion or assisted the government with transportation policy formulation and implementation for a long period of time before the Project's reports. Professor Chang Shyue-Koong, former director of the Department of Science and Technology Advisors, MOTC and

former consultant of Taipei City Government, has assisted the MOTC with formulating and planning policies for years, such as DRTS related projects¹⁶ and smart transportation system development projects¹⁷. For years Professor Hou Sheng-Tsung of Feng Chia University has carried out projects of the MOST, National Science Council, and MOE for promoting rural transportation and social inclusion service systems, such as establishing the social enterprise Donkey Move¹⁸ and working with Taichung City Government and Yilan County Government in providing pick-up and drop-off matching services for the underprivileged, elderly, and persons with disabilities.

Outcome 1: Gained a greater sense of achievement as research results were verified

Chain of events	After the Project's reports and workshop, academics had more opportunities to discuss and validate their academic theories with the government, media, and public, which increased exposure of their research results and gave them a greater sense of achievement.
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Stakeholder feedback	Professor Hou Sheng-Tsung of Feng Chia University: In the past, Donkey Move was only available in New Taipei City and Taichung City. After the Project's reports, I was contacted by other local government, such as Kaohsiung, Pingtung, and Taipei. I believe that the Project has obtained good outcomes working with academics: The media helped increase the influence of the empirical foundation provided by academics, which further influenced the government, and finally impacted resource users. Academics can think of their role as more than being purely academic and can expect to create even better results via cooperation between universities implementing USR and the media. After the Project's reports, even though the number of government projects received did not increase, the frequency of researching and discussing rural transportation and social inclusion issues with the media and government increased significantly.
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✓ Audience

Background: Audience members had a hard time gaining an in-depth understanding of rural transportation and social inclusion issues before the reports, so they were not particularly concerned about this issue.
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Outcome 1: Drew attention to and reflection on the issue of rural transportation and social inclusion

¹⁶ Please refer to Appendix 1, Reference 6
¹⁷ Please refer to Appendix 1, Reference 7
¹⁸ <https://www.donkeymove.com/>

Chain of events	The Project's reports allowed audience members to be aware of the dilemma of rural transportation, and increased their understanding of rural transportation and social inclusion issues. After follow-up reports and the workshop, the audience raised greater urgency to resolve the issue and greater pressure to make policy adjustments. It caused even more audience members to become concerned about and reflect on the rural transportation and social inclusion issues. Some audience members would browse related news, like and share related posts; while some were even willing to participate in related workshops. Besides, or some of the audiences said that they are willing to make donations to help improve rural transportation or had already made donations on the "Vision Project - Act now" ¹⁹ donation project collaborated with United Way of Taiwan. Through making donations, the audiences made valuable contribution on improving rural transportation and social inclusion.
Stakeholder feedback	I felt the Project's reports were easy to understand, and the video allowed me to understand the difficulty of rural transportation, as well as the considerable amount of time, manpower, and resources that are required. I wanted to help if I had the ability to, so I chose to make regular donations, which was one donation way from the "Vision Project - Act now" donation project on the official site of the United Way of Taiwan's, and continue to follow the reports to verify if my money was actually used to improve rural transportation and social inclusion.

2. Local impact

- ✓ Regular service users

<u>Background:</u>	
<p>The project focuses on disclosing the transportation dilemma faced by residents of rural areas that have severely insufficient resources, draws the attention of government and non-governmental organizations to related issues, channels resources to improve local transportation, and hopes to duplicate the experience to improve the convenience of rural transportation throughout the country.</p> <p>Pingtung Xuhai Village and Chiayi Zhouzi Village are the starting point of the Project's reports on transportation justice. Before the Project's reports, public transportation was extremely inconvenient for the two villages, there were very few buses each day, and residents needed to get up very early or walk a long way in order to take the bus to a hospital or market. Hence, when elderly residents needed to go out, they had to wait until family members were free, ask people in their community, or spend a significant amount of money on a taxi or even illegal motor carrier, which was extremely inconvenient.</p>	
Outcome 1: Enhanced quality of life	
Chain of events	The Project discovered the dilemma of rural transportation in these two villages, and conducted in-depth interviews and follow-up,

¹⁹ <https://www.unitedway.org.tw/Donate.aspx?SNo=33&rid=783565D6-8CDF-4A61-BD32-864E8D22D2BC&fw>

	extensively reporting on the villages under the theme "Examination of Transportation Justice." The reports allowed governments and citizens in urban areas to understand the needs of rural residents. Hence, local Motor Vehicles Offices and township offices visited the two villages under the guidance of the MOTC, asked local residents about their needs, and discussed possible solutions. They then efficiently established two new Happiness Bus routes for residents to ride the bus free of charge. The two routes have new, comfortable, and more frequent buses. Bus drivers are young and flexible in pick-up and drop-off time, making it significantly more convenient for residents to go out. As a result, residents often took the buses downtown to the hospital, market, or for fun occasionally, which improved their quality of life.
Stakeholder feedback	Going out of the village was very inconvenient in the past. My main purpose of going out was to the hospital, but had to wait until a family member was free. There were too few buses and the chassis were too high, which was not suitable for elderly people. I never thought it was possible to try to obtain additional transportation resources so that I am grateful to the Project for interviewing us and reporting on our village. The government came to ask us about our transportation needs after the reports, and we had the new Happiness Bus route in only a few months. Now there are more ways to leave the village, and the drivers are more flexible, sometimes even waiting for us or taking different routes so that we can see the scenery. This made everyone more willing to go outdoors.

✓ High risk service users

<u>Background:</u>	
It is hard to get a taxi in Xuhai Village, and there is only one elderly driver over the age of 80 that helps transport people between Xuhai Village and the downtown area. Even though the driver knows he is old and not as healthy as what he used to be, he feels duty-bound whenever a resident needs to go out. It is risky taking his personal-use vehicle on mountain roads for more than two hours round trip between Xuhai Village and the downtown area. Still, a considerable ratio of residents are willing to take the risk due to the insufficient local transportation resources. We define residents who have no choice but to frequently use the elderly driver's motor carrier services as high risk users.	
Outcome 1: Enhanced quality of life (The process of this outcome is the same for regular users and high risk users)	
Chain of events	Same as outcome 1 of regular users, and there was determined to be no material differences after conducting interviews.
Stakeholder feedback	
Outcome 2: Elevated transportation safety	
Chain of events	The Project conducted in-depth interviews and follow-up when it discovered the elderly driver transporting passengers in Xuhai Village. The main means of transportation from Xuhai Village to other places is an elderly driver above the age of 80 driving a

	<p>personal-use vehicle, and residents have no choice but to take high risk to go to the hospital or market downtown. This unique situation caused the central government to accelerate its review and adjustment of its rural transportation and social inclusion, and it instructed local Motor Vehicles Offices and township offices to conduct an field survey and handle detailed implementation. The government thus established a whole new Happiness Bus route to Xuhai Village within a short amount of time. Moreover, the buses are in good condition and drivers are younger and stable. This gives residents a new and safe option for traveling downtown.</p>
Stakeholder feedback	<p>Even though taking the elderly driver's car was convenient, we were worried because he is already very old. We not only worried about ourselves, our family also worried about our safety . It happens that some people who took his car and were left behind downtown and had to call the elderly driver to come back and pick them up. Now that we have Happiness Bus, our family members are not so worried when we go out, and we also feel safer going out and more often take the bus to other places.</p>

✓ Local organization

<u>Background:</u>	
<p>Pingtung Xuhai Village is a village with severe outflow of the young population, and has a high ratio of elderly people and children. The local organization Xuhai Classroom Service Station for the Elderly and Children provide local elderly people and persons with disabilities with daycare, and provide children with after-school programs. The local organization also frequently needs to pick-up and drop-off elderly people. When elderly people in the village need to go to the hospital downtown, personnel of the local organization will take turns transporting them. However, due to the local organization's limited manpower, this carrying job generate serious workload for the organization.. The local organization will sometimes ask the elderly driver to help transport elderly people downtown due to insufficient manpower, but they were always worried about the safety of the elderly people, and could only feel at ease till the elderly people safely got home.</p>	
Outcome 1: Reduced the manpower burden on organization from pick-up and drop-off and relieved psychological pressure	
Chain of events	<p>The Project discovered the elderly driver transporting passengers in Xuhai Village and conducted in-depth interviews and follow-up, which caused the government to establish the new Happiness Bus route to Xuhai Village, and provided a safe and comfortable transportation option to residents. After the Happiness Bus Xuhai route began operations, elderly people at Xuhai Classroom Service Station for the Elderly and Children had a new option for transportation, effectively sharing the local organization's burden of taking elderly people to downtown. Moreover, the buses are in good condition and drivers are stable, which allow the person in charge of the local organization to feel significantly relieved to the transportation safety of elderly people.</p>

Stakeholder feedback	Life has become a lot more convenient with Happiness Bus. Social welfare workers do not need to make as many trips picking people up as before, and can even arrange for a large group of people to go out together led by only one volunteer. This saves a lot of effort and has made it much easier for us. When elderly people took the elderly driver's car in the past, we often worried about their safety as well as the elderly driver's physical condition, but now Happiness Bus has a young driver and greater flexibility, so I do not need to worry as much.
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✓ Bus operator

<u>Background:</u>	
Before the Project's reports, the village's only bus stop was located on the main road 1.1 km away. The bus stop does not have any lights, shelter, and sidewalk. For an area mostly populated by elderly people age 65 and above, it takes at least half an hour to get to the bus stop at their pace, but this is at most a 1-2 minute drive for buses to go into the village, which will provide more convenient access for users with public transportation needs and maximize the benefits of public transportation.	
Outcome 1: Improved the bus operator's brand image	
Chain of events	The Project discovered that residents of the village had trouble getting in and out, reported the situation, and tracked developments. Local authorities and bus operator quickly discovered and looked into the needs and dilemma of the village after the news reports, and extended the bus route (into the village) after evaluation, allowing residents to more conveniently access public transportation. The Project continued to follow up on the impact and benefit of this change and reported it through media, which allowed more people to understand the bus operator's route adjustment, as well as received positive feedback from bus passengers. This increased the bus operator's public exposure and improved its brand image.
Stakeholder feedback	After the news reports, the authorities came to us to discuss the possibility of route extension after learning about the transportation needs of elderly people in the village. Even though we realized that there were not many passengers in the village, but were still willing to give it a try. We understand the transportation needs of residents, so we keep maintaining the route for years as part of fulfilling our corporate social responsibility. We gained considerable media exposure on the day the bus route extended into the village, and received feedback from the village head and passengers gave us the feeling that our image had significantly improved.

II. Outcome indicators/Materiality

Based on the SROI standards, we needed to establish one or more indicators for each outcome to prove that the outcome indeed occurred, verify the number and extent of outcomes that occurred, and whether the outcome was material or important to stakeholders. After literature review²⁰ and discussions with different stakeholders in the "understand/verify outcomes" phase of engagement, we set indicators suitable for the characteristics of different stakeholder groups and verified that the outcomes did occur and were important to the stakeholder. Our questionnaire items were designed with three levels to determine if an outcome occurred, the degree of change, and materiality. An outcome was included in the final calculation when it met all conditions.

1. Did the outcome occur: In other words, we tried to prove that the outcome did occur and confirmed its degree of occurrence. We summarized facts that an outcome occurred in stakeholders based on interviews in the first phase, and designed questionnaire items that respondents were allowed to give multiple answers for. Stakeholders responded based on their actual situation, and we determined that an outcome occurred when one or more facts of changes occurred.
 - a. Recognition: Refers to changes in recognition of the outcome.
 - b. Attitude: Refers to changes in attitude towards the outcome.
 - c. Behavior: Refers to an impact on not only recognition and attitude, but further led to changes in behavior.
2. Degree of change: We asked stakeholders whether or not an outcome occurred, or if they sensed any changes of the outcome, and designed items that measure the degree of change on a five point scale. We used was at least 50% agreed the outcome has occurred, i.e., if over 50% of a stakeholder group responded that they had the outcome's average degree of change, we determined that the outcome had a material impact in the group. If less than 50% responded that they had the outcome's average degree of change, then the outcome was determined to not have a material impact on the group.
3. Materiality: In the questionnaire, we asked stakeholders about the importance of the outcome to them. If the average level of importance to the stakeholders reached 5 points and above (10 points in total), then the outcome was deemed material to the stakeholder group.

[Threshold for determining if an outcome occurred] An outcome was deemed to have occurred if it meets all of the following three conditions:

1. [Subjective] Outcome occurred: Selected at least one of the facts proving the outcome occurred
2. [Objective] Degree of change: Responded that the degree of change for an outcome was "Some change" and above
3. [Subjective] Materiality: Importance of the outcome to the stakeholder reached 5 points and above

²⁰ Please refer to references in Appendix 1

In the case of audience's "drew attention to and reflection on the issue of rural transportation and social inclusion ":

Level	Topics	Contents																
Subjective	Outcome Indicators	After seeing the report on " Rural Transportation and social inclusion, Vision Project, United Daily News Group," did it change or impact your personal recognition, opinions, or attitude in any of the following ways?																
		<table border="1"> <thead> <tr> <th>Aspect</th> <th>Facts</th> </tr> </thead> <tbody> <tr> <td>Recognition</td> <td><input type="checkbox"/> Improved my understanding of rural transportation and social inclusion issues</td> </tr> <tr> <td>Attitude</td> <td><input type="checkbox"/> I will browse through information related to rural transportation and social inclusion more often, like and share posts on rural transportation and social inclusion, or write related posts or blogs.</td> </tr> <tr> <td>Attitude</td> <td><input type="checkbox"/> I am willing to participate in rural transportation and social inclusion related workshops, initiatives, or volunteer activities.</td> </tr> <tr> <td>Attitude</td> <td><input type="checkbox"/> I am willing to make a donation to improve rural transportation and social inclusion.</td> </tr> <tr> <td>Behavior</td> <td><input type="checkbox"/> I have already made a donation to improve rural transportation and social inclusion.</td> </tr> <tr> <td></td> <td><input type="checkbox"/> Other (please specify): _____</td> </tr> <tr> <td></td> <td><input type="checkbox"/> None of the situations above occurred</td> </tr> </tbody> </table>	Aspect	Facts	Recognition	<input type="checkbox"/> Improved my understanding of rural transportation and social inclusion issues	Attitude	<input type="checkbox"/> I will browse through information related to rural transportation and social inclusion more often, like and share posts on rural transportation and social inclusion, or write related posts or blogs.	Attitude	<input type="checkbox"/> I am willing to participate in rural transportation and social inclusion related workshops, initiatives, or volunteer activities.	Attitude	<input type="checkbox"/> I am willing to make a donation to improve rural transportation and social inclusion.	Behavior	<input type="checkbox"/> I have already made a donation to improve rural transportation and social inclusion.		<input type="checkbox"/> Other (please specify): _____		<input type="checkbox"/> None of the situations above occurred
		Aspect	Facts															
		Recognition	<input type="checkbox"/> Improved my understanding of rural transportation and social inclusion issues															
		Attitude	<input type="checkbox"/> I will browse through information related to rural transportation and social inclusion more often, like and share posts on rural transportation and social inclusion, or write related posts or blogs.															
		Attitude	<input type="checkbox"/> I am willing to participate in rural transportation and social inclusion related workshops, initiatives, or volunteer activities.															
		Attitude	<input type="checkbox"/> I am willing to make a donation to improve rural transportation and social inclusion.															
		Behavior	<input type="checkbox"/> I have already made a donation to improve rural transportation and social inclusion.															
	<input type="checkbox"/> Other (please specify): _____																	
	<input type="checkbox"/> None of the situations above occurred																	
Objective	Degree of change	After seeing the report on " Rural Transportation and social inclusion, Vision Project, United Daily News Group,," how much did it change the amount of attention you paid to or reflected on rural transportation and social inclusion issues?																
		<input type="checkbox"/> Changed greatly (100%) <input type="checkbox"/> Changed a lot (75%) <input type="checkbox"/> Changed some (50%) <input type="checkbox"/> Changed a little (25%) <input type="checkbox"/> No change (0%) <input type="checkbox"/> Other, please specify: _____																
Subjective	Materiality	With regard to the changes in amount of attention you paid to or reflected on rural transportation and social inclusion issues after seeing the reports of " Rural Transportation and social inclusion, Vision Project, United Daily News Group," how important were the changes to you?																

		(0-10 points, 0 points represents not important at all, 10 points represents very important)
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Finally, we engaged stakeholders again in the validation phase and discussed questionnaire results with them. We verified that the outcome was indeed relevant or material to them before including it in the final calculation based on the principle of materiality. Outcome analysis is summarized below::

1. Policy implementation

✓ Local organization

Name of outcome	Description	Included/Excluded
Relieved financial burden	<ol style="list-style-type: none"> 1. Outcome indicators: Data from the questionnaire survey show: <ul style="list-style-type: none"> - 100% of stakeholders responded that they obtained additional steady sources of donations from the private sector. - 100% of stakeholders responded that they received more resources or invitations to events organized by the government. 2. Degree of change: The local organization responded that there was a 50% change in the outcome. 3. Materiality: The local organization responded that the importance of the outcome was 5 points. <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on the local organization.</p>	Included

✓ Government

Name of outcome	Description	Included/Excluded
Expanded and accelerated the implementation of current policy	<ol style="list-style-type: none"> 1. Outcome indicators: Data from the questionnaire survey show: <ul style="list-style-type: none"> - 100% of stakeholders responded that they became more concerned 	Included

	<p>about rural transportation and social inclusion issues, and responded by make adjustments to project budgets or policy implementation.</p> <ul style="list-style-type: none"> - 50% of stakeholders responded that their improvements caused more townships to actively inquire about application and implementation of Happiness Bus. <p>2. Degree of change: The government on average responded that there was a 88% change in the outcome.</p> <p>3. Materiality: The government on average responded that the importance of the outcome was 9.5 points.</p> <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on the government.</p>	
<p>Integrated cross-departmental resource, and facilitated the relaxation of regulations for the motor carrier industry</p>	<p>1. Outcome indicators: Data from the questionnaire survey show: 100% of stakeholders responded that they became more concerned about rural transportation and social inclusion issues, and responded by making adjustments to project budgets or policy implementation. 100% of stakeholders responded that their improvements caused even more townships to actively inquire about application and implementation of personal-use vehicles in rural areas.</p> <p>2. Degree of change: The government on average responded that there was a 88% change in the outcome.</p> <p>3. Materiality: The government on average responded that the</p>	<p>Included</p>

	<p>importance of the outcome was 9 points.</p> <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on the government.</p>	
Encouraged investments from the private sector	<ol style="list-style-type: none"> 1. Outcome indicators: Data from the questionnaire survey show: <ul style="list-style-type: none"> - 50% of stakeholders responded that their improvements caused even more private organizations and schools to inquire about how to input or access related resources. 2. Degree of change: The government on average responded that there was a 88% change in the outcome. 3. Materiality: The government on average responded that the importance of the outcome was 9 points. <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on the government.</p>	Included
Increased workload and communication pressure	<ol style="list-style-type: none"> 1. Outcome indicators: Data from the questionnaire survey show: <ul style="list-style-type: none"> - 50% of stakeholders responded that they felt stress from work or communication with other units (competent authority, local government, bus operator, and local residents). - 100% of stakeholders responded that rural transportation and social inclusion related affairs increase their workload, and they needed to work overtime to complete the work. 2. Degree of change: The government on average 	Included

	<p>responded that there was a 100% change in the outcome.</p> <p>3. Materiality: The government on average responded that the importance of the outcome was 10 points.</p> <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on the government.</p>	
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✓ **Academics**

Name of outcome	Description	Included/Excluded
Gained a greater sense of achievement as research results were verified	<p>1. Outcome indicators: Data from the questionnaire survey show:</p> <ul style="list-style-type: none"> - 100% of stakeholders responded that they were more frequently invited to rural transportation and social inclusion related seminars, lectures, or to serve as consultants to the government for policy formulation. <p>2. Degree of change: Academics on average responded that there was a 63% change in the outcome.</p> <p>3. Materiality: Academics on average responded that the importance of the outcome was 8.5 points.</p> <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on academics.</p>	Included

✓ **Audience**

Name of outcome	Description	Included/Excluded
Drew attention to and reflection on the issue of rural transportation and social inclusion	<p>1. Outcome indicators: Data from the questionnaire survey show:</p> <ul style="list-style-type: none"> - 88% of stakeholders responded that it improved their understanding of rural 	Included

	<p>transportation and social inclusion issues.</p> <ul style="list-style-type: none"> - 52% of stakeholders responded that they will browse through information related to rural transportation and social inclusion more often, like and share posts on rural transportation and social inclusion, or write related posts or blogs. <p>2. Degree of change: The audience on average responded that there was a 61% change in the outcome.</p> <p>3. Materiality: The audience on average responded that the importance of the outcome was 7.6 points.</p> <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on the audience.</p>	
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2. Local impact

✓ General service user

Name of outcome	Description	Included/Excluded
Enhanced quality of life	<p>1. Outcome indicators: Data from the questionnaire survey show:</p> <ul style="list-style-type: none"> - 66% of stakeholders felt it has become more convenient to take the bus to go out. - 68% of stakeholders are more willing and frequently take the bus to go out. <p>2. Degree of change: Regular service users on average responded that there was a 50% change in the outcome.</p> <p>3. Materiality: Regular service users on average responded that</p>	Included

	<p>the importance of the outcome was 8 points.</p> <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on regular service users.</p>	
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✓ **High risk service users**

Name of outcome	Description	Included/Excluded
Enhanced quality of life	<ol style="list-style-type: none"> 1. Outcome indicators: Data from the questionnaire survey show: <ul style="list-style-type: none"> - 66% of stakeholders felt it has become more convenient to take the bus to go out. - 68% of stakeholders are more willing and frequently take the bus to go out. 2. Degree of change: High risk service users on average responded that there was a 50% change in the outcome. 3. Materiality: High risk service users on average responded that the importance of the outcome was 8 points. <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on high risk service users.</p>	Included
Elevated transportation safety	<ol style="list-style-type: none"> 1. Outcome indicators: Data from the questionnaire survey show: <ul style="list-style-type: none"> - 66% of stakeholders felt it has become safer to take the bus to go out. - 87% of stakeholders are more willing and frequently take the bus to go out. 2. Degree of change: High risk service users on average responded that there was a 50% change in the outcome. 3. Materiality: High risk service users on average responded that 	Included

	<p>the importance of the outcome was 8 points.</p> <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on high risk service users.</p>	
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✓ **Local organization**

Name of outcome	Description	Included/Excluded
Reduced the manpower burden on organization from pick-up and drop-off and relieved psychological pressure	<ol style="list-style-type: none"> 1. Outcome indicators: Data from the questionnaire survey show: <ul style="list-style-type: none"> - 100% of stakeholders responded that they felt more at ease letting elderly people take the bus to go out. - 100% of stakeholders responded that the organization did not need as many people to pick up, drop off, and take care of elderly people. 2. Degree of change: The local organization responded that there was a 50% change in the outcome. 3. Materiality: The local organization on average responded that the importance of the outcome was 8 points. <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on the local organization.</p>	Included

✓ **Bus operator**

Name of outcome	Description	Included/Excluded
Improved the bus operator's brand image	<ol style="list-style-type: none"> 1. Outcome indicators: Data from the questionnaire survey show: <ul style="list-style-type: none"> - 100% of stakeholders responded that more people recognized them due to the bus route extension. 	Included

	<ul style="list-style-type: none"> - 100% of stakeholders responded that interviews and reports by other media after the bus route extension increased their exposure. - 100% of stakeholders responded that they felt recognition from the public in the bus route extension process. <ol style="list-style-type: none"> 2. Degree of change: The local organization responded that there was a 50% change in the outcome. 3. Materiality: The local organization on average responded that the importance of the outcome was 7 points. <p>Summarizing feedback in the three aspects above, we determined that the outcome had a material impact on the bus operator.</p>	
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III. Duration of outcomes

The Project duration was from May 2018 to December 2020.

Every outcome has a different duration. For Audience, Bus operators and Academics, we calculated the average duration of their outcomes based on their subjective feedback. We also referenced the project scope and related literature and reconfirmed the significantly different items with stakeholders. On the other hand, for Government, Service users and Local organization, we calculated the duration of their outcomes based on the actual period of the outcomes since they are highly related to government’s input which varied every year and would be hard to estimated for the coming year. Therefore, under the “Do Not Over-claim” principle, we use the actual duration of how long these outcomes lasted till the end of the Project period.

There are a few key time points, specifically the Project's Transportation Justice 1.0 reports that started at the end of May 2018; the government began to actively respond and formulated related transportation policies in June 2018, which is when private organizations and individuals began to make donations to the local organization in Xuhai Village; the transportation routes of existing policies were extended beginning in 2018; the Project's Transportation Justice 2.0 reports that started in June 2020, and the government introduced a new Happiness Bus route at the end of this month; the Project organized the Flipped rural transportation workshop in July 2020, and the

government led even more inputs from private sector resources; the government relieved regulations on motor carrier industry in rural areas in December 2020, and integrated resources across government departments. The time points above correspond to different outcome durations, which are summarized below:

1. Policy implementation

Stakeholder		Description of outcome	Duration (Unit: Year)
Name	Subgroup		
Local organization	None	Relieved financial burden	2.58
Government	None	Expanded and accelerated the implementation of current policy	2.42
		Integrated cross-departmental resource, and facilitated the relaxation of regulations for the motor carrier industry	0.08
		Encouraged investments from the private sector	0.5
		Increased workload and communication pressure	2.58
Audience	None	Drew attention to and reflection on the issue of rural transportation and social inclusion	2.04

2. Local impact

Stakeholder		Description of outcome	Duration (Unit: Year)
Name	Subgroup		
Service user	Regular users	Enhanced quality of life	0.5
	High risk users	1. Enhanced quality of life 2. Elevated transportation safety	0.5
Local organization	None	Reduced the manpower burden on organization from pick-up and drop-off and relieved psychological pressure	0.5
Bus operator	None	Improved the bus operator's brand image	2

IV. Financial proxies

We converted the changes experienced by various stakeholders into reasonable monetary value via financial proxies. The steps and methods for determining financial proxies in this study are as follows:

Step 1: Determine the valuation method

Based on feedback from the stakeholder engagement process, we summarized the outcome value conversion method for each type of stakeholder. Furthermore, we also referenced relevant literature²¹, such as government budget reports and research reports on transportation issues published by other domestic academic institutions. We then screened outcomes that are suitable for each stakeholder group, or an outcome valuation method that stakeholders can understand. Please see Appendix 4 for details on financial proxies for outcomes of various stakeholders.

1. Policy implementation

Stakeholder		Outcome	Valuation method	Financial proxies	Reason for selection
Name	Subgroup				
Local organization		Relieved financial burden	Cost-based Method	Average market value of resources donated each year	After interviewing the person in charge of the local organization, we found that the organization can clearly list the average market value of supplies donated each month. Hence, the cost-based method was used.
Government		Expanded and accelerated the implementation of current policy	Cost-based Method	Actual amount of subsidies from transportation policies of Chiayi County and Pingtung County from 2018 to 2020	We were able to find the budget for the "County/City Government Public Transportation Subsidy Project of the Directorate General of Highways" and reconfirmed the figure by interviewing case officers at Chiayi Motor Vehicles Office. Hence, the cost-based method was used.

²¹ Please refer to references in Appendix 1

Stakeholder		Outcome	Valuation method	Financial proxies	Reason for selection
Name	Subgroup				
		Integrated Cross-departmental resource, and facilitated the relaxation of regulations for the motor carrier industry	Cost-based Method	The amount of fines drivers are able to avoid after legalizing the use of personal-use vehicles to carry customers in rural areas, plus the amount of government subsidies	<ol style="list-style-type: none"> 1. The new law allows personal-use vehicles to legally carry customers after permission. Hence, we plan to use the amount of fines avoided as the basis for using the cost-based method 2. The Pingtung Happiness Bus 2.0 Integrated Service Demonstration clearly lists the amount of subsidies for the project in this area. Hence, the cost-based method is used.
		Encouraged investments from the private sector	Cost-based Method	Actual amount of resources provided by the private sector	We obtained the amount of donations from the private sector through interviews with case officers at Kaohsiung Motor Vehicles Office, and were able to obtain the estimated amount of donations from private organizations. Hence, the cost-based method was used.

Stakeholder		Outcome	Valuation method	Financial proxies	Reason for selection
Name	Subgroup				
		Increased workload and communication pressure	Cost-based Method	Overtime pay for civil servants	After interviewing case officers at the Motor Vehicles Office, we were able to obtain the actual number of hours they worked overtime, and could use public information on the average salary of civil servants for calculation. Hence, the cost-based method was used.
Academics		Gained a greater sense of achievement as research results were verified	Revealed Preference Method	Weighted average of value of outcomes able to achieve the same sense of achievement	Since sense of achievement is hard to directly calculate, we used several different values as an alternative for stakeholders to choose from, and then calculated the weighted average of responses from academics.
Audience		Drew attention to and reflection on the issue of rural transportation and social inclusion	Revealed Preference Method	Average amount willing to donate each year to help improve rural transportation and social inclusion	We referred to an assured report ²² . According to the assured report, the financial proxies of the "outcome" "Increase awareness of social care" is "Average amount of donations". Besides, according to the interview, the audience stakeholder also agreed that the value of "Donation willing to make to help

²² Please refer to Appendix 1, Reference 16

Stakeholder		Outcome	Valuation method	Financial proxies	Reason for selection
Name	Subgroup				
					<p>improve rural transportation project²³ " could be applied to value the outcome of "Drew attention to and reflection on the issue of rural transportation and social inclusion". Therefore, we designed the donation options in the questionnaire by referring to the donation type specified in the "Vision Project - Act now" donation project collaborated with United Way of Taiwan. We then collected all questionnaires and validated calculation result of the amount of donation, using the weighted - average cost method for the financial proxy of the outcome. Hence the Revealed Preference method was used. Meanwhile, the actual amounts of donations from the audiences were included in the sensitivity analysis²⁴.</p>

²³ Same as Note 19

²⁴ Please see "Chapter 4 Section 2 Sensitivity Analysis " for details about "Financial proxies for outcomes".

2. Local impact

Stakeholder		Outcome	Valuation method	Financial proxies	Reason for selection
Name	Subgroup				
Service user	Regular users	Enhanced quality of life	Cost-based Method	Transportation expenses saved by taking Happiness Bus	We found many financial proxies for better quality of life, in which the amount of transportation expenses saved was the most realistic for residents of rural areas, and gave them the best understanding of the connection with the outcome. Hence, we used transportation expenses to convert the value of better quality of life.
		Enhanced quality of life	Same as above	Same as above	Same as above
	High risk users	Elevated transportation safety	Cost-based Method	Average compensation amount per accident	Residents who take the elderly driver's personal-use vehicle are at high risk, but we could not obtain actual risk values, so we make the following assumption: We assumed that taking the elderly driver's personal-use vehicle will result in one accident each year. Many costs will be incurred if there is a car accident, including medical loss, support expenses, extra living expenses, labor loss, mental loss, etc. To estimate above amount, we refer to

Stakeholder		Outcome	Valuation method	Financial proxies	Reason for selection
Name	Subgroup				
					actual court judgment data and insurance claims data in Taiwan. After communicating and discussing with the main caregivers and high-risk service users, they believed that the amount of court judgments, which is society cost, reflected the value of this outcome more objectively. Meanwhile, we used the insurance claims as the financial proxy in sensitivity analysis ²⁵ .
Local organization		Reduced the manpower burden on organization from pick-up and drop-off and relieved psychological pressure	Cost-based Method	Reduced labor costs for fewer number of trips	After interviewing the person in charge of the local organization, we found that the organization can clearly determine the difference in number of trips and personnel required. Hence, the cost-based method was used.
Bus operator		The bus operator's image improved	Revealed Preference Method	Average newspaper advertisement rate of the United Daily New Group for one year	Since the Project can clearly provide the number of ads placed by the bus operator and the general newspaper advertisement rate.

²⁵ Please see "Chapter 4 Section 2 Sensitivity Analysis " for details about “Financial proxies for outcomes”.

Stakeholder		Outcome	Valuation method	Financial proxies	Reason for selection
Name	Subgroup				
					Hence, the Revealed Preference method was used.

Step 2: Calculation method

After summarizing the valuation method, we put all options into the questionnaire and discussed the appropriateness of the valuation method with stakeholders, asking them about related values, such as the amount of time input or amount donated. After collecting questionnaires from stakeholders, we compiled statistics on the monetary value of different outcomes among stakeholders, and then calculated the average. In addition, we also asked each stakeholder in the questionnaire and interview to give a score for each outcome based on its importance, in order to validate whether the selected financial proxies really reflected the importance of each outcome in their minds. If there were any inconsistencies, interviews were held to determine the reasons and amend the conclusion.

Step 3: Outcome validation:

We validated the final calculation result through stakeholder interviews in the outcome validation phase, and adjusted and looked into all relatively uncertain factors in the process during the sensitivity analysis.

V. Adjusting factors

To comply with the SROI principle of "do not over-claim," we eliminated impacts that were not caused by the Project, and considered the four adjusting factors in different phases. We mainly used quintile in the questionnaire survey for stakeholders to assess individual outcomes, using weighted average to calculate the percentage. We then verified outcomes that had significant differences with stakeholders, as described below:

1. Deadweight:

Refers to the percentage of the outcome that will still occur, regardless of implementation or participation in the Project.

The deadweight of most outcomes in this evaluation was 20%-40%. Users responded that there was still a slight possibility that the changes and impacts would still occur without the Project's reports, because they could still ask the local organization or family members to help them with transportation. The local organization believes that it is impossible to obtain the outcome "Relieved financial burden" without the Project's reports. The government responded that policies will continue to be implemented, but the efficiency and actual contents of the policies might not be able to provide such benefits and

impacts without the Project's reports or follow-up. Furthermore, we asked academics who are promoting rural transportation and social inclusion about the implementation and formulation process of policies, and also referenced relevant literature. We therefore calculated the average response from both government and academics to determine the deadweight of those policy-related outcomes from government's perspective. However, the deadweight of the outcome "Gained a greater sense of achievement as research results were verified" was 100% because academics responded that it will still occur regardless of the Project.

2. Attribution:

This refers to the proportion of outcomes brought about by this project that were the result of contributions from other factors, i.e., the percentage of the outcome that the Project cannot claim credit for. Unlike deadweight, attribution takes into account intervention from other projects, while deadweight is the probability that the outcome would naturally occur.

Based on the interviews and questionnaire survey, most stakeholders responded that other factors more or less contributed to the outcomes. Hence, attribution is approximately 25%-50%. However, from the feedback from government and academics, we found that aside from the professional opinions contributed by academics for those policy-related outcomes, the attitude and philosophy of the decision-maker is the main driving force. Hence, the attribution of government outcomes is approximately 60%-75%.

3. Displacement:

This represents the effects of the Project on other stakeholders, both inside and outside of the Project. In other words, the percentage of the Project's outcome that displaces the problem elsewhere or to other people.

The outcome "Expanded and accelerated the implementation of current policy" has a certain percentage of displacement. In the engagement process with the government, we learned that accelerated execution of existing policies will affect the budget planning and allocation of other policies. Hence, after verification with stakeholders, we used a displacement of 10% for calculation, reflecting on the actual situation. Other stakeholder outcomes did not have this factor and was calculated at 0%.

Even though we found that most outcomes did not involve displacement, we still included the factor in the sensitivity analysis.

4. Drop-off:

This refers to the rate at which the effects of the outcome diminish over time; in short, it is the rate at which benefits of the outcome decrease year by year.

According to *A Guide to Social Return on Investment*, drop-off only needs to be considered when calculating the value of outcomes in the second year if the

outcome's duration is longer than one year. Since the value of most outcomes from government's perspective is calculated based on the actual amount of subsidies for each year instead of estimating fixed amount over multiple years, drop-off is not applicable. When calculating the outcomes of bus operators, the bus operators responded that there was no drop-off as the reports were distributed over two years. Academics also responded that there was no drop-off in their outcomes, so drop-off was also calculated at 0%. For remaining outcomes with a duration longer than one year, we calculated the weighted average of responses in the questionnaire for stakeholders.

Stakeholder		Description of outcome	Deadweight	Displacement	Attribution	Drop-off ²⁶
Name	Subgroup					
Service user	General residents	Enhanced quality of life	25%	0%	25%	NA
	High risk residents	Enhanced quality of life	25%	0%	25%	NA
		Elevated transportation safety	25%	0%	50%	NA
Local organization		Reduced the manpower burden on organization from pick-up and drop-off and relieved psychological pressure	25%	0%	50%	NA
		Relieved financial burden	0%	0%	25%	25%
Bus operator		Improved the bus operator's brand image	50%	0%	25%	0%
Government		Expanded and accelerated the implementation of current policy	26%	10%	74%	NA
		Integrated Cross-departmental resource, and facilitated the relaxation of regulations for	35%	0%	65%	NA

²⁶ Drop-off does not need to be considered for outcomes with a duration shorter than one year, so we specified it as n/a.

Stakeholder		Description of outcome	Deadweight	Displacement	Attribution	Drop-off ²⁶
Name	Subgroup					
		the motor carrier industry				
		Encouraged investments from the private sector	50%	0%	70%	NA
		Increased workload and communication pressure	63%	0%	63%	40%
Academics		Gained a greater sense of achievement as research results were verified	100%	0%	63%	0%
Audience		Drew attention to and reflection on the issue of rural transportation and social inclusion	36%	0%	39%	31%

Chapter 4 SROI Calculation²⁷

Section I Present Value of Outcome Impact

We calculated the impact of outcomes determined through the stakeholder engagement process above, and the method for calculating outcome value is as follows:

$$\text{Outcome value} = \text{Number of outcomes} * \text{Outcome valuation} * (1-\text{Deadweight}) * (1-\text{Displacement}) * (1-\text{Attribution}) * (1-\text{Drop-off})^{28}$$

Stakeholder		Outcome	Percentage of changes ²⁹	Number of outcomes ³⁰	Duration ³¹	Value in currency (NT\$)	Value of Outcome					
Name	Population/ Number of units						Discount rate (%)			1.04% ³²		
							Year 1 (After the event: 2018)	Year 2	Year 3	Year 4	Year 5	Total
General service user	45	Enhanced quality of life	100%	45	0.5	16,051	-	-	410,608 ³³	-	-	410,608

²⁷ Please refer to Appendix 5 for the impact map with detailed calculations.

²⁸ Outcomes are included in calculations when their duration is longer than one year

²⁹ Please see "Chapter 3 Section 3 Outcome indicators/Materiality" for the threshold for determining if an outcome occurred. The population of local organization and government is both 1, so the number of outcomes of the population was used in calculations, and there is no sample outcome ratio.

³⁰ Number of outcomes = Percentage of changes × Total population/unit

³¹ Please see "Chapter 3 Section 3 Duration of outcomes" for details.

³² The three-year fixed interest rate for deposits offered by Chunghwa Post as of June 2018

³³ Happiness Bus began operations On June 20, 2020, and users only showed impacts and changes from the outcome after operations began. Hence, the outcome's value is calculated in the third year after the Project's report in May 2018.

Stakeholder		Outcome	Percentage of changes ²⁹	Number of outcomes ³⁰	Duration ³¹	Value in currency (NT\$)	Value of Outcome					
Name	Population/ Number of units						Discount rate (%)			1.04% ³²		
							Year 1 (After the event: 2018)	Year 2	Year 3	Year 4	Year 5	Total
High risk service users	18	Enhanced quality of life	100%	18	0.5	16,051	-	-	162,513 ³⁴	-	-	162,513
		Elevated transportation safety	72% ³⁵	13	0.5	2,879,386	-	-	14,037,004 ³⁶	-	-	14,037,004
Local organization	1	Reduced the manpower burden on organization from pick-up and drop-off and relieved psychological pressure	NA	1	0.5	132,000	-	-	49,500 ³⁷	-	-	49,500
		Relieved financial burden	NA	1	2.58	660,000	288,750 ³⁸	371,250	278,438	-	-	938,438

³⁴ Same as Note 31

³⁵ 13 out of 18 users switched to Happiness Bus after it began operations, and no longer take the elderly driver's personal-use vehicle. 13/18=72%, which is the ratio of avoiding traffic risks.

³⁶ Same as Note 31

³⁷ Same as Note 31

³⁸ The outcome began to have an impact after the Vision Project's reports began (May 2018). Hence, outcome value is calculated according to the ratio in the first year.

Stakeholder		Outcome	Percentage of changes ²⁹	Number of outcomes ³⁰	Duration ³¹	Value in currency (NT\$)	Value of Outcome					
Name	Population/ Number of units						Discount rate (%)			1.04% ³²		
							Year 1 (After the event: 2018)	Year 2	Year 3	Year 4	Year 5	Total
Bus operator	1	Improved the bus operator's brand image	100%	1	2	862,000	323,250	323,250	-	-	-	646,500
Government	1	Expanded and accelerated the implementation of current policy	NA	1	2.42	59,548 ³⁹	10,375	-	-	-	-	9,180,273
						4,870,865 ⁴⁰	-	848,672	-	-	-	
						47,758,805 ⁴¹	-	-	8,321,226	-	-	
		Integrated Cross-departmental resource, and facilitated the	NA	1	0.08	7,262,980	-	-	1,652,328 ⁴²	-	-	1,652,328

³⁹ The actual amount of subsidies from government policy in 2018 was used for calculation. Hence, the outcome value is only calculated for the first year after the Project began (2018).

⁴⁰ The actual amount of subsidies from government policy in 2019 was used for calculation. Hence, the outcome value is only calculated for the second year after the Project began (2019).

⁴¹ The actual amount of subsidies from government policy in 2020 was used for calculation. Hence, the outcome value is only calculated for the third year after the Project began (2020).

⁴² The relaxation of policy was announced in 2020.

Stakeholder		Outcome	Percentage of changes ²⁹	Number of outcomes ³⁰	Duration ³¹	Value in currency (NT\$)	Value of Outcome					
Name	Population/ Number of units						Discount rate (%)			1.04% ³²		
							Year 1 (After the event: 2018)	Year 2	Year 3	Year 4	Year 5	Total
		relaxation of regulations for the motor carrier industry										
		Encouraged investments from the private sector	NA	1	0.5	6,666,667	-	-	1,000,000 ⁴³	-	-	1,000,000
		Increased workload and communication pressure	NA	18 ⁴⁴	2.58	(50,463)	(74,512)	(76,640)	(26,824)	-	-	(177,976)
Academics	2	Gained a greater sense of achievement as research	100%	2	2.5	4,575,000	0 ⁴⁵	0	0	-	-	0

⁴³ Inputs of private resources began in 2020.

⁴⁴ A total of 18 civil servants handled rural transportation affairs within the Project's scope.

⁴⁵ Deadweight is 100%

Stakeholder		Outcome	Percentage of changes ²⁹	Number of outcomes ³⁰	Duration ³¹	Value in currency (NT\$)	Value of Outcome					
Name	Population/ Number of units						Discount rate (%)			1.04% ³²		
							Year 1 (After the event: 2018)	Year 2	Year 3	Year 4	Year 5	Total
		results were verified										
Audience	16,618	Drew attention to and reflection on the issue of rural transportation and social inclusion	90%	14,952	2.04	2,565	-	-	14,804,027 ₄₆	10,216,960	310,545	25,331,533
Total present value (PV)							52,057,479					
Total inputs							2,169,570					
Social Return on Investment (SROI)							23.99					

⁴⁶ After engagement and analysis, we determined there was no significant difference in the outcomes of audience members who saw the reports in different years. Most audience members (68.59%) said that they saw the Project's reports in 2020, so we began calculating the impact of their outcomes in 2020.

Section II Sensitivity Analysis

Since the calculation of SROI takes qualitative and narrative information, which is not quantified, and assigns monetary value to it, there is a great deal of assumption and estimation involved. The SROI standards require that each analysis report include a sensitivity analysis and disclose relevant information, to ensure that the results are objective and verifiable.

The adjusting factors and financial proxies in this analysis report were calculated using weighted average or actual costs, expenses, or budgets. We adjusted the original SROI result, population, adjusting factors, and financial proxies based on the principle of Do Not Over-claim, so as to remain strict and objective. We thus arrived at an SROI sensitivity analysis range between 12.65 and 38.98 for this project. The various adjustments are described as follows:

Adjustment	Details	SROI rate
SROI rate	We determined the reasonable range of SROI to be the calculated value plus and minus 10%.	26.39
		21.59
Displacement	0% adjusted to 10%	22.01
	10% and under adjusted to 30%	17.12
Drop-off	0% adjusted to 10%	23.98
	10% and under adjusted to 30%	23.95
Population	The audience's population is calculated using the "number of people who interacted on Facebook."	36.81
Financial proxies for outcomes	When valuing the outcome "Elevated transportation safety" of users, we considered the probability of a traffic accident and the average cost of accidents in literature ⁴⁷ (traffic accident rate * amount of compensation).	17.67
	We referenced literature ⁴⁸ when valuing the outcome "Elevated transportation safety" of users, using the upper limit of compulsory liability insurance claims (NT\$2.2 million) as the financial proxy.	22.50
	After engagement and examining the implementation status of public transportation projects by each county/city, the actual scope of Happiness Bus and bus route extension was approved for all counties and cities in Taiwan. Hence, we used the actual budget ⁴⁹ approved for the policy for all of Taiwan in 2018-2020 when valuing the government outcome "Expanded and accelerated the implementation of current policy." When valuing the outcome "Integrated Cross-departmental resource, and facilitated the relaxation of regulations for the motor carrier industry," we	38.98

⁴⁷ Please refer to Appendix 1, References 4 and 8-9

⁴⁸ Please refer to Appendix 1, References 4 and 8-9

⁴⁹ Please refer to Appendix 1, Reference 3

	referenced literature ⁵⁰ and the scope of the "68 townships in Taiwan" that are applicable to the policy for calculation, and calculated the amount of fines for one vehicle per township.	
	When valuing the audience's outcome "drew attention to and reflection on the issue of rural transportation and social inclusion," we used the actual amount of donations and supplies for calculation.	12.65

⁵⁰ Please refer to Appendix 1, Reference 13

Section III Verifying outcomes

In the third phase of engagement to validate outcomes, we confirm all the outcomes and the content of the analysis with the stakeholders. In addition, to ensure that all of the research and analysis results are in line with the actual situation, we also referred to relevant literature⁵¹ during the engagement process. The verification process is as follows:

I. Verification of the outcome chain of events

We asked stakeholders to verify if the outcome chain of events and causality were consistent with their experience. Since the outcome chain of events summarizes stakeholder feedback from interviews and the questionnaire survey, during the validation phase most of the stakeholders agreed that the course of outcomes depicted in the chain of events matched their experience.

II. Validation of calculation results

We explained the logic and meaning of the impact map to stakeholders, especially the financial proxies, and then further verified the importance of outcomes to stakeholders, as well as other adjusting factors, in order to determine if they are consistent with the final results. Results show that stakeholders all agreed with our calculation results, and believed it matched their experience and feedback.

III. Other suggestions and thoughts:

In the final phase of engagement for validating outcomes, we once again asked stakeholders if there were any material and significant impacts or changes that were not included, or if they had any suggestions for improving the Project. We shared the recommendations and conclusion we collected with the Project, and included them in the conclusion of our report.

A summary of the engagement process is provided below:

✓ Local organization:

We conducted telephone interviews during this phase, and described the chain of events, outcomes of the Project, and calculation results over the phone. We then asked the person in charge of the local organization to provide feedback or discuss issues. When we asked the second time, the person in charge said that greater name recognition not only brought additional supplies, but also had a negative impact. Some of the donors did not take the organization's needs into consideration, and simply donated things they did not need, which caused some trouble for the organization at the time. After the person in charge and volunteers put their heads together, they used the supplies they did not need for other purposes, such as using torn clothing as materials for arts and crafts classes for the elderly. As the organization gradually expanded its scope of services, it had access to an increasing amount of supplies, and the once negative impact was no longer an

⁵¹ Please refer to references in Appendix 1

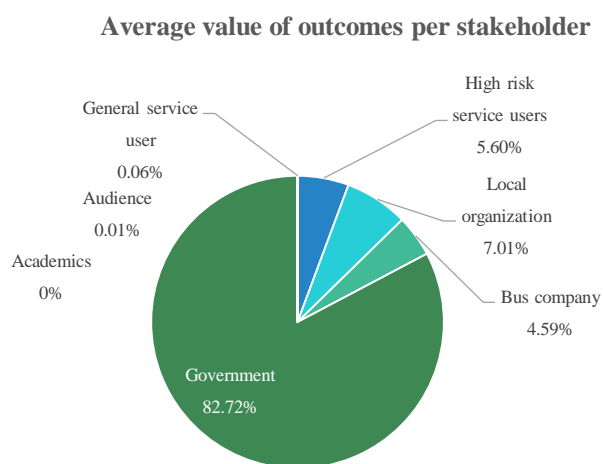
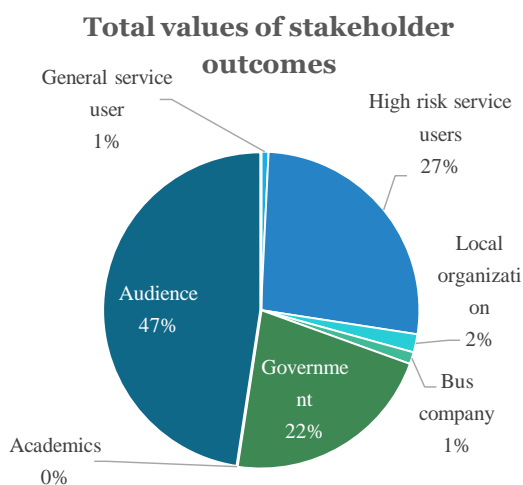
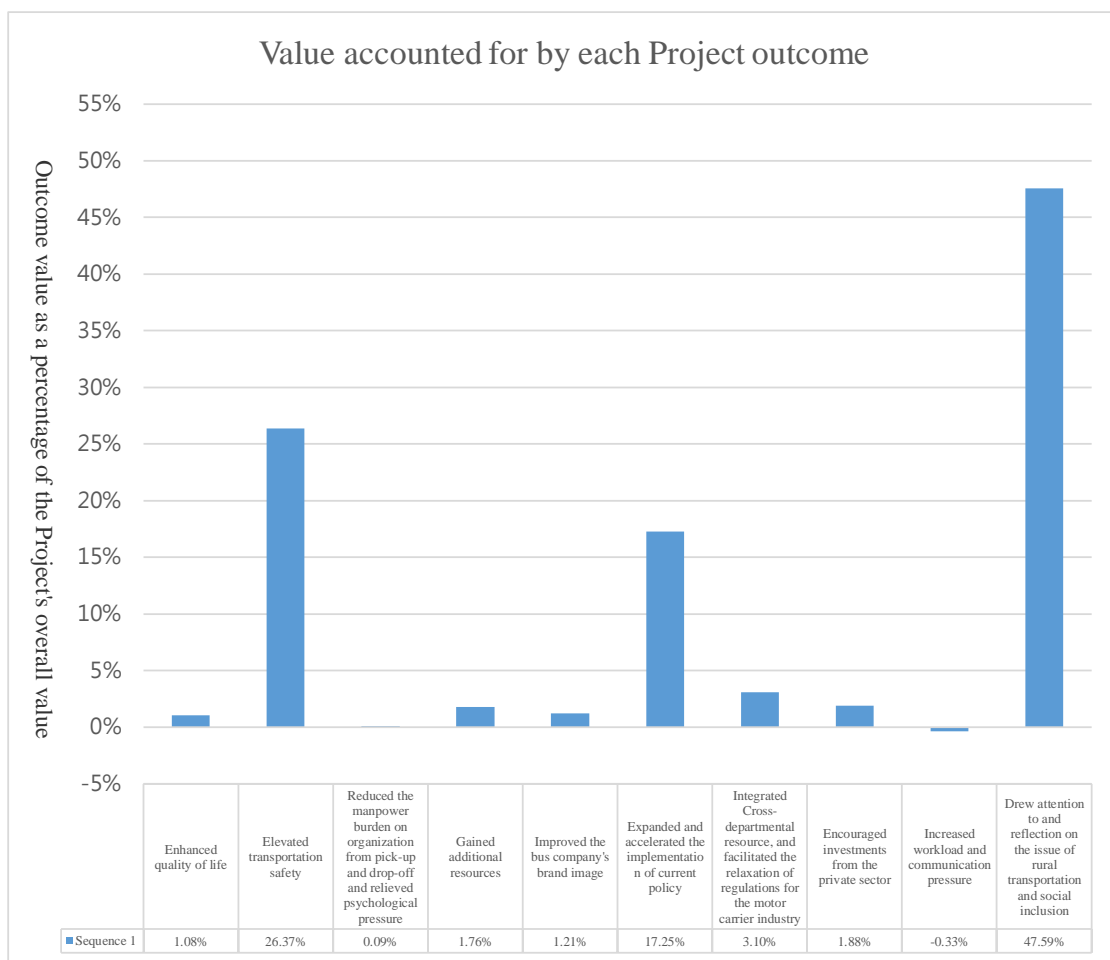
issue. After discussion, we did not include the situation into calculations due to its limited impact on the organization.

- ✓ Government:
We conducted telephone interviews during this phase and described the chain of events and calculation results over the phone. We then asked them provide feedback or discuss issues. When we were discussing the outcome "Expanded and accelerated the implementation of current policy," the stakeholder said that the percentage of funds used to subsidize Happiness Bus increased because of the Vision Project's reports. In other words, the reports caused the stakeholder to make budget adjustments. Hence, we adjusted the outcome's displacement to 10% to reflect on stakeholder feedback.

- ✓ Bus operator:
We conducted telephone interviews during this phase and described the chain of events and calculation results over the phone. We then asked them to provide feedback or discuss issues. The bus operator did not have any other opinions and agreed with our calculation results.

Chapter 5 Conclusion

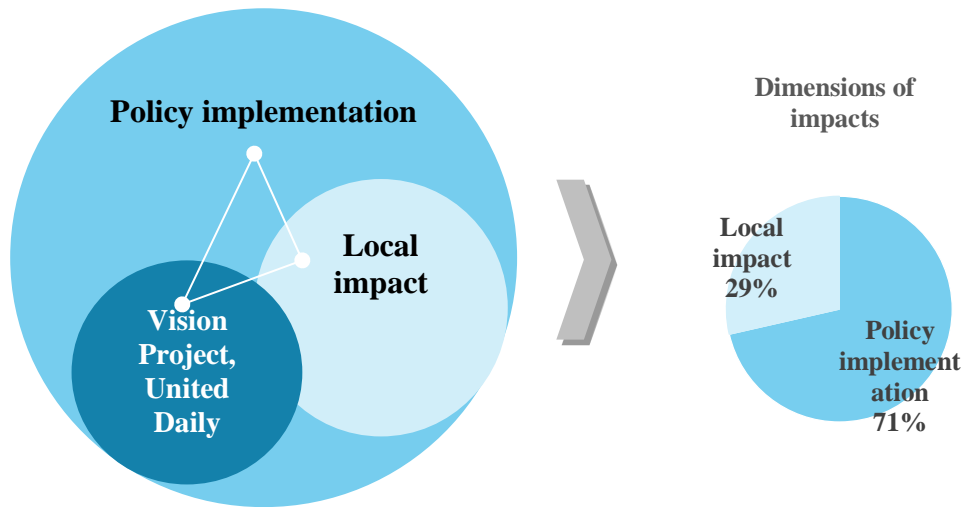
Section I Project outcome analysis



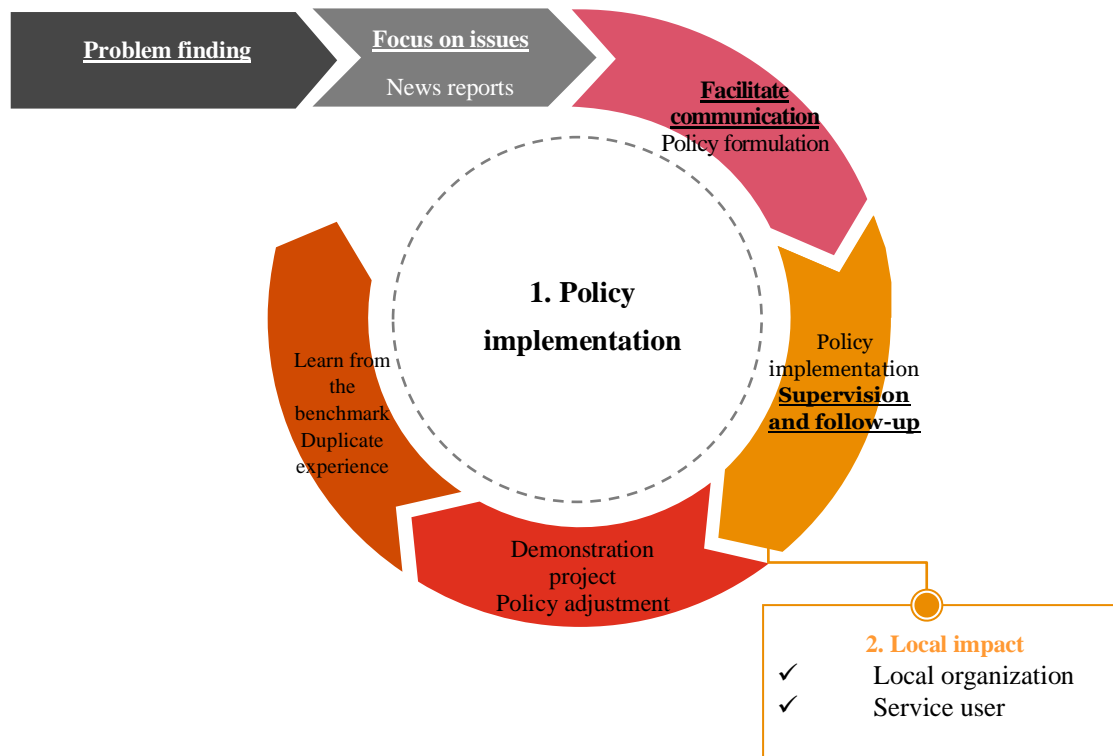
Based on our evaluation, the Project's reports on rural transportation and social inclusion had 11 outcomes, in which the top two outcomes with the highest value were "Drew attention to and reflection on the issue of rural transportation and social inclusion" and "Elevated transportation safety." If we further analyze "Total values of stakeholder outcomes" and "Average value of outcomes per stakeholder," we can see that the audience's outcome "Drew attention to and reflection on the issue of rural transportation and social inclusion" had the highest overall value, showing the extensive reach of the reports. However, if we consider the average value of outcomes per stakeholder, the percentage significantly decreases. "Elevated transportation safety," an outcome of high risk service users, had the second highest value. If "Elevated transportation safety" is analyzed by average outcome value per unit, then it accounts for 5.54%, which shows the depth of impact and value of the outcome to high risk service users. During the engagement process, service users said they clearly felt that the government took the rights and interests of rural area residents seriously.

Outcomes with the third to fifth highest value were "Expanded and accelerated the implementation of current policy," "Integrated Cross-departmental resource, and facilitated the relaxation of regulations for the motor carrier industry," and "Encouraged investments from the private sector." All three of the outcomes were government outcomes. Analyzing the "percentage of total value accounted for by outcomes of each stakeholder type," all government outcomes collectively accounted for 22% of the Project's overall impact. If we analyze the "average outcome value per unit of stakeholder," then the government accounts for 82.72%. If we only add positive values of the three government outcomes, then "average value of outcomes per stakeholder" accounts for 83.99%. This shows that the government was the most significantly impacted stakeholder by the Project, and the impact corresponds to the Project's original intention, which is to use the power of media reports to make the government adjust and improve its rural transportation and social inclusion related policies.

Section II Project Impact and Outlook



The Project aims to create an impact and change policies, and dedicated its efforts to making Taiwan a better place by reporting on rural transportation and social inclusion in 2018-2020. After evaluating the Project's impact and engaging stakeholders, we learned that the Project's impacts can be divided into two aspects, "policy implementation" and "local impact," which accounted for 71% and 29%, respectively. We further summarized key development factors of impacts in the two aspects as follows:



1. Policy implementation

Key factors of impact development	Description
Focus on issues News reports	The Project's reports on rural transportation and social inclusion have impacted "policy implementation" to a certain extent. Starting from problem finding, looking into local needs and issues, and then clearly focusing on issues, we also searched for resources and academics, and then prepared a series of reports that explain professional contents in simple words and stories, allowing the public to quickly understand the issue being communicated and discussed.
Facilitate communication Policy formulation	In addition to the series of reports, the Vision Project also invited industry, government, and academia to participate in a workshop, building a communication channel for different sectors to discuss current issues and policies. Furthermore, the decision-making of policies also plays an important role. The highest level decision-maker of transportation in the Project is Lin Chia-lung, Minister of Transportation and Communications. After the Project's reports on rural transportation and social inclusion, Minister Lin immediately looked into the issue, and also gave his word to integrate resources across departments during the workshop for turning around rural transportation and social inclusion, especially the Ministry Of Education(MOE), Ministry of Health and Welfare(MOHW), and Council of Indigenous Peoples, which will provide integrated services that will connect the last mile for rural area residents and the underprivileged.
Policy implementation Supervision and follow-up	After industry, government, and academia have a consistent goal, the decision-maker will be able to smoothly adjust, implement, and allocate resources for public policy. The Vision Project not only reports on issues at the front end, but also follows up on the issues to understand the response and progress of related departments. It is also concerned about whether or not the issue was actually resolved. The follow-up reports force the government to face the issue, so that the issue will be truly resolved.
Demonstration project Policy adjustment	After policies are implemented and resolve issues, whether or not any revisions or improvements can be made in the process is determined, so that the contents of policies are aligned with the needs of each area.
Learn from the benchmark Duplicate experience	Methods and processes that can effectively resolve issues can be used as a template for other areas or departments in similar situations or departments with similar experience, allowing successful experiences to be duplicated and impact the right areas

	and stakeholders, which will improve the overall benefits provided by policies.
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Based on stakeholder feedback, the Vision Project played an important role in **problem finding, focusing on issues, facilitating communication, and supervision and follow-up**. However, every link and factor must be closely connected, and the government must be able to receive this information and respond accordingly, so that benefits from overall policy implementation can be maximized. We expect policies to continue to reach even more areas in Taiwan, so that even more stakeholders can benefit from policy adjustments.

2. Local impact

Key factors of impact development	Description
Local organization	In the Project, the local organization plays a key role in terms of local impact, and it connects policy implementation with local users, such as assisting service users with making reservations for Happiness Bus, allowing policy resources to be effectively applied, so that benefits will appear.
Service user	Most service users in the Project are unfamiliar with taking public transportation tools, because such tools were not available in the past, they do not frequently have such needs, or such tools were not friendly or uncomfortable. As a result, stakeholders were not in the habit, did not know how to, or were even afraid of taking public transportation tools. Policies will not have an impact if they are utilized by stakeholders. Hence, the actions taken by service users are crucial to the Project's impact.

In summary, the local organization and service users play a key role in local impact, and the assistance of local organizations allows policies to be connected to the users that actually need them. This way when policies are expanded to other areas, local organizations that have the best understanding of local needs can provide assistance to maximize the benefits from the resources. With regard to actual resource used by users, instructions and concepts for resource use must first be provided at the front end, so that users will understand how to use the resources and know who to talk to if they have any questions or other recommendations and opinions. Support measures are required to understand stakeholders' needs and allow them to actually use the resources. When policies are implemented in different areas, adjustments will need to be made based on the local situation. We hope that users' situation and needs will be considered during planning from the front end, so that users will feel that the policies meet their actual needs after implementation.

"Transportation" is the biggest service issue there is as it links together stakeholders' different needs. The issue and scope evaluated by the Project demonstrates top-down connection and cooperation. The media plays a key role in overall policy development by reporting problems it finds, and clarifying,

communicating, and supervising issues. This allows policy implementation to be more focused, faster, and better aligned with actual needs. We hope the Project will not forget its original intention and continue to report on major public issues, driving positive change in the issues to make Taiwan a better place.

Appendix 1 References

No.	Name	Type
1	A Guide to Social Return on Investment(2012)	Principle from Social Value International
2	Standard on Applying Principle 1:Involve Stakeholders(2019)	Principle from Social Value International
3	Implementation status of highway public transportation projects (as of October 2020). March 2021, retrieved from: https://www.thb.gov.tw/sites/ch/modules/download/download_list?node=11dad9e-944d-44ff-8d83-f5f67e2f1639&c=00a8dc11-7988-4946-8aea-9a6fe8ca7302	Statistics
4	Institute of Transportation, MOTC (2019). A Study on Estimating the Cost of Road Traffic Accidents	Research report
5	MOTC (2021). Transportation Painter: Lin Chia-lung and Innovative Governance of Humanity-Oriented Transportation (Second Edition)	Book
6	Institute of Transportation, MOTC (2018). An Integrated Study on Prearranged Handicap Accessible Car Service	Literary work
7	MOTC (2016). Intelligent Transportation System Development Plan (2017-2020)	Government project
8	Feng Chia University e-paper (2018). The difference between justice and insurance claim in Taiwan	Research report
9	National Police Agency (2014). Analysis of Characteristics of Elderly Drivers Involved in Road Traffic Accidents in 2013	Research report
10	Constructive News: How to save the media and democracy with journalism of tomorrow (Ulrik Haagerup, 2017)	Book
11	FROM MIRRORS TO MOVERS: Five Elements of Constructive Journalism (Cathrine Gyldensted, 2015)	Book
12	The Agenda-Setting Function of Mass Media (Maxwell E. McCombs and Donald L. Shaw, 1972)	Periodical
13	Traffic Safety Committee, MOTC https://168.motc.gov.tw/theme/news/post/1906121103485	News announcement
14	The benefits of Rural Community Transport Social Return on Investment Report (Gauge NI, 2016)	SROI Report
15	2017Mercury Vapor Street Lamp Replacement Project: A Social Return on Investment (SROI) Analysis Report (LITE-ON Technology Corp., 2018)	SROI Report

16	United Way of Taiwan 2017 Social Impact Social Return on Investment Report	SROI Report
17	Ministry of Transportation and Communications 2018 Policy Performance Report (MOTC, March 28, 2019)	Government announcement
18	Ministry of Transportation and Communications 2019 Policy Performance Report	Government announcement
19	Ministry of Transportation and Communications Operational Overview Report (MOTC, March 12, 2018)	Government announcement
20	Ministry of Transportation and Communications Operational Overview Report (MOTC, October 8, 2019)	Government announcement
21	Ministry of Transportation and Communications Operational Overview Report (MOTC, March 4, 2020)	Government announcement
22	Ministry of Transportation and Communications Operational Overview Report (MOTC, October 12, 2021)	Government announcement
23	10-Year Long-Term Care Project 2.0 (2017-2026) (Approved version) (Ministry of Health and Welfare, December 2016)	Government announcement
24	Ministry of Health and Welfare Trial Program for Increasing Transportation Capacity in Areas with Insufficient Long-term Care Resources	Government announcement

Appendix 2 Interview Outline and Questionnaire

➤ **Interview outline (take government departments outline as an example)**

Basic information on the interviewee
Name:
Department/Position:
Role in the event/project (type of stakeholder):
Interview Outline
<p>I. Project participation</p> <ol style="list-style-type: none"> 1. Can you briefly describe developments in government policy for rural transportation and social inclusion and situations or issues that have existed for a long period of time? What is your expectation or what benefit do you expect from the government's rural transportation and social inclusion service policy? 2. What is your role in rural transportation and social inclusion issues (Happiness Bus service/bus route extension)? When do you start to involve? Can you briefly describe your interactions with the Vision Project, United Daily News Group, companies, government, other organizations, and local residents? Who or which departments do you consider as main contributors for Happiness Bus/bus route extension? Why? 3. How much do you spend in this Project? When do you start to invest? Approximately how much are funding, subsidies, projects, subsidies, and research expenses each year? 4. Please briefly describe your responsibility in your department or your daily life before Happiness Bus/bus route extension project. <p>II. Changes in outcomes</p> <ol style="list-style-type: none"> 5. After the Project's reports and workshop, were there any changes or impacts (recognition, thoughts, attitude, or behavior) to the government's policy formulation or adjustment or to your/your department's role (supervising the government, expediting policy

formulation or adjustments)?

6. How effective do you think the government has been in transportation policy formulation or adjustment, the Happiness Bus policy implementation and bus route extension service so far? What changes or impacts (recognition, thoughts, attitude, or behavior) has it brought to stakeholders (local residents, companies, other organizations, etc.)?
7. Which of the above changes do you think are more important?
 - a. What is the most important change? What is the second important change?
 - b. Which of the above changes do you think are especially important?
8. Based on your observations, how long have these changes lasted? Or how long do you think these changes will last?
9. Without the Project's reports and workshop (or Happiness Bus/bus route extension into villages), how likely do you think it would be that those changes you just mentioned would have happened? (very likely/likely/unlikely/impossible)
10. Did the Project's reports and workshop have a negative impact on the government's policy formulation or adjustment or on your/your department's role (supervising the government, expediting policy formulation or adjustments)?
11. Have you felt or heard passengers share the influence of Happiness Bus/bus route extension?
12. Do you have any other thoughts or recommendations regarding the Project's reports and workshop as well as the Happiness Bus/bus route extension into villages?

➤ **Questionnaire contents (take questionnaire for the audience as an example)**

Questionnaire items

1. Basic information

1.1 Have you ever seen any reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion "? (e.g., Examination of Transportation Justice, report on elderly driver in Xuhai, bus route extension into Chiayi Zhouzi Village, meal delivery, etc.)

- Yes, I have seen reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion "
- No, I have not seen reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion "
(selecting this will directly end the questionnaire, and the questionnaire will not be effective)

1.2 Where did you see reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion " (Check all that apply)?

- Newspaper of United Daily News Group
- Official website of the Vision Project, United Daily News Group
- Facebook page of the Vision Project, United Daily News Group
- Instagram of the Vision Project, United Daily News Group
- YouTube channel of the Vision Project, United Daily News Group
- udn.com
- e-Newsletter of the Vision Project, United Daily News Group
- Website of United Way Taiwan
- Other (please specify): _____

1.3 When did you see reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion "?

- 2018

2019

2020

1.4 After seeing reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion," did you subscribe to the Project's e-newsletter?

I was already a subscriber

I subscribed after seeing the report

I am not a subscriber

Next, based on interviews with the audience, we summarized possible outcome brought by the changes, and would like to ask you more about the details of this outcome:

2. Drew attention to and reflection on the issue of rural transportation and social inclusion

2.0 After seeing reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion," did it change or impact your personal recognition, opinions, or attitude in any of the following ways?

Yes

Maybe

No impact at all. Skip to testlet 3 if this is selected

2.1 (Outcome indicator) After seeing reports of the "Vision Project, United Daily News Group – Rural Transportation, and Social Inclusion " did it change or impact your personal recognition, opinions, or attitude in any of the following ways? (Please check and answer, check all that apply)

Improved my understanding of rural transportation and social inclusion issues

I will browse through information related to rural transportation and social inclusion more often, like and share posts on rural transportation and social inclusion, or write related posts or blogs.

I am willing to participate in rural transportation and social inclusion related workshops, initiatives, or volunteer activities.

- I am willing to make a donation to improve rural transportation and social inclusion.
- I have already made a donation to improve rural transportation and social inclusion.
- Other (please specify): _____
- None** of the situations above occurred **Skip to testlet 3 if this is selected**

2.2 (Degree of change) How much did reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion " change the amount of attention you paid to or reflected on rural transportation and social inclusion issues?

- Changed greatly (100%)
- Changed a lot (75%)
- Changed some (50%)
- Changed a little (25%)
- No change (0%) **Skip to testlet 3 if this is selected**

2.3 (Importance of outcome) With regard to the changes in amount of attention you paid to or reflected on rural transportation and social inclusion issues after seeing the reports of "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion," how important were the changes to you? (0-10 points, 0 points represents not important at all, 10 points represents very important)

How important is the outcome "Drew attention to and reflection on the issue of rural transportation and social inclusion " means to you? _____

2.4 (Financial Proxy) After seeing the reports of the "Vision Project, United Daily News Group," how much money are you willing to donate to improve rural transportation and social inclusion? (Please fill in the amount you are willing to donate and not the amount you have already donated)

- Regular donation of NT\$5,000 per month (NT\$60,000 per year)
- Regular donation of NT\$2,000 per month (NT\$24,000 per year)

- Regular donation of NT\$1,000 per month (NT\$12,000 per year)
- Regular donation of NT\$600 per month (NT\$7,200 per year)
- One-time donation of NT\$10,000
- One-time donation of NT\$5,000
- One-time donation of NT\$2,500
- One-time donation of NT\$1,200
- Other, regular donation of NT\$__ per month
- Other, one-time donation of NT\$__
- Unwilling to donate, please specify:

2.5 (Duration) How long do you think the change "Drew attention to and reflection on the issue of rural transportation and social inclusion " will last?

- One year. **Skip to testlet 2.7 if this is selected**
- Two years
- Three years
- Four years
- Other (please specify):

2.6 (Drop-off) Continuing from the above question, if the change can last for more than a year, will the impact of the change decrease year by year?

- I think the impact of the change will not decrease year by year; it will stay the same every year.
- I think it is unlikely that the impact of the change will decrease year by year.
- I think the impact of the change will decrease by half every year.
- I think the impact of the change will decrease a lot every year.
- Other (please specify):

2.7 (Attribution) Besides reports of the Vision Project, United Daily News Group, were there any other factors that contributed to the change "Drew attention to and reflection on the issue of rural transportation and social inclusion "?

- All of it was due to the Vision Project, United Daily News Group
- Most of it was due to the Vision Project, United Daily News Group
- Half of it was due to the Vision Project, United Daily News Group
- Some of it was due to the Vision Project, United Daily News Group
- Completely due to other factors
- Other (please specify):

2.8 (Deadweight) If there were no reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion," would the change "Drew attention to and reflection on the issue of rural transportation and social inclusion " still occur?

- It would not occur at all
- There is a slight chance it would occur
- A 50% chance it would occur
- There is a considerable chance it would occur
- It will definitely occur
- Other (please specify):

3. Attitude toward Vision Project, United Daily News Group

3.1 Did reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion " improve the brand favorability of United Daily News Group in your opinion? (0 points represents no favorability, 10 points represents high favorability)

Original brand favorability of the Vision Project, United Daily News Group (before seeing the reports in May 2018) (0-10 points)

Current brand favorability of the Vision Project, United Daily News Group (after seeing the reports in May 2018) (0-10 points)

3.2 Do you have any other recommendations or thoughts on reports of the "Vision Project, United Daily News Group – Rural Transportation and Social Inclusion " that you would like to share?

Yes; please specify

No

3.3 Please provide your contact information if you are willing to be interviewed

Email

Mobile phone

➤ **Verified interview outline (take service users outline as an example)**

Verified contents	Special discussions
Completeness of stakeholders	Should stakeholders' family members be included in the stakeholder analysis
Correctness of descriptions and calculations of inputs and outputs	Reconfirmed the correctness of resources input
Discussion on the outcome chain of events	<ul style="list-style-type: none">• Discuss if the outcomes are well-defined outcomes and reconfirm the degree of change and importance of outcomes to stakeholders• Discuss negative outcomes and the materiality of their impacts, such as displacement of public resources, negative labels, etc., to make sure that important negative outcomes were not overlooked
Discuss quantified data of outcomes	Discuss the number of outcomes, duration, reasonableness of indicators, and basis of calculation
Reasonableness of the calculation process and the selection of financial proxies	Discuss the source of financial proxies and explain why financial proxies are needed

Verified contents	Special discussions
Discussion on stakeholder subgroups	Discuss if there are other factors that will affect subgroups of stakeholders, as well as the reasonableness of current subgroups of stakeholders
The decision-making process and reasonableness of influencing factors	Once again explain the contents and calculation methods of influencing factors
Final calculation results	Report figures and sensitivity analysis

Appendix 3 List of Outcome Indicators

Stakeholder Name	Description of outcome	Indicator
General service user	Enhanced quality of life	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> Felt it has become more convenient to take the bus to go out <input type="checkbox"/> Residents felt that taking the bus became more comfortable <input type="checkbox"/> Residents are more willing and more frequently take the bus to go out <input type="checkbox"/> Residents are more willing and more frequently take the bus for an outing <input type="checkbox"/> Residents are more willing and more frequently take the bus to the hospital, and it made them healthier
High risk service users	Enhanced quality of life	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> Felt it has become more convenient to take the bus to go out <input type="checkbox"/> Residents felt that taking the bus became more comfortable <input type="checkbox"/> Residents are more willing and more frequently take the bus to go out <input type="checkbox"/> Residents are more willing and more frequently take the bus for an outing <input type="checkbox"/> Residents are more willing and more frequently take the bus to the hospital, and it made them healthier
	Elevated transportation safety	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> Residents feel safer taking the Happiness Bus with a young driver compared to taking the elderly driver's personal-use vehicle in the past <input type="checkbox"/> Family and friends are less worried when they take the Happiness Bus to go out <input type="checkbox"/> Residents are more willing and more frequently take the bus to go out
Local organization	Reduced the manpower burden on organization from pick-up and drop-off and relieved psychological pressure	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> Felt more at ease letting elderly people take the bus to go out <input type="checkbox"/> The organization did not need as many people to pick up, drop off, and take care of elderly people
	Relieved financial burden	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire:

		<input type="checkbox"/> More private organizations expressed their intentions to make donations and number of inquiries increased <input type="checkbox"/> Obtained additional steady sources of donations from the private sector <input type="checkbox"/> The organization received more resources from the government (such as teaching resources or invitations to events)
Bus operators	Improved the bus operator's brand image	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> More citizens recognized the company after bus route extension (into the village) <input type="checkbox"/> Interviews and reports by other media after the bus route extension (into villages) increased your department's exposure <input type="checkbox"/> Your department felt recognition from the public in the bus route extension process <input type="checkbox"/> Your department attached greater importance to communicating with citizens <input type="checkbox"/> Your department more frequently communicated and interacted with citizens to understand their transportation needs
Government	Expanded and accelerated the implementation of current policy	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> Your department and the competent authority have become more concerned about rural transportation and social inclusion issues, and responded by make adjustments to project budgets or policy implementation. <input type="checkbox"/> Your department and the competent authority improved work and resource allocation efficiency for rural transportation and social inclusion cases <input type="checkbox"/> Your department felt recognition from the public in the improvement process <input type="checkbox"/> Improvement of rural transportation and social inclusion caused even more departments from different areas to actively inquire about application/implementation of Happiness Bus
	Integrated Cross-departmental resource, and facilitated the relaxation of regulations for the motor carrier industry	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> Your department and the competent authority have become more concerned about rural transportation and social inclusion issues, and responded by make adjustments to project budgets or policy implementation.

		<input type="checkbox"/> Your department and the competent authority improved work and resource allocation efficiency for rural transportation and social inclusion cases <input type="checkbox"/> Your department felt recognition from the public in the improvement process <input type="checkbox"/> Improvement of rural transportation and social inclusion caused even more areas to actively inquire about application/implementation of personal-use vehicles in rural areas
	Encouraged investments from the private sector	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> Your department and the competent authority have become more concerned about rural transportation and social inclusion issues, and responded by make adjustments to project budgets or policy implementation. <input type="checkbox"/> Your department and the competent authority improved work and resource allocation efficiency for rural transportation and social inclusion cases <input type="checkbox"/> Your department felt recognition from the public in the improvement process <input type="checkbox"/> Due to the improvement in rural transportation and social inclusion, even more private organizations and schools inquired about how to input or access related resources
	Increased workload and communication pressure	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> Your department felt stress from work or communication with other units (competent authority, local government, bus operator, and local residents) <input type="checkbox"/> Rural transportation and social inclusion related affairs increased workload, and displaced other work, and it is necessary to work overtime to complete the work
Academics	Gained a greater sense of achievement as research results were verified	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> More frequently discussed rural transportation and social inclusion issues with the media and government, and also learned interpretation in the process of working with the media (how to transform academic specialty into knowledge that citizens can understand) <input type="checkbox"/> More frequently invited to rural transportation and social inclusion related seminars or lectures after the reports <input type="checkbox"/> More frequently invited to serve as consultants to the government for policy formulation after the reports

		<input type="checkbox"/> Received more government projects (e.g. MOTC, MOST, and MOE projects) after the reports <input type="checkbox"/> Contacted by different government departments for rural transportation and social inclusion matching systems (e.g. Donkey Move) after the reports, creating more business opportunities and gaining greater exposure
Audience	Drew attention to and reflection on the issue of rural transportation and social inclusion	Responded any one of the following facts (recognition, attitude, behavior) in the questionnaire: <input type="checkbox"/> Improved my understanding of rural transportation and social inclusion issues <input type="checkbox"/> I will browse through information related to rural transportation and social inclusion more often, or help like and share posts on rural transportation and social inclusion, or write related posts or blogs. <input type="checkbox"/> I am willing to participate in rural transportation and social inclusion related workshops, initiatives, or volunteer activities. <input type="checkbox"/> I am willing to make a donation to help improve rural transportation and social inclusion. <input type="checkbox"/> I have already made a donation to help improve rural transportation and social inclusion.

Appendix 4 List of Financial Proxies

Stakeholder		Description of outcome	Financial proxies	Valuation (NTD)	Source
Name	Subgroup				
Users	General service user	Enhanced quality of life	Transportation expenses saved by taking Happiness Bus	\$16,051	Interviews
	High risk service users	Enhanced quality of life	Transportation expenses saved by taking Happiness Bus	\$16,051	Interviews
		Elevated transportation safety	Average compensation amount per accident	\$2,879,386	1. Questionnaire 2. The difference between justice and insurance claim in Taiwan
Local organization	NA	Reduced the manpower burden on organization from pick-up and drop-off and relieved psychological pressure	Reduced labor costs for fewer number of trips	\$132,000	1. Interviews 2. Hourly wage of care attendants according to regulations of the Department of Long-term Care, MOHW
		Relieved financial burden	Average market value of resources donated each year	\$660,000	Interviews
Bus operator	NA	Improved the bus operator's brand image	Average newspaper advertisement rate of the United Daily New Group for one year	\$862,000	1. Interviews 2. Questionnaire
Government	NA	Expanded and accelerated the implementation of current policy	Actual amount of subsidies from transportation policies of Chiayi County in 2018	\$59,548	Questionnaire
			Actual amount of subsidies from transportation policies of	\$4,870,865	County/City Government Public Transportation

			Chiayi County and Pingtung County in 2019		Subsidy Project of the Directorate General of Highways
			Actual amount of subsidies from transportation policies of Chiayi County and Pingtung County in 2020	\$47,758,805	County/City Government Public Transportation Subsidy Project of the Directorate General of Highways
		Integrated Cross-departmental resource, and facilitated the relaxation of regulations for the motor carrier industry	After legalizing the use of personal-use vehicles to carry customers in rural areas, the amount of fines drivers are able to avoid plus the amount of government subsidies	\$7,262,980	<ol style="list-style-type: none"> 1. News reports 2. Article 77, Subparagraph 2 of the Highway Act: "Those who manage an automobile or trolleybus transportation enterprise without applying for sanction" 3. Internal data of the Directorate General of Highways, MOTC (Pingtung Happiness Bus 2.0 Integrated Service Demonstration)
		Encouraged investments from the private sector	Actual amount of resources provided by the private sector	\$6,666,667	<ol style="list-style-type: none"> 1. News reports 2. Response from Kaohsiung Motor Vehicles Office

					3. Internal data of the Directorate General of Highways, MOTC (Pingtung Happiness Bus 2.0 Integrated Service Demonstration)
		Increased workload and communication pressure	Overtime pay for civil servants	(\$50,463)	1. Interviews 2. 1111 Job Bank – Average salary of civil servants
Academics	NA	Gained a greater sense of achievement as research results were verified	Weighted average of value of outcomes able to achieve the same sense of achievement	\$4,575,000	1. Interviews 2. Questionnaire
Audience	NA	Drew attention to and reflection on the issue of rural transportation and social inclusion	Average amount willing to donate each year to help improve rural transportation and social inclusion	\$2,565	Questionnaire

