

SOCIAL IMPACT ASSESSMENT GUIDELINES: HOW to ASSESS the OUTCOMES and VALUE of SOCIAL ENTERPRISES' TRAINING PROGRAMS

RATIONALE

What's the use of assessing social workers' training?

Why should we actually estimate the social, environmental and economic value produced?

What most matters in our life doesn't have a market price: the love for our children, friends and dear ones, the pleasure given by a landscape or the sunset and so on.

Likewise, trainings, projects and services provided by social enterprises and the third sector organizations with their time and skills have impacts and produce **social value unaccounted for**.

Here we redefine value: we assign a value to what we actually value like the increase of knowledge and growth of professional skills through training programs.

The value generated by trained staff as well as by other direct and indirect beneficiaries remains unaccounted for or underestimated: it isn't included in financial accounting as if non-existent, remaining invisible over time.

We lack the **understanding of the actual value produced** by social enterprises' trainings and projects. As a result, public institutions and private investors may not value and be willing to invest projects creating positive social impacts: they do not see the money saved or gained by the outcomes and the long-term positive impacts produced by social organizations' growth and activities.

To overcome this shortcoming, there are methodologies that provide understanding of the actual value created or destroyed by training and social activities.

One methodology is the Social Return on Investment – generally called "S-ROI". It allows you to tell the story of changes produced, step by step. You keep track of the effects brought about towards different groups of people (called "stakeholders") who are affected by your training program or any other project. At the same time you find how to measure changes produced in quantitative terms (how many people, what type of value) and eventually in monetary terms.

With S-ROI methodology, you to map the all those affecting and affected by a project, you think about, ask and find the changes and outcomes produced, you estimate their monetary value: not from your own personal perspective but from the perspective of the people who actually experienced the changes, to whom you give a voice by interviewing them.



This becomes a structured approach to evaluating the impact of your training programs, where you gain understanding of the impact of your activities and their value from the viewpoint of the actual beneficiaries and people affected, broadening your angle and acquiring a credible comprehensive understanding of the true value produced as well as of the negative effects generated or perceived

It is a process where you learn to ask and listen to people, gathering their feedback about the value felt by training participants and other stakeholders like your organization as such, your clients, team staff, the whole, the organization's partners as well as the broader community.

Key-concepts

Redefine value

Understand the impact generated by your trainings / projects

Map affected groups of people ("stakeholders")

Ask and listen their view about training outcomes

Identify the outcomes

Assign a value to outcomes

BENEFITS

What is the actual benefit of assessing the impact training projects?

The use of assessing your impact training projects is to understand the value of training and any projects.

You learn how to avoid omitting important intangible values, like the gain of skills, the higher job opportunities arising from it, the growth of trained people's self-confidence, the improvement of personal relations and soft skills and so on.

You learn to include and value all social values created in relation to the time and the money invested during a given activity. While using this methodology you will start to see with accuracy the different changes in performance, the actual level of outcome achieved, and whether financial and human resources have been saved or misused, not from your standpoint but through the eyes and the perception of those who experienced changes due to your training. It may be your staff, your clients, your professional partners and suppliers; it may even be your and your team's families, when the content of training is the gain of knowledge on environmental impact reduction, or the development of emotional and social skills.

Your organization can use this S-ROI methodology as your main management tool to:

- inform expenditure
- listen to your staff, partners and clients
- understand check which actions are most valued by people
- check which activities produce results more effectively
- improve performance
- highlight added value.

This process is bottom-up: the value of the changes is always evaluated by the direct recipients of the effects, not by yourself according to your own views.

Outcomes assessment allows you to learn from any undertaking what works and what doesn't work, what can be improved, with the security that this learning comes from the experience of the majority of people you affect in your project/training.

S-ROI analysis tells you a story of positive and negative results obtained and changes produced by your investment as is training program: the story of changes produced, which you sum-up in your Impact Map and you describe through a report, is more important than the final number (so called "S-ROI ratio") obtained. You can see it like an agenda where you report what happened week by week within your family, but not from your angle: from the feelings of your family that you keep asking and listening to: only then we actually learn and can improve.



Case by case, you can use these guidelines to keep track of the effects and outcomes expressed in monetary terms, or to simply identify, map and describe the outcomes, so to gain a comprehensive insight of positive and negative results obtained in relation to the amount of money invested (ex: the cost of training and the hours dedicated by x number of people) based on the opinion of the diverse subjects directly affected (ex: training recipients) and indirectly (ex: your organizations: your clients; your partners, etc.).

SWEET guidelines for assessing training's outcomes aim at helping your social enterprises and third sector's staff to understand the value generated (*ex-post* assessment) or to be generated (*ex-ante* assessment) in relation to the cost and time financed.

This understanding produces a highly useful knowledge about which training activities are most effective for the team and beneficial to the organization.

At a more practical business level, outcome-based assessments are also increasingly required or scored in competitive tendering to estimate the organization's ability to produce effective results.

INTRODUCING the IMPACT ASSESSMENT GUIDELINES

SWEET guidelines lead you to identify and value the tangible and intangible changes produced, from the multiple perspectives of different stakeholders.

The Social Return on Investment (S-ROI) framework is here unfolded in a simplified version, using examples from social enterprises and third sector training programs to better illustrate how to carry out your assessment one step at a time.

S-ROI methodology is kind of a cost-benefit analysis that takes into account also social and environmental costs of an activity as well as its main social and environmental benefits. Giving them a value in money.

It is based on the Theory of Change: every activity we carry out in our life, and *how* we carry it out, produces outcomes and affect other people in some ways.

Understanding the changes that we have produced (valuative analysis) or that we are going to produce (forecast analysis) comes from mapping the activities carried out (outputs), their cost (input), the direct and indirect recipients of our activities (stakeholders), the effects and impacts generated (outcomes).

Additionally, we can assign a financial value to social results which do not have a price in the market with the so-called “financial proxies”. For instance: if we create new education services for adults, what is the financial the value of the instruction of a person? How do we measure the monetary value of new or improved knowledge and acquired skills after a training program? Who is affected by this enhanced knowledge beyond the direct recipients of the training? For instance professional knowledge may lead to “Enhanced employability”; Circular economy training may lead to “Reduced environmental energy consumption”.

The S-ROI framework will help your organization to better understand and plan the overall value of investments made for professionals’ training, by mapping all the different outcomes perceived by every stakeholder and by quantifying in monetary terms the benefits generated.

S-ROI can be used to identify the value of changes that have already occurred (valuative or *ex-post* assessment), as well as to forecast the anticipated value of an investment (forecast or *ex-ante* assessment).

The key steps to approach a SROI calculation for training projects aimed at building hard and soft skills, as well as entrepreneurial competencies for social enterprise professionals are described [here](#) (*add the correct window hyperlink*).

An example of an Impact Map that results from an assessment carried out can be found [here](#) (*add the correct window hyperlink*).

SWEET HANDBOOK

of SOCIAL IMPACT ASSESSMENT: Step-by-step Guidelines

The following handbook aims at guiding you one step at a time to create your social impact assessment to estimate the outcome of your training and the hidden financial value produced. Every chapter needs to be combined with the use of the [Impact Map Template](#) (add the correct window hyperlink) that you will fill with your data. As a further material, you can combine this step-by-step manual with the study of [Impact Map](#) (add the correct window hyperlink) which follows an invented case-study, providing examples to enhance your clarity.

Stage 0

ESTABLISH GOALS & SCOPE

Stage 0 Summary

Here you will define the specific goals of the assessed project as well as the goals of your assessment and the scope of the project to evaluate.

GOALS

What exactly do we want to achieve?

- Define the specific goals of your training.

Note: correctly setting a goal requires to be:

- specific (vs. generic)
- measurable / quantified
- time framed, setting a deadline for the overall goal's achievement.

For example:

"Increasing the organization's external funding 50% by the 31st of December 2026"

is different from a goal not specific, not measurable and with no deadline (see the called "s.m.a.r.t." goal) which isn't a goal but remains a wishful declaration of intentions: *"Increasing the organization's funding as much as possible"*

CASE STUDY examples:

ASSESSING 3 TRAINING PROGRAMS to EMPOWER SOCIAL WORKERS

C.1 Entrepreneurial Skills development

Digital marketing & storytelling Course

- Goal:

"Increasing 25% the sales of services/products by 24 months"

C.2 Soft Skills development

Relational skills training to build social and cultural capital

- Goal:
“Improving work environment and interpersonal relations with clients and partners in 1 year”

C.3 Circular economy Skills development

Research to reduce environmental footprint

- Goal:
“Enabling 100% of the organization’s technical staff:
 - a) to get knowledgeable and able to consult on how to reduce an organization environmental impact
 - b) to reduce the 33% of individual ecological footprints at the workplace
 - c) to propose measure to cut the organization’s emissions and negative externalities”.

SCOPE

What is the scope of the project/activity?

What will you measure?

Clarify the scope of your training for its assessment

This includes specifying:

- the type of training/s and activities to be carried out to achieve the goals
- the timeframe of your activities/investment
- the geographical area, or other details where relevant

CASE STUDY examples:

ASSESSING 3 TRAINING PROGRAMS to EMPOWER SOCIAL WORKERS

C.1 Entrepreneurial Skills development

Digital marketing & storytelling Course

- Goal:
“Increasing 25% the sales of services/products by 24 months”.
- Scope:
“2 staff members of Alfa organization trained in a 20-hour course”.

C.2 Soft Skills development

Relational skills training to build social and cultural capital

- Goal:
“Improving work environment and interpersonal relations with clients and partners, in 1 year”
- Scope:
“A 10-hour training course for 10 staff members to learn how to constructively communicate (expressing the expectations) and active listening”

C.3 Circular economy Skills development

Research to reduce environmental footprint

- Goal:
 - “Enabling 100% of the organization’s technical staff, that is 15 people:
 - a) to get knowledgeable and able to consult on how to reduce an organization environmental impact
 - b) to reduce the 33% of individual ecological footprints at the workplace
 - c) to propose measures to cut the organization’s emissions and negative externalities”
- Scope:
 - “1 circular economy expert team hired for a 12-hour training”.

SROI Third Sector / Social enterprises Training Outcomes Assessment Impact Map			
Organization	Alfa SE	Name & Date	John Smith, 1 st of March 2025
Goals of the project	Increasing Alfa staff’s entrepreneurial, social and circular economy competences		
Goals of assessment	Estimating the value of training for the organization and Alfa’s main stakeholders		
Scope	3 Training Programs: on Marketing, on Relational Skills, on Circular Economy	Time period	2024-2025
Forecast or Evaluation	Evaluation ex-post		

Stage 1

Stage 1 Summary

Here you will reflect upon all groups of people that are subject to changes due to your project and you will map those of them that are relevant to your assessment.

1. MAPPING STAKEHOLDERS

Who experiences changes / outcomes?

Who are the groups that are affected by, or affect, the activity?

Whom does our activity/project have an effect on?

Stakeholders are the groups of people affected by the activity carried out.

For example, stakeholders may be the training “participants”, “trainers”, “social enterprises / organization”, “community members”, “funders” and indirectly even “family members”, etc.

Create a comprehensive list of stakeholders:

Identify all the groups who experienced or will experience changes caused by the organization’s activity.

Within each group of stakeholders (es: trained subjects; organization funding the training; clients etc.), count how many people are affected, since the value of change will be multiplied by the number of affected individuals.

CASE STUDY examples:

ASSESSING 3 TRAINING PROGRAMS to EMPOWER SOCIAL WORKERS

C.1 Entrepreneurial Skills development

Digital marketing & storytelling Course

- Goal:
“Increasing 25% the sales of services/products by 24 months”.
- Scope:
“2 staff members of Alfa organization trained in a 20-hour course”.
- Stakeholders:
 - 2 staff members
 - the organization

C.2 Soft Skills development

Relational skills training to build social and cultural capital

- Goal:
“Improving work environment and interpersonal relations with clients and partners, in 1 year”
- Scope:
“A 10-hour training course for 10 staff members to learn how to constructively communicate (expressing the expectations) and active listening”
- Stakeholders:
 - Alfa’s trained staff
 - Alfa’s whole team

- Partners
- Clients

C.3 Circular economy Skills development

Research to reduce environmental footprint

- Goal:
 - “Enabling 100% of the organization’s technical staff, that is 15 people:
 - d) to get knowledgeable and able to consult on how to reduce an organization environmental impact
 - e) to reduce the 33% of individual ecological footprints at the workplace
 - f) to propose measures to cut the organization’s emissions and negative externalities”
- Scope:
 - “1 circular economy expert team hired for a 12-hour training”.
- Stakeholders:
 - Staff members
 - The organization
 - Local community
 - Environment

IMPACT MAP exemplified

Stage 1 <i>Who & how many?</i>	
STAKEHOLDER	
<i>Who does your activity affect?</i> <i>Who does your activity have an effect on?</i>	<i>How many</i> <i>in group?</i>
Participants in Digital Marketing Course	2
Participants in Relational Skills Training Course	10

Stage 2

2. MAPPING ACTIVITIES & COSTS

Stage 2 Summary

In this stage you will map, list and quantify all the activities that are carried out in the project in order to produce changes. That includes whatever is/will be produced within the project as a means to generate the intended changes. You will also track all costs of the project.

2.1 ACTIVITIES / OUTPUT

Which and how many activities have been carried out to produce the intended outcomes?

Outputs represent the quantitative summary of activities undertaken as investment and anything that is produced within the project assessed.

List the amount of activity produced and outputs generated.

Briefly describe each activity undertaken, such as workshops, seminars, mentorships, and on-the-job training.

For example, in a project to build entrepreneurial skills:

- 1 Business Plan course
- 1 Social skills course
- One-to-one mentorship to build the SEO staff's green competences

Quantify the activities, such as the number of participants trained, and/or the number of workshops conducted.

For example, in a project to build entrepreneurial skills:

- 1 business plan course, 20-hour duration for 10 people
- One-to-one executive mentorship, for 2 people, 5-hour per person

CASE STUDY examples:

ASSESSING 3 TRAINING PROGRAMS to EMPOWER SOCIAL WORKERS

C.1 Entrepreneurial Skills development

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- Goal:
"Increasing 25% the sales of services/products by 24 months".
- Output:
"2 staff members trained in a 20-hour Digital Marketing Course".

C.2 Soft Skills development

Relational skills training to build social and cultural capital

- Goal:
"Improving work environment and interpersonal relations with clients and partners in 1 year"
- Output:
"A 10-hour Social Skill training course for 10 staff SEO's members".

C.3 Circular economy Skills development

Research to reduce environmental footprint

- Goal: "Enabling 100% of the organization's technical staff, that is 15 people:

- a) to get knowledgeable and able to consult on how to reduce an organization environmental impact
- b) to reduce the 33% of individual ecological footprints at the workplace
- c) to propose measures to cut the organization’s emissions and negative externalities”
- Output: “1 circular economy expert team hired for a 12-hour training directed to 12 people”

2.2 COST / INPUT

What are the resources – money, time or others – invested to produce changes?

How much are the resources invested?

Input is the cost of all activities carried out within a given project, such as a training program. Calculate all the financial resources invested in the project, including:

- the amount of money spent directly to purchase services or products (*ex: cost of a training course*)
- other indirect costs (for example, if the course takes place in a conference room that you hire or that you borrow but need to be prepared before the course and cleaned after, then you include the cleaning costs etc)
- the time invested by the people who carried out tasks, estimating the value of their time, when needed. If you use volunteers to carry out the activity, you include the value of their time per hour although they are not paid in money as salary: external people that aren’t paid but whose time and effort have a value are included.

For example, in a project to build entrepreneurial skills:

-1 Course to learn how to promote the SEO’s services and products: 6.000€

-1 Course to develop relational skills: 4.000€

-Personal mentorship to develop green competences: 5.000€

-Cost of trained people time: free (all trained people are SEO’s staff)

Total cost / INPUT = 15.000€

CASE STUDY examples:

ASSESSING 3 TRAINING PROGRAMS to EMPOWER SOCIAL WORKERS

C.1 Entrepreneurial Skills development

Digital marketing & storytelling Course

- Goal: “Increasing 25% the sales of services/products by 24 months”.
- Output: “2 staff members trained in a 20-hour Digital Marketing Course”.
- Input/Cost: “6.000€” (=20-hour Digital Marketing course)

C.2 Soft Skills development

Relational skills training to build social and cultural capital

- Goal: “Improving work environment & interpersonal relations with clients & partners in 1 year”
- Output: “A 10-hour Social Skill training course for 10 staff SEO’s members”
- Input/ Cost: “4.000€” (= 10-hour Social Skills course)

C.3 Circular economy Skills development

Research to reduce environmental footprint

- Goal: “Enabling 100% of the organization’s technical staff, that is 15 people:
 - a) to get knowledgeable and able to consult on how to reduce an organization environmental impact
 - b) to reduce the 33% of individual ecological footprints at the workplace
 - c) to propose measures to cut the organization’s emissions and negative externalities”
- Output: “1 circular economy expert team hired for a 12-hour training directed to 12 people”
- Input / Cost: 5.000€ (= Circular Economy Expert 12-hour fee)

IMPACT MAP exemplified

Stage 1 <i>Who & how many?</i>		Stage 2 <i>What changes? At what cost?</i>			
STAKEHOLDER		CHANGES	INPUT / COSTS		OUTPUTS
<i>Who does our activity affect or has an effect on?</i>	<i>How many in group?</i>	<i>What changes for each stakeholder?</i>	<i>What do they invest?</i>	<i>Value in €</i>	<i>Summary of activity in numbers</i>
Alfa SE	1	Alfa improves its staff’s ability to sell services	Cost of Digital Marketing Training Course	6.000€	1 Digital Marketing Training Course, 20 hours
		Alfa’s work environment improves as a result Alfa’s staff increased skills to relate and accommodate each other	Cost of Relational Skills Training Course	4.000€	1 Relational Skills Training Course, 10 hours
Participants in Digital Marketing Course	2	Participants learn the fundamentals skills to market services and products	Time	-	1 Digital Marketing Training Course, 20 hours
Participants in Relational Skills Course	10	Participants develop their social skills as listening and communication skills, ability to build rapport and manage diverse views and conflicts	Time	-	1 Relational Skills Training Course, 10 hours

Stage 3

Stage 3 Summary

In this crucial phase, you will map all the changes/outcomes produced by the project. You will consult stakeholders so to comprehend all main outcomes from anyone's experience.

You will find appropriate ways to measure each change by adopting indicators.

You will also discover the financial value of your social and environmental outcomes, through the use or the creation of financial proxies, a way to assign a monetary value to something that may not have a price in the market (ex: increase of self-confidence as a worker).

3. OUTCOMES: EVIDENCING CHANGES and their VALUE

What will change/what has changed due to the activity?

Outcomes are the effects and the impacts arising from the assessed activity.

All outcomes need to be mapped- stakeholder by stakeholder.

Stakeholders' consultation often helps identifying outcomes unobserved and not mapped.

Outcomes are measured on the ground, getting their value from each stakeholders' perspective by interviewing them and giving them voice. That is an essential condition and quality of SROI where the value emerged is not top-down established by the assessing practitioners through back-office calculations.

3.1 MAPPING OUTCOMES

Identify and list the outcomes of your training for each stakeholder:

Include direct short-term outcomes, as well as medium-term and long-term intended and unintended outcomes, if they are caused mainly by your investment.

For example: if you organize a Digital Marketing Training Course for your staff, one not immediate outcome may be "improved organization's visibility through new marketing initiatives online". Such outcome – obtaining more visibility - is not direct as it is "improved staff's ability to market an organization's services". Nevertheless, it can be included if the outcome - higher visibility - results from the activity assessed – the training course and the skills gained there. In a further phase, you could reduce its causation, through the factors of deadweight, attribution and drop-off explained below.

Example of Outcomes of a business plan training

Stakeholder 1: Training Participants (2 people)

Short-term

-Acquired ability to draft business plans (direct)

Medium-term

- Acquired ability to manage an entrepreneurial project (indirect)
- Higher motivation to be in charge of business management tasks (indirect)
- Increased employability (indirect)

Long-term:

- Enhanced ability to contribute to business performance (direct)

Stakeholder 2: Alfa organization (that funds the training for his staff participants)

Short-term

- Reduced expenditure of hiring external consultants on business plans (direct)
- Increased work efficiency in business management (indirect)

Medium-term

- Enhanced social enterprise business performance (direct)

3.2 CONSULTING STAKEHOLDERS

3.2.1

Select the key stakeholders

Training programs have both direct and indirect effects on several groups of people, called stakeholders.

List all the main stakeholders affected.

For example: a staff's training to improve their listening and communication skills with clients may easily positively affect the staff's family members & people closely related to the participants: increased social-emotional skills, reflect not only within the work team or towards clients. Therefore, case by case, you will choose which impacts on which stakeholders estimate according to their relevance for your assessment. In this example, if you are estimating the outcomes produced at the workplace, the stakeholder "Family of trained staff" is likely to be out of scope. But you aim at assessing the change in well-being of trained staff, then the same stakeholder "family of trained staff" becomes relevant and within your scope.

Example of Outcomes of a social skills training

Stakeholder 1: Training Participants

- Acquired ability to actively listen
- Acquired ability to communicate own's expectations
- Ability to manage better difficult relations
- Increased self-confidence

Stakeholder 2: Alfa SEO (the organization funding their staff's training)

- Improved performance due to better relations and cooperation within the team
- Reduced sick leaves due to stress and emotional issues

Stakeholder 3: Clients of Alfa SEO

- Improved satisfaction
- Higher fidelity

Note: some outcomes cannot entirely be attributed to the training assessed. For example, Alfa clients' higher satisfaction, which may partly be due to external causes ("attribution") or may have occurred even without the training ("deadweight)". You will use the factors of causation such as attribution and deadweight further on, in order to avoid over-claiming.

3.2.2

How to consult stakeholders

In reference to the activity assessed – such as a training program- find out what are the stakeholders' goals and expectations ("What would you like to achieve from the training?" "How much was achieved?" "On a scale from 1 to 5, how much did this training contribute to your learning of...?") as well as their concerns ("What within the training program was not included that you consider very important in order to...?").

a) In presence data collection

Whenever feasible, do *in-person meetings* to interview stakeholders: the physical presence and direct dialogue help gather more accurate information and qualitative data. By listening to grasping nuances about their perspective, how they value the training, more than through sent questionnaire to be filled online or on paper.

In presence meetings can be:

- *One-to-one interviews*: the best options for qualitative data, beyond quantitative data. The most time-consuming option at the same time.
- *Focus groups*: group meeting where both written questions can be given and a time for discussing qualitative data information.
- Written questionnaires and oral feedback: you can also adopt a combined approach, administering written questionnaires to obtain precise quantitative data (see Likert scale's use) and afterwards to take enough time to listen to feedback from the people involved.

b) Remote data collection

- *Online surveys, or questionnaires*:

They are affective to get quantitative data through closed questions

(Example: *how useful was this course to learn raise fund for our organization?*)

Useless – Almost useless – Neither useless nor useful – useful – very useful)

Online tools can be used also to acquire some qualitative data through open questions.

(Example: *"what has been most useful in this training?"*)

"What did you especially appreciate?")

Questions sent via email or answered in online surveys - also using through specific tools (ex: SurveyMonkey) that analyse all the answers and prepare the statistic graphs - are time-efficient for large groups of respondents.

However, written answers are prone to bias interpretations and may not convey all the nuances as the respondent actually has them in mind. To gather qualitative data remote data collection will never be as effective as in presence dialogue and interaction where all gestures, nuances and emotions are perceived and collected by you.

When using not in-presence tools, the most accurate method consists in combining them with in-presence (or video-call one-to-one) interviews to people who - due to their role, knowledge or experience - supposedly have a special knowledge of particular relevance or interest (so called “privileged stakeholders”).

3.2.3

When to engage stakeholder

To measure change, you have to consult stakeholder at least 2 times: before the activity and after the activity carried out or to be carried out. This is a sine qua non for your assessment. In fact your first stakeholders’ consultation before carrying out the activity is the baseline that allows you to understand the change brought about by the activity.

You need to ask stakeholders the same question twice:

- *1st time*: before the training / project / activity (so-called “time zero” or “T0”)
- *2nd time*: after the training / project / activity (so-called “time one” or “T1”)

Example: “On a scale from 1 to 5, how would you assess your capacity to market the organization activities?”

Only by posing exactly the same question 2 times, the change produced by our activity can be actually estimated. Otherwise you lack the point of reference

As shown in the example in the table below, questions need to be quantifiable / measurable.

Please note:

No outcome can be assessed with accuracy without defining the initial state of every stakeholder.

The initial state or starting situation, from the perspective of each stakeholder, before the project begins needs to be assessed.

(For example, before starting a digital marketing course:

“How would you assess your digital marketing skills from 1 to 7?”

The very same question – equally phrased with no whatsoever changes - needs to be posed after the digital marketing course)

A change cannot be estimated in a measurable way only afterwards.

(For example: “my sales ability is “much improved compared to before the training”

Or even “On a scale from 1 to 7, my sales skills are grown from 1 to 5”).

To this end, there different ways to pose measurable questions.

You can use “Likert scales” to formulate questions leading to quantifiable answers, before and after your training program. The table below shows some Likert scales:

Satisfaction	Likelihood	Level of concern
1. Very dissatisfied 2. Dissatisfied 3. Neither dissatisfied or satisfied 4. Satisfied 5. Very satisfied	1. Very unlikely 2. Unlikely 3. Neutral 4. Likely 5. Very likely	1. Very unconcerned 2. Unconcerned 3. Neutral 4. Concerned 5. Very concerned

Agreement	Frequency	Awareness
1. Strongly disagree 2. Disagree 3. Neither agree or disagree 4. Agree 5. Strongly agree	1. Never 2. Rarely 3. Sometimes 4. Often 5. Always	1. Very unaware 2. Unaware 3. Neither aware or unaware 4. aware 5. Very aware

Familiarity	Quality	Importance
1. Very unfamiliar 2. Unfamiliar 3. Somewhat familiar 4. Familiar 5. Very familiar	1. Very poor 2. Poor 3. Acceptable 4. Good 5. Very good	1. Very unimportant 2. Unimportant 3. Neutral 4. Important 5. Very important

3.3 INDICATORS

The importance of good indicators

Everything you cherish in life, your mind has evaluated it, whether you did it consciously and you are aware of it or not.

What we value is what we have assessed. Therefore it is crucial to find precise standards of measurement that indicate with objectivity and equanimity what changes occurred and how much change occurred caused by the assessed activity.

3.3.1 Indicator’s description

How would you measure the change?

Use indicators to measure the outcomes and all changes occurred.

What gets measured is what gets prioritised: finding the right set of indicators is therefore a crucial part of your assessment process. What is not included and measured is implicitly unvalued: be sure to have included any change that matters within your goals and scope of analysis.

You can find online indicators, using key words such as “professional training KPIs”, “increased professional knowledge KPIs”, “professional growth/development indicators” and similar. Another and better option is to think what has changed due to the activities assessed and how could you measure the changes: you create your own indicators, using words that reflect every change that your stakeholders experienced, every relevant outcome of the activities carried out or to be carry out.

Each indicator needs to be single-pointed: it must describe only and no more than 1 change.

The most precise, the most accurate.

For example, if you measure the level of professional growth after a Digital Marketing Course, you need to know the perception of the trained individuals, since only they can tell how much they actually learned.

One indicator can therefore be: “Perceived professional growth in digital marketing skills after the training”. You’d better be – as we suggest -more specific, pinpointing the diverse specific digital marketing skills whose change you want to estimate.

For example:

In a scale from 1 to 5, where 1 = nothing, 2 = a little; 3 = acceptable amount, 4 = a lot, 5 = a lot and very well, how much did you learned it reference to:

DIGITAL MARKETING SKILL	Nothing	A Little	Acceptable amount	A good amount	A very good amount
Increased ability to generate appeal of services/goods, through digital advertising					
Improved ability to engage people in social networks					
Higher skills to prepare an attractive layout for posts and websites					
Gained knowledge on how to select the people/ organizations to target					
Etc.					

Or

In a scale from 1 to 5, where 1 = nothing, 2 = a little; 3 = acceptable, 4 = a lot, 5 = a lot and very well how satisfied are you of your learning in reference to:

DIGITAL MARKETING SKILL	Very dissatisfied	Dissatisfied	Neither dissatisfied nor satisfied	Satisfied	Very satisfied
Increased ability to generate appeal of services/goods, through digital advertising					
Improved ability to engage people in social networks					
Higher skills to prepare an attractive layout for posts and websites					
Gained knowledge on how to select the people/ organizations to target					
Etc.					

The [impact map](#) is your tool to write down your set of indicators chosen.

Note that matching indicators to outcomes may sometimes be easy and other times difficult: asking participants what changes they went through or they foresee they will go through, as well as brainstorming within your team about all possible outcomes, will help you identify the most accurate indicators to estimate changes.

Some examples of indicators to measure changes in terms to professional skills' growth

Entrepreneurial skills

- Increased capacity to sell products or services
- Improved ability to market the organization's activity
- Enhanced know-how on how to boost an organization's visibility
- Increased know-how on how to reduce a company environmental impact
- More autonomy to carry outtask

Relational skills

- Improved ability to ask and listen
- Better capacity to manage conflicts
- Improved skills to communicate in public

Emotional skills

- Increased ability to cope with stress
- Improved ability to deal with unexpected unwelcomed situations
- Increased self-confidence in own's ability to....

Indicators for changes of social enterprises and organizations

- Increased supportive relationships
- Increased sense of belonging to the organization
- Increased staff motivation
- Increased emotional well-being / staff's satisfaction at the workplace

Circular Economy indicators for organizations and their staff

- Higher understanding of impacts of products and services used
- Increased attention to sustainability of services/goods when carrying out purchases
- Ability to measure an organization's ecological footprint
- Ability to plan how to reduce impact of services/goods purchased
- Capacity to select environmentally friendly services
- Skills to consult on environmental impact in relation to organizations
- Gained basic knowledge about Life Cycle Assessment
- Skills to communicate and promote sustainability
- Higher sense of connection with nature through appreciation of ecosystems services

3.3.2 Quantity of change produced

How much change was /is there?

Each indicator needs to be quantified in numbers:

- The number of people experiencing the change

Generally it is based on stakeholders' answers to our questionnaires.

For example, if out of 12 people participating to the Social Skill Course, the change in terms of “Increased self-esteem”, after interviewing them, 3 people state that their self-esteem didn’t increase at all due to the course, the measurement of the amount of change applies only to 9 people.

- The amount of change per person and per stakeholder

Calculate the average amount of change experienced per person in each stakeholder group. For example, for improved skills, you can estimate improved performance by quantified metrics.

- A factual quantity / amount

For example, “30 more tasks completed” (in 1 year by the 15 people trained, in comparison to the yearly number of completed projects by those 15 people the previous year).

3.3.3 Source of data collection

Where did you get the information from?

Indicate how you gathered every stakeholder’s feedback about the changes they experienced. Which tools will you use, or have you used:

- Personal interviews
- Group meetings / focus groups in presence
- Emailed questionnaires or online surveys (*ex: change of perceived ability to draft a business plan*)
- Internal data (*ex: yearly income growth*)

Data analysis, observations and evidence, both as quantitative changes (e.g., number of services sold per year) and qualitative data (e.g., personal testimonials) are important.

That allows to understand and be transparent about the process by which we do our measurements.

3.3.4 Outcome Duration

How long will the change last?

Indicate how long you estimate that the change produced will last in years.

Generally the range of years is between 1 and 5. More than 5 years seems hard– with exceptions (for example the construction of a new building – to forecast intangible changes).

Note about the Net Present Value

You can refer to the official SROI guide (<https://www.socialvalueint.org/guide-to-sroi>) if you wish to calculate the Net Present Value for the outcomes lasting more than 1 year. For the purposes of the present guidelines, the calculation of the Net Present Value is excluded due to its greater complexity as well as it being controversial area, since discounting the projected value of benefits over time (the process by which future financial costs and benefits are recalculated to present-day) is said to encourage short-termism.

IMPACT MAP exemplified

STAKEHOLDER	Stage 3				
	Which outcomes? How to measure them? How many? How long?				
	(from above) OUTCOMES	INDICATOR	SOURCE	QUANTITY	DURATION
<i>Who does our activity affect or has an effect on?</i>	<i>How would you describe the change?</i>	<i>How would you measure the change?</i>	<i>Where did you get the information from?</i>	<i>How much change was there?</i>	<i>How many years does the change last?</i>
Participants in Digital Marketing Training Course (2 people)	Sense of professional growth as Digital Marketing Manager	Perceived professional growth after the training	Questionnaire	2 people (100% participants) state to have acquired proficiently marketing skills	1
Participants in Relational Skills Training Course (10 people)	Higher self-confidence	Perception of own's confidence when relating at the workplace	Questionnaire	5 people (50% participants)	1
	Higher skill to relate with people	Stated change in the average level of stress while working at Alfa	Questionnaire	4 people (40% participants)	1
	Increased focus resulting from a mind less drained by conflicts	Self-perception about change in own's ability to focus while carrying out professional tasks	Questionnaire	6 people (60% participants)	1

3.4 OUTCOME VALUATION

Financial Proxies

To determine the monetary value of social outcomes, you need to use approximations, called "proxies" that allow you to assign an equivalent financial value to changes lacking of a direct price in the market.

For instance, what is the value of increased staff's knowledge about the increase in income for the organization due to new fund-raising done thanks to new acquired skills.

- **Well-being Valuations:** estimating the value of increased mental well-being, such as job satisfaction, or self-confidence.

Each stakeholder who experiences some change knows best what they actually value this change: they can guide you to estimate what the change is worth to them.

If you check the proxy with stakeholders and find commonalities, evidencing the stringest agreements, your proxy gains credibility. Where there is disagreement on values, it is convenient to use average values, or it is possible that the outcomes are to be expressed differently than done.

In Google Scholar or online literature, you may find data through articles or research that has already used the proxy appropriate to your project, having assigned a monetary value to the outcome you are interested in.

Stage 3					
Outcomes: what changes					
<i>(from above)</i> STAKE HOLDER	<i>(from above)</i> OUTCOMES	INDICATOR	FINANCIAL PROXY	VALUE in €	SOURCE
<i>Groups of people that change as a result of the activity</i>	<i>How would you describe the change?</i>	<i>How would you measure the change?</i>	<i>What equivalent value/proxy would you use to value the change? What is an appropriate financial benchmark to be used?</i>	<i>What is the value of the change?</i>	<i>Where did you get the information from?</i>
Participants in Digital Marketing Training Course	Sense of professional growth	Perceived professional growth after the training	Cost of professional training Or Difference between income of lower /higher professional education	1.500€ per person 150€/month	(to be identified in the country being evaluated, in the year closest to the present year)
Participants in Relational Skills	Higher business self-confidence	Perception of own's confidence when relating at the workplace	Cost of self-esteem course (per person) Or Value of a 1-point rise (on 10 point scale) in job satisfaction (£4,618/ €5.500)	€550 -	https://socialvalueuk.org/wp-content/uploads/2022/04/NCU-SROI-report-final-version-200422.pdf Helliwell and Huang, 2005
	Higher resilience to team's	Stated change in own's ability to let go of			

Training Course	conflicts, as <i>ability to accommodate</i> people	irritation and maintain functional professional relations	Cost of a course of conflict management	-	(to be identified in the country being evaluated, in the year closest to the present year)
	Reduced stress at the workplace	Stated change in the average level of stress while working at Alfa	Cost per person of 10 sessions of relational therapy	600€/person	HACT Social Value Bank (SP01407): http://www.hact.org.uk/value-calculator
	Increased <i>mental focus</i> resulting from a mind less drained by conflicts	Self-perception about change in own's ability to focus while carrying out professional tasks	Cost of a personal trainer to develop mental focus	390€ / person	https://www.psymedisport.net

Stage 4

4. ESTABLISHING IMPACT

In order to avoid overclaiming outcomes, you will make sure not to take full credit for the changes occurred and the results achieved, by checking the relation cause-effect between the outcomes obtained and the training activity.

This counterfactual analysis is to be done outcome by outcome
It ensures that what we value is rigorously linked to the activity / training / project assessed, that the change would not even happened even without our training, and that outcomes are due to the training and not to other causes.

The counterfactual analysis' main elements to be weighed are.

4.1 DEADWEIGHT

In what measure would the outcome happen / have happened anyway, without the activity?
Deadweight is a percentage of the amount of outcome that would have happened even if the activity had not taken place.

To avoid overestimating the impact, analyse outcome by outcome if and in what measure it would have occurred even without the training program, or the activity assessed.

Check how much the affected people would have changed even without the activity carried out.

To this end, you can ask stakeholders if they learned the same topics or accessed to similar services from other sources and how useful (from 0% to 100%) were to bring about the change they experienced.

As deadweight increases, your contribution to the outcome decreases.

Every time you apply a percentage (0%; 10%; 30% etc) of deadweight to ach outcome, you need to report (see chapter "Reporting") the reasoning that brought you to establish that percentage.

For example: in relation to the outcome "increased employability" after the training for the "Participants in Digital Marketing Training Course" you realise after asking them that, even without the course, they would have learned an average of 1/5 of what they learned at the training by daily work practice. In this case, if the average of answers is 20% of learning anyway with no training, you will apply a 20% (= 1/5) deadweight to this outcome. You will report: "according to the average of participants' answers, they would have learned 20% anyway".

When you interview many people, you have to calculate and apply the average of their answers: if out of 2 participants, 1 person said "I would have learned any way 10%"and the other states ""I would have learned any way 30%", then you apply the average of 20%.

Deadweight exemplified

"How likely was for each stakeholder group that the mapped changes would have occurred if participants had not been attending Alfa training?"

"How likely was Alfa SE to attain the same outcomes without training its staff?"

If out of 4 new business partnerships created in the last year, 3 of them (75%) would have occurred even without the new Alfa visibility initiatives, then you apply 75% of deadweight to this outcome.

ATTRIBUTION

Is this outcome due to contribution of third subjects, other than the activity assessed?

Attribution is your assessment of how much of the outcome was caused by the contribution of other organisations or people.

Here you determine the extent to which the training program contributed to the outcomes compared to other people or organizations who may have also contributed to the attainment of the same outcome.

As attribution increases, the activity’s contribution to the outcome decreases.

To do that, ask stakeholders what percentage of the outcome is the result of your training and which outcome (ex: learning how to raise funding) results from other sources of learning.

Attribution exemplified

If 1 person – John Smith – out of the 2 digital marketing trained people is also learning at home from her partner who is a digital marketing expert, we need to ask John “In comparison to other contributing factors, how much of the digital marketing learning that you are using at Alfa SE was caused by Alfa’s training program in a scale from 0% to 100%?” if the answer is 60% compared to 40% from his partner, then we apply 40% of attribution. If the answer was “100% due to Alfa’s training” then we apply 0% of attribution.

DROP-OFF

Does the outcome drop-off in future years?

Drop-off is the weakening of an outcome over time.

It needs to be used when you assess the amount of value produced in more than 1 year.

In this case, you account for the decline in benefits over time.

Drop-off exemplified

The outcome “Higher sense of belonging to one’s organization” is an emotional state, therefore by its nature likely to change significantly over time. In we estimate that half of the sense of belonging to an organization will be gone after 1 year from the event that triggered it, then we apply a drop-off of 50%.

Instead “Acquired fundamental marketing skills” is an outcome that is unlikely to deteriorate over time, especially for professionals that use the acquired skills consistently. In this case the drop-off may be 0%.

Please note

For the sake of simplifying these basic guidelines, we didn’t introduce the calculation of drop-off. That would imply also learning how to calculate the Net Present Value.

The Total Present Value of Benefits is a process where we are discounting future values to present values using an appropriate discount rate (generally 3% per year). It is a usual – although still quite controversial calculation, by which future financial costs and benefits are recalculated to present-day values. It is based on an assumption: people generally prefer to receive money today rather than tomorrow because to avoid the risk that the money won't be paid or for the potential gains resulting from investing the money or being able to spend them right now.

We suggest that, even if you do not calculate the Net Present Value and omit the Drop-off, you estimate the duration of each outcome.

That allows to carry out a more accurate assessment, since, some outcomes (mainly emotional) are meant to fade away over time (ex: sense of belonging to an organization: clients' faithfulness; motivation to work) while other outcomes (mainly cognitive or empirical) are meant not to weaken much over time (ex: learning how to use a program/software; knowledge to design a business plan, etc.).

Stage 4

4. CALCULATING the VALUE

Impact calculation is the total quantified value of each change.

Impact calculation is the total quantified value of each change generated by the training, divided by the total cost of the investment:

You calculate the value impact for each outcome as follows:

Financial proxy is multiplied by the quantity of the outcome (for example the number of trained people that, upon interview or questionnaire, state to have obtained the outcome you are measuring)
This gives you a total value.

From this total, you deduct any percentages for deadweight or attribution.

You repeat this calculation for each outcome to arrive at the value of the impact:

That means the calculation is done in each row of the impact map (see map below).

The total impact is the sum of these individual calculations.

You add up the total value to arrive at the overall value of positive impact of all outcomes included.

The SROI cost-benefit analysis is finalised when you divide the total amount of positive outcomes calculated by the total cost of investment (money and/or financial value of time spent) using the following formula:

$$\text{SIA} = \frac{\text{Total Value of Positive Outcomes (as estimated through proxies)}}{\text{Total Cost of Investment}}$$

Total Value of Investment (costs)

Impact calculation summed-up

Impact is calculated by applying the following equation:
 Financial proxy X quantity of the outcome X fraction of the change remaining after deadweight and attribution have been removed.

VALUE CALCULATION Exemplified

Stage 1	Stage 2		Stage 3			Stage 4			
STAKE HOLDER	OUTPUT	INPUT	OUTCOME	QUANTITY	OUTCOME VALUATION	Impact before deadw. & attribution	DEAD WEIGHT	ATTRIBUTION	IMPACT
Participants in Relational Skills Course (10 people)	1 Relational Skills Training Course, 10 hours	(Time during paid working hours: free)	Higher self-confidence	5 out of 10 (stating an increase of self-confidence)	Value of higher confidence in relationships: Cost of self-esteem course €550/ person	550€ X 5 people = 2.750€	20% (due to other life experiences)	20% (due to more trust received at home)	1.650€
			Higher ability to handle conflicts	6 out of 10 (stated an increase of conflict resolution skills)	Value of a course of conflict management per person 200€	200€ X 6 people = 1.200€	0%	50%	600€
			Higher ability to relate with people	4 out of 10 (Declared Increased skills to relate)	Value of reduced stress: cost of 10 sessions of relational therapy per person = 600€/ person	600€ x 4 people = 2.400€	15% (due to own new know-how)	25% (due to yoga / sport activities)	1.440€
			Increased focus resulting from emotional draining due to conflicts	6 out of 10 (Declared Increased ability to concentrate)	Value of a personal trainer to develop mental focus 390€ / person	390€ x 6 people = 2.340€	20% (less busy working year)	0%	1.872€
	Alfa SE	1 Relational Skills Training Course, 10 hours	6.000€	Increased individual performance resulting from higher motivation	6 out of 10 affirmed completing more tasks for higher motivation	Value of 12 additional tasks completed by 6 staff in comparison to previous year	Average value of 1 task 150€ x 12 tasks = 1.800€	20% (less busy working year)	10% (Colleagues help)
New partnerships									

			arising from better relational skills leading to new networking initiatives	1	Value of the new partnership created with Beta	Value of project started with Beta = 6.000€	0%	0%	6.000€
			Increased sense of belonging to Alfa for all staff	8 (out of 10)	Value of increased sense of belonging per person	4.360€ X 8 = 34.880€	0%	50% (new nice, motivated staff employed)	17.440€
TOTAL IMPACT VALUE of Relational Skills Training (1st year)									30.262€

Total Value of Outcomes = 30.262€

SROI ratio = _____ = 5,04 (1st year)

Total Value of Investment = 6.000€

Stage 5

4. REPORTING

Reporting is your story of the changes occurred to people due to the activity assessed. Reporting can be simple but needs to be enough complete of information for anyone to be enabled to track anytime all the project’s relevant data and the reasoning done to assess the outcomes and their value.

The Reporting structure can follow the Impact Map scheme:

- First you define the *goals* and *scope* of the training.
- You list all the *activities* that will generate or have generated changes. You calculate their costs
- You define and map all the affected groups of people
- You describe your *findings*: you map all the *changes/outcomes* produced by the training activities for all stakeholders. Here you report how you consulted the stakeholders and their answers (the average value of each answers) to estimate the quantity and quality of change experienced in their perspective. You calculate the quantity of outcome for the number of people the stated to have improved something due to the project’s activity. Present your findings differentiating with honesty what you assumed (assumptions) from facts and objective/quantitative data.
- Your calculations about the sum of costs and the benefits of the outcomes for the number of people that confirmed to have benefitted. You describe all the limitations of the calculation and in general of the assessment (ex: lack of time to carry out a given task; lack of resources to finalize something etc..)
- Transparent conclusions and suggestions to improve a similar assessment.



Show the limitations of the assessment process that you experienced and what can be improved. Make recommendations and suggest next steps when needed.

When assessing, our goal is not to brag about achievements but to estimate with transparency how a given activity like an organization's training, may produce intended positive as well as unintended negative results, identifying the diverse challenges faced and the unforeseen obstacles encountered, so that yourself in the future and any other reader may find insights and learn what to repeat and what to avoid in similar projects.

Consider including both quantitative and qualitative information such as:

- Information relating to the goals and scope of your assessment: everything depends on that
- Description of the assessment and data collection processes, such as details about how you decide to include or exclude certain stakeholders, the stakeholder engagement, methods of data collection and limitations on your analysis.
- The impact map with indicators and proxies, and the reasoning made to identify the most accurate ones.
- Details of the calculations in reference to doubts of estimations (proxies) and assumptions.
- Any particular findings and detail that can work as an insight to improve the outcomes of this or future trainings.

Use a simple language and examples to improve clarity.

Include annexes that may describe better and in more details any part of your assessment. For example the text of the questionnaires or interviews that you used to quantify the changes produced on each stakeholder.

Whenever possible, re-engage stakeholders to validate your findings and to gather feedback for more accurate data or improvements.

Most of all, use the insights from your analysis to improve future training programs and decision-making processes.

SWEET IMPACT MAP

SWEET IMPACT MAP – Goals, Scope & general information

SROI Third Sector / Social enterprises Training Outcomes Assessment Impact Map			
Organization	Alfa SE	Name & Date	John Smith, 1 st of March 2025
Goals of the project	Increasing Alfa staff's entrepreneurial, social and circular economy competences		
Goals of assessment	Estimating the value of training for the organization and Alfa's main stakeholders		
Scope	3 Training Programs: on Marketing, on Relational Skills, on Circular Economy	Time period	2024-2025
Forecast or Evaluation	Evaluation ex-post		

SWEET IMPACT MAP – Stage 1 & 2

Stage 1 <i>Who & how many?</i>		Stage 2 <i>What changes? At what cost?</i>			Stage 3 <i>Which outcomes?</i>	
STAKEHOLDER		CHANGES	INPUT / COSTS		OUTPUTS	OUTCOMES
<i>Who does our activity affect or have an effect on?</i>	<i>How many in group?</i>	<i>What changes for each stakeholder?</i>	<i>What do they invest?</i>	<i>Value in €</i>	<i>Summary of activity in numbers</i>	<i>How would you describe every main change?</i>
Alfa SE	1	Alfa is able to sell better and more services than previous years	Cost of Digital Marketing Training Course	6.000€	1 Digital Marketing Training Course, 20 hours	Increased sales Higher visibility
		Alfa's work environment / staff motivation to work at Alfa improves	Cost of Relational Skills Training Course	4.000€	1 Relational Skills Training Course, 10 hours	Increased individual performance resulting from to higher staff motivation New partnerships arising from more external relations initiatives and better relational skills Increased sense of belonging to Alfa for all staff
		Alfa's purchase choices become more environmentally friendly, with lower footprint & increased energy saving	Cost of Circular Economy Training	5.000€	1 Circular economy training program with hired trainer, 12 hours	Reduced organization's travels by flight Reduced energy bills
Participants in		Participants learn the fundamentals skills to				Higher employability

Digital Marketing Course	2	market services and products	Time	-	1 Digital Marketing Training Course, 20 hours	Sense of professional growth as Digital Marketing Manager
Participants in Relational Skills Course	10	Participants develop their relational skills including listening, communication skills, building rapport and handling conflicts	Time	-	1 Relational Skills Training Course, 10 hours	Higher self-confidence
						Higher resilience to conflicts
						Higher skill to relate with people
						Gained focus resulting from a mind less drained by conflicts
Staff trained by Circular Economy adviser	15	Participants acquire environmental awareness of the value of ecosystem services; they learn about impact of consuming patterns and how to reduce ecological footprint	Time	-	1 Circular economy training program with hired trainer, 12 hours	Higher sense of connection with nature
						Saved energy consumption in their house and reduced consumerism
						Increased capacity to work on sustainability

SWEET IMPACT MAP – Stage 3

STAKEHOLDER <small>(from above)</small>	Stage 3 Which outcomes? How to measure them? How many? How long?				
	<small>(from above)</small> OUTCOMES	INDICATOR	SOURCE	QUANTITY	DURATION
<i>Who does our activity affect or has an effect on?</i>	<i>How would you describe the change?</i>	<i>How would you measure the change?</i>	<i>Where did you get the information from?</i>	<i>How much change was there?</i>	<i>How many years will change last?</i>
Alfa SE <small>(1 organization)</small>	Increased sales	Yearly difference of quantity of services sold in €	Annual Financial Report data	2 more projects than previous year	2
	Higher visibility	Number of new clients reached through marketing activities	Intranet data	1 new partnership	1
	Increased individual performance due to higher motivation	Yearly average number of tasks completed by staff	Annual Internal Report data	30 more tasks completed by 15 people	1
	New partnerships arising from better relational skills	Number of new partnerships per year	Internal data	2 new partnerships	3

	Increased sense of belonging to Alfa by its staff	% of staff with increased sense of belonging to Alfa	Staff interviews	65% of staff (9 people) state to feel a stronger sense of belonging	3
	Reduced organization's yearly travels by flight	Year expenditure for flights and hotels	Internal accounting	10 flights avoided per year	1
	Reduced energy bills	Yearly difference of expenditure in Alfa premises for energy and purchases	Internal accounting	20% energy saved	1
Participants in Digital Marketing Training Course (2 people)	Higher employability	Professional training course to develop Marketing skills			3
	Sense of professional growth as Digital Marketing Manager	Perceived professional growth after the training	Questionnaire	2 people (100% participants)	1
Participants in Relational Skills Training Course (10 people)	Higher self-confidence	Perception of own's confidence when relating at the workplace	Questionnaire	5 people (50% participants)	1
	Higher resilience to conflicts	Stated change in own's ability to let go of irritation and maintain functional professional relations	Questionnaire	6 people (60% participants)	1
	Higher skill to relate with people	Stated change in the average level of stress while working at Alfa	Questionnaire	4 people (40% participants)	1
	Increased focus resulting from a mind less drained by conflicts	Self-perception about change in own's ability to focus while carrying out professional tasks	Questionnaire	6 people (60% participants)	1
Staff trained by the Circular Economy Adviser (15 people)	Higher sense of connection with nature	Improved attention to nature's benefits for oneself	Questionnaire	12 people (75% participants)	1
	Saved energy consumption in own house and reduced consumerism	Reduced cost of own's energy bills	Interview		1
	Increased capacity to work on sustainability	Improved knowledge on daily environmental externalities in people choices of purchase	Test/ Survey	9 people (60% of participants)	3

SWEET IMPACT MAP – Stage 3

Stage 3 Outcomes: what changes					
<i>(from above)</i> STAKE HOLDER	<i>(from above)</i> OUTCOMES	INDICATOR	FINANCIAL PROXY	VALUE in €	SOURCE
<i>Groups of people that change as a result of the activity</i>	<i>How would you describe the change?</i>	<i>How would you measure the change?</i>	<i>What equivalent value/proxy would you use to value the change? What is an appropriate financial benchmark to be used?</i>	<i>What is the value of the change?</i>	<i>Where did you get the information from?</i>
Alfa SE	Increased sales	Yearly difference of quantity of services sold in €	N/A (this is a direct financial value, needs not a financial proxy)	15.000€	N/A -
	Higher visibility	Number of new clients reached through marketing activities	Yearly financial benefit arising from new clients in Alfa's area of work acquired through new marketing actions	No direct financial benefits found	-
	Increased individual performance due to higher motivation	Yearly average number of tasks completed by staff	Financial value of the sum of additional tasks completed due to higher performance skills	550€	Alfa internal accounting
	New partnerships arising from better relational skills	Number of new partnerships per year	Value provided by the partnership created	1 new project obtained thanks to the new partnership: 2.500€	Alfa accounting
	Increased sense of belonging to Alfa by its staff	% of staff stating an increased sense of belonging to Alfa	UK value of gained sense of belonging to a neighbourhood per person	4.360€	https://socialvalueuk.org/wp-content/uploads/2022/03/OVO-Foundation-SROI-Report-Composite.pdf
	Reduced organization's travels by flight	Yearly expenditure for flights and hotels	N/A (money saved to be calculated, not need of financial proxy)	-	Alfa SE year financial accounting
		Yearly difference of expenditure in Alfa	N/A	-	Alfa SE year financial accounting

	Reduced energy bills	premises for energy and purchases	(money saved to be calculated, not need of financial proxy)		
Participants in Digital Marketing Training Course	Higher employability	Professional training course to develop Marketing skills	Average yearly cost of professional training per person	€1.300	https://socialvalueuk.org/wp-content/uploads/2022/04/NCU-SROI-report-final-version-200422.pdf
	Sense of professional growth	Perceived professional growth after the training	Cost of professional training (to be sought by each staff's specific area of work)	-	(to be identified in the country being evaluated, in the year closest to the present year)
Participants in Relational Skills Training Course	Higher business <i>self-confidence</i>	Perception of own's confidence when relating at the workplace	Cost of self-esteem course (per person) Or Value of a 1-point rise (on 10 point scale) in job satisfaction (€4,618/ €5.500)	€550 -	https://socialvalueuk.org/wp-content/uploads/2022/04/NCU-SROI-report-final-version-200422.pdf Helliwell and Huang, 2005
	Higher <i>resilience</i> to team's conflicts, as <i>ability to accommodate</i> people	Stated change in own's ability to let go of irritation and maintain functional professional relations	Cost of a course of conflict management	€1.495/ person	https://www.ksl-training.co.uk/pdf/pricing/KSL-Our-Pricing.pdf (to be identified in your country, in closest year to the present one)
	Reduced stress at the workplace	Stated change in the average level of stress while working at Alfa	Cost per person of 10 sessions of relational therapy	600€/ person	HACT Social Value Bank (SP01407): http://www.hact.org.uk/value-calculator
	Increased <i>mental focus</i> resulting from a mind less drained by conflicts	Self-perception about change in own's ability to focus while carrying out professional tasks	Cost of a personal trainer to develop mental focus	390€ / person	https://www.psymedisport.net

Staff trained by the Circular Economy Adviser	Higher sense of connection with nature	Experience in nature that leads to a sense of closedness	Overall cost of a week outdoor camping for adults	950€	www.foresttoplate.com/wild-food-sweden
	Saved energy consumption in own house and reduced consumerism	Yearly amount of money saved in energy bills	N/A (a financial value to be directly calculated by each staff's person; it doesn't need a financial proxy)	-	N/A
	Increased capacity to work on sustainability	Value of basic sustainability consulting	Cost per person of a training on reducing ecological footprint Or Cost of own's time to study and learn how to reduce a group's ecological footprint	£80 €40 per hour	https://theoneplanetlife.com/courses/workshops-in-one-planet-development/ (Calculation to be based on gross annual salary divided per number of working hours)

SWEET IMPACT MAP – Stage 4

Stage 4 Establish impact					
STAKEHOLDERS	OUTCOME	DEADWEIGHT	ATTRIBUTION	DROP-OFF	IMPACT
<i>Groups of people that change as a result of the activity</i>	<i>How would you describe the change?</i>	<i>What would have happened anyway without the activity?</i>	<i>Who else contributed to the change?</i>	<i>Does the outcome drop off over the years?</i>	<i>Quantity times financial proxy, less deadweight, displacement and attribution</i>
Alfa SE	Increased sales	75%	33%	50%	
	Higher visibility	20%	30%	30%	
	Increased individual performance due to higher motivation	50%	0%	50%	
	New partnerships arising from better relational skills	0%	0%	10%	
	Increased sense of belonging to Alfa by its staff	30%	50%	75%	
	Reduced organization's travels by flight	10%	0%	0%	
	Reduced energy bills	0%	0%	0%	
Participants in Digital Marketing Training Course	Higher employability	20%	10%	10%	
	Sense of professional growth	10%	10%	75%	
	Higher business self-confidence	25%	10%	30%	

Participants in Relational Skills Training Course	Higher <i>resilience</i> to team's conflicts, as <i>ability to accommodate</i> people	0%	0%	10%	
	Reduced stress at the workplace	10%	10%	60%	
	Increased <i>mental focus</i> resulting from a mind less drained by conflicts	10%	10%	10%	
Staff trained by the Circular Economy Adviser	Higher sense of connection with nature	50%	50%	50%	
	Saved energy consumption in own house and reduced consumerism	30%	30%	25%	
	Increased capacity to work on sustainability	0%	0%	0%	