Social Innovation Ecosystem Impact Assessment Framework

WORKBOOK

Interreg Baltic Sea Region
Co-funded by the European Union
RESPONSIVE PUBLIC SERVICES RESIST
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RIGA TECHNICAL UNIVERSITY

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The framework is prepared as part of the project Regional Ecosystems for Social Innovation and Social Transformation (RESIST).

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PROJECT INFO

The Social Impact Assessment Framework was funded by the European Commission's Interreg Baltic Sea Region Programme.

In the project RESIST - Interreg Baltic Sea Region (Regional Ecosystems for Social Innovation and Social Transformation), regional authorities, business support organisations, and sectoral agencies are developing a model to open up existing regional innovation ecosystems for social innovators and social entrepreneurs tackling societal and environmental challenges.

Social innovators and social entrepreneurs can play an important role in finding creative and unconventional solutions to current transformative challenges such as migration, the transition to a carbon-neutral society, or digitisation. But to turn good ideas into practice, they need help in terms of qualification, funding and access to markets and cooperation partners. Regional public authorities, business support organisations and sectoral agencies in the Baltic Sea Region are already very effectively providing such support to mainstream innovators and entrepreneurs, but they have yet to realise the benefits of adapting their offers to the needs of social enterprises. The RESIST project supports these institutions in creating better and more supportive regional ecosystems for social innovation (SI) and social entrepreneurship (SE) and in making existing innovation support more accessible for social entrepreneurs.

The project partners explore the concept of "clusters of social and ecological innovation" (CSEI) as a model for fostering cross-sectoral collaboration, and they develop and test a programme to improve the capacity of innovation support actors to foster social innovation. In the long run, the objective is to raise the number of CSEIs in the BSR and to facilitate cooperation between them. Throughout the process, the involved regions will also collect ideas and recommendations for improving the integration of social innovation in their regional innovation strategies.

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OTHER SOLUTIONS DEVELOPED DURING THE RESIST PROJECT

Mission-Oriented Innovation Policy Guide

Textbook – Unlocking potential: How to make innovation social?

Toolbox – Unlocking potential: How to make innovation social?

TRAIN THE TRAINERS CAPACITY BUILDING MODULES

Train the Trainers Module 1: Capacity

Train the Trainers Module 2: Finances & Resources

Train the Trainers Module 3: Tech 4 Good & Digital Skills

Train the Trainers Module 4: Social Business Values & Impact

Train the Trainers Module 5: Social Business Modules

Train the Trainers Module 6: Social Business Culture

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INTRODUCTION

PURPOSE OF THIS WORKBOOK

The Social Innovation Ecosystem Impact Assessment Framework Workbook offers a practical, structured approach to help social innovation organizations measure and manage their impact.

DEVELOPED AS PART OF THE RESIST PROJECT, IT BUILDS ON A PRIOR LITERATURE REVIEW STUDY THAT CAN BE ACCESSED HERE: HTTPS://INTERREG-BALTIC.EU/PROJECT/RESIST/#OUTPUT-9.

Unlike many methods that focus only on financial or quantitative metrics, this workbook uses the Theory of Change to reflect the complexity of social transformation.

It provides step-by-step guidance on:

- designing an impact strategy
- defining measurable indicators
- embedding assessment into daily work

Accessible to organizations of all sizes, it helps decision-makers move beyond assumptions and ensure that impact is intentional, accountable, and responsive to real-world challenges.

WHO IS THIS WORKBOOK FOR

The Social Innovation Ecosystem Impact Assessment Framework workbook is designed for a diverse range of stakeholders. It serves as a tool for evaluating, and optimizing impact across different levels of the social innovation ecosystem.

(SOCIAL) INNOVATION CLUSTERS
This framework helps clusters, networks, and policy-driven initiatives assess their collective impact, improve strategy alignment, and strengthen collaboration between ecosystem actors.

(SOCIAL) INNOVATION SUPPORT ORGANIZATIONS
For accelerators, incubators, and funding bodies, the workbook offers a structured way to track the effectiveness of their programs, ensuring that resources are directed toward the most impactful interventions.

(SOCIAL) ENTERPRISES AND IMPACT BUSINESSES
The framework enables entrepreneurs and mission-driven businesses to move beyond anecdotal success stories and establish clear, evidence-based impact measurement strategies that enhance credibility and sustainability.

(SOCIAL) INNOVATORS
Individual changemakers and project leaders can use this methodology to better understand, communicate, and improve their impact, ensuring that their efforts contribute to systemic, long-term transformation.

FROM THEORY TO ACTION: UNDERSTANDING SOCIAL IMPACT IN PRACTICE

Social impact is often discussed in reports, policies, and research. In theory, it refers to positive changes created by social innovation, policies, or new initiatives. But in reality,

SOCIAL IMPACT IS MORE THAN JUST A CONCEPT - IT IS REAL, MEASURABLE CHANGE THAT IMPROVES LIVES AND STRENGTHENS COMMUNITIES.

We see social impact when an entrepreneur completes a business accelerator and successfully grows their business, creating jobs. It happens when someone from a marginalized background gains access to education, opening doors to new opportunities. It’s visible when a community shifts to sustainable practices that benefit both people and the environment.

Real social impact connects ideas with action.
To make sure our efforts lead to lasting change, we need to assess not just short-term results but long-term effects on communities.

Social innovation should promote fairness, inclusion, and resilience.
Without measuring impact, we risk assuming progress instead of proving it.

WHY ASSESSMENT IS CRUCIAL

One key question in social innovation is: "How do we know if we are truly making a difference?" Good intentions are important, but we need clear evidence to show real change. Social impact assessment helps ensure accountability, improve decision-making, and use resources effectively.

ENSURE ACCOUNTABILITY
Are we achieving real results, or just carrying out activities without meaningful change?

MAKE BETTER DECISIONS
If something isn't working, adjustments are needed. If something works, it should be scaled up.

USE RESOURCES WISELY
Funding, time, and effort should go to initiatives with the greatest impact.

PROVE AND IMPROVE RESULTS
Clear impact data builds credibility, attracts funding, and helps organizations refine their approach.

Impact assessment also connects social innovation efforts to broader global goals, such as the United Nations Sustainable Development Goals (SDGs). If we claim to reduce poverty, improve education, or create decent jobs, we need measurable proof. Impact measurement is not paperwork - it ensures that our work leads to meaningful, long- term change.

SUSTAINABLE DEVELOPMENT GOALS

WHY THEORY OF CHANGE (ToC) FOR IMPACT ASSESSMENT

Not all valuable outcomes can be measured financially. People have aspirations, challenges, and dignity, and the changes we create deserve recognition beyond profit or growth. That's why we chose the Theory of Change as the basis for this impact assessment framework - unlike rigid models, it offers a structured approach to understanding how and why specific actions lead to transformation, linking vision, interventions, and measurable impact.

The Theory of Change approach reflects real-life social innovation. It accounts for complexity and interdependencies.

It allows organizations to:

- Define their impact goals and pathways, clearly outlining the causality between actions and outcomes.
- Adapt to evolving contexts, responding to challenges and new insights.
- Capture systemic change, recognizing shifts in behavior and relationships that traditional metrics may miss.

Its emphasis on transparency and collaboration is also key. By making assumptions explicit, the Theory of Change fosters shared understanding and encourages dialogue: “Do we agree on this pathway? How can we optimize impact together?”
We also chose the Theory of Change because it aligns with our values. It prioritizes people over numbers, supports nuanced evaluation, and fosters continuous learning, ensuring our work remains purpose-driven and accountable to those we serve

PART 1.

PRECONDITIONS FOR SOCIAL IMPACT ASSESSMENT

PART 1.

PRECONDITIONS FOR SOCIAL IMPACT ASSESSMENT

1) Understanding the stakeholder ecosystem is key - impact goals must be defined and validated together with stakeholders

2) Impact goals and objectives. Measurable improvement targets, defined beneficiaries, and a set timeframe.

3) Outcomes and indicators. Measurable results, baseline data, and a data collection plan.

4) Evaluation methods. Aligned with the strategy, ensuring data accuracy and reliability.

5) Reporting process. Data - driven decisions, clear reporting and feedback loops.

6) Ethical compliance. Adherence to standards, data privacy, and consent.

PART 2.

STEP-BY-STEP GUIDE TO USING THE THEORY OF CHANGE (ToC) TO DESIGN AN IMPACT STRATEGY

STEP 1 - MAP YOUR STAKEHOLDER ECOSYSTEM

TASK

✓ **List all relevant stakeholders.**

✓ **Sort each stakeholder into the following categories:**

- Users - Persons who will directly interact with the product or service themselves.
- Payers - Persons transferring resources to your company as payment for a product or service.
- Decision makers - Persons who have the authority to decide on purchasing the product or service.
- Primary beneficiaries - Persons directly benefiting from the activity, the product or the service.
- Secondary beneficiaries - Persons indirectly benefiting through the impact on primary beneficiaries.
- Tertiary beneficiaries - Wider society or systems experiencing long-term positive effects from the enterprise's activities.

🔗 STAKEHOLDER ECOSYSTEM MAPPING WORKSHEET - APPENDIX NR1

STEP 1 - MAP YOUR STAKEHOLDER ECOSYSTEM

GUIDING QUESTIONS:

1. Who interacts with our service, product, or activity?
2. Who benefits from the change we aim to create?
3. Who supports or enables our work (financially, logistically, politically)?
4. Who could influence our success—positively or negatively?
5. Are there any people or groups affected indirectly, over time?
6. Who actually uses our service or product?
7. Who experiences the interface, tools, or activities firsthand?
8. Who funds or contributes money, time, or space?
9. Who covers the cost—even if they don’t use it themselves?
10. Who has the power to say yes or no to using, buying, or supporting this?
11. Who signs the agreement or approves the budget?
12. Who receives the most direct positive results from what we do?
13. Whose life or situation are we explicitly trying to improve?
14. Who benefits because someone else benefited?
15. What systems or communities might experience long-term gains?

STEP 2: DEFINE THE LONG-TERM IMPACT

TASK

✓ Identify the ultimate goal.
✓ Describe what the social innovation looks like once it has been achieved.
✓ Ensure it aligns with the mission and values of all stakeholders.

IMPACT STARTEGY WORKSHEET - APPENDIX NR2

STEP 2: DEFINE THE LONG-TERM IMPACT

TASK

- ✓ Identify the ultimate goal.
- ✓ Describe what the social innovation looks like once it has been achieved.
- ✓ Ensure it aligns with the mission and values of all stakeholders.

GUIDING QUESTIONS:

1. What long-term change do you want to see in the world or your community?
2. Who benefits, and how will their lives be different?
3. What does success look like in practice?
4. What specific improvements or changes can be observed?
5. Does this goal reflect what matters most to your key stakeholders?
6. Have you validated this vision with those affected or involved?

STEP 2: DEFINE THE LONG-TERM IMPACT

EXAMPLES

BY 2030

Social enterprises in our network operate as financially self-sustaining businesses, demonstrating stable revenue streams while maximizing social and environmental impact. Their resilience against economic downturns is strengthened, and they serve as key drivers of local employment and community well-being.

BY 2030

National policies fully integrate social entrepreneurship as a recognized and supported sector, with tailored funding mechanisms, tax benefits, and legal frameworks that enable social enterprises to scale and drive systemic change. Governments, businesses, and civil society collaborate effectively to foster an ecosystem where social innovation thrives.

BY 2035

Impact-driven organizations have embedded mental health and resilience frameworks into their daily operations, reducing burnout rates, improving decision-making, and fostering long-term well-being. As a result, these organizations achieve higher effectiveness in addressing social challenges while ensuring the sustainability of their teams and leadership.

STEP 3: MAP THE OUTCOMES PATHWAY

TASK

- ✓ Define the key changes needed to reach the long - term impact.
- ✓ Organize outcomes into short - term (1 - 2 years), medium - term (3 - 5 years), and long - term (5+ years).
- ✓ Each pathway maps how change happens, through key stakeholders and interventions, in a structured timeframe.

IMPACT STARTEGY WORKSHEET - APPENDIX NR2

STEP 3: MAP THE OUTCOMES PATHWAY

TASK

✓ Define the key changes needed to reach the long-term impact.
✓ Organize outcomes into short-term, medium-term, and long-term.

Each pathway maps how change happens, through key stakeholders and interventions, in a structured timeframe.

GUIDING QUESTIONS:

1. What needs to be different for your impact to become possible?
2. What shifts in behavior, systems, skills, or conditions are essential?
3. Who needs to change, and in what way?
4. Which changes can realistically happen soon (within 1 year)? Which will take more time (2–3 years)?
5. Which are the lasting effects that take longer but signal real impact?
6. How do these changes build on each other over time?

STEP 3: MAP THE OUTCOMES PATHWAY

EXAMPLES

1-2 YEARS — SHORT-TERM OUTCOMES

- Social enterprises receive structured training on business models, financial sustainability, and impact measurement.
- Early - stage social enterprises access seed funding, mentorship, and peer support.
- Key ecosystem stakeholders (investors, policymakers, accelerators) engage in discussions about long - term sector development.

3-5 YEARS — MEDIUM-TERM OUTCOMES

- A regional support network for social enterprises is established, providing ongoing mentorship and funding opportunities.
- Public and private sector collaborations increase investment in social enterprises.
- Social enterprises implement stronger financial strategies, reducing reliance on grants.

5+ YEARS — LONG-TERM OUTCOMES

- Social enterprises achieve financial sustainability, reinvesting profits into social impact.
- The social entrepreneurship ecosystem attracts mainstream investors and institutional support.
- A culture of sustainable impact business practices is embedded within the broader economy.

STEP 4: IDENTIFY ACTIVITIES & INTERVENTIONS

TASK

- ✓ Define actions your organization will take to drive each outcome.
- ✓ Interventions must connect directly to the outcomes pathway.
- ✓ Keep your focus on causality - how the activities lead to the expected outcomes.
- ✓ Define the measurable outputs that will result directly from each activity (e.g., # of events held, # of people trained, # of products delivered)

🔗 IMPACT STARTEGY WORKSHEET - APPENDIX NR2

STEP 4: IDENTIFY ACTIVITIES & INTERVENTIONS

TASK

- ✓ Define actions your organization will take to drive each outcome.
- ✓ Interventions must connect directly to the outcomes pathway.
- ✓ Keep your focus on causality - how the activities lead to the expected outcomes.

GUIDING QUESTIONS:

1. What do we need to do to make this outcome happen?
2. What kind of support, product, service, or interaction will create the desired change?
3. What activities have already proven effective — either by us or others?
4. Who must we engage or activate for this change to occur?
5. What is the mechanism of change? (What makes this activity effective?)
6. How will this action address a key barrier or enabler in the outcome pathway?
7. Does this action clearly connect to a short-, medium-, or long-term outcome?
8. Are these actions specific and concrete enough to implement and evaluate?
9. What tangible, countable results will this activity produce?
10. How will we know the activity has been completed or delivered as planned?

STEP 4: IDENTIFY ACTIVITIES & INTERVENTIONS

EXAMPLES

CAPACITY BUILDING

Develop and deliver training programs on business models, financial sustainability, and impact measurement.

MENTORSHIP & PEER SUPPORT

Establish long - term mentorship networks and peer - learning communities.

FUNDING & INVESTMENT

Provide early - stage funding through microgrants and investment - readiness support.

MARKET ACCESS

Facilitate partnerships between social enterprises and corporate buyers to expand market opportunities.

KNOWLEDGE SHARING

Publish best practices and success stories to attract investors and ecosystem supporters.

STEP 5: CLARIFY ASSUMPTIONS

TASK

- ✓ Identify critical assumptions about how interventions will lead to desired outcomes.
- ✓ Test assumptions through pilot initiatives and stakeholder feedback.

🔗 IMPACT STARTEGY WORKSHEET - APPENDIX NR2

STEP 5: CLARIFY ASSUMPTIONS

TASK

✓ Identify critical assumptions about how activities will lead to desired outcomes.
✓ Test assumptions through pilot initiatives and stakeholder feedback.

GUIDING QUESTIONS:

1. What are we assuming will happen as a result of this activity?
2. Why do we believe this intervention will lead to the desired outcome?
3. What must be in place (resources, motivation, partnerships, context) for this action to work?
4. Are we relying on any external factors (e.g., policy, market behavior, user engagement)?
5. What risks or uncertainties could prevent this outcome from happening?
6. Would this activity still work in a different context? Why or why not?
7. What is the smallest way we can test whether this assumption is true?
8. What feedback can we gather from stakeholders or users to verify our assumption?
9. How can we track whether the activity is actually driving change as expected?
10. If the assumption proves false, what could we do differently?
11. What evidence (qualitative or quantitative) do we need to feel confident in this approach?

STEP 5: CLARIFY ASSUMPTIONS

EXAMPLES

KEY ASSUMPTIONS:

- Training & mentorship lead to financial sustainability. → Social enterprises that receive structured training and mentorship will be more likely to develop sustainable business models and generate stable revenue.
- Funding enables long - term growth. → Access to seed funding will help social enterprises survive the early - stage "valley of death" and transition to financial self - sufficiency.
- Market demand for socially responsible products/services exists. → Consumers and businesses will prioritize purchasing from social enterprises when given viable options.
- Investors will engage if provided with evidence of impact. → Impact investors will support social enterprises if they see clear business cases and strong impact measurement.

HOW TO TEST:

- Conduct pilot training programs and track participants' business growth.
- Launch a small - scale investment fund and measure enterprise performance.
- Run targeted awareness campaigns to assess market interest.

STEP 6: DEFINE MEASURABLE INDICATORS

TASK

✓ **Set quantitative and qualitative metrics for tracking progress.**

GUIDING QUESTIONS:

1. What signals will show that we are moving toward our outcome?
2. What can we count or measure directly (quantitative)?
3. What can we describe or assess through feedback or observation (qualitative)?
4. Are the metrics specific enough to show meaningful change?
5. Will this data help us make decisions or improve our approach?
6. Can we realistically collect this data with the time and resources we have?
7. Can these metrics be compared over time or across similar initiatives?
8. Do these indicators reflect what truly matters to our stakeholders?

🔗 IMPACT INDICATOR DESIGN WORKSHEET - APPENDIX NR3

STEP 6: DEFINE MEASURABLE INDICATORS

EXAMPLES

ECONOMIC

- % of social enterprises with positive revenue growth (year - over - year comparison),
- Number of social enterprises accessing funding (grants, investments, or loans), % of social enterprises still operating after 3 years (survival rate),
- Increase in jobs created by supported social enterprises.

CAPACITY & KNOWLEDGE

- Number of enterprises completing training/mentorship programs,
- Self-reported confidence in business skills (pre - and post - training surveys, 1 - 5 scale)

MARKET & INVESTMENT READINESS

- Number of social enterprises securing corporate partnerships,
- % increase in customer base for supported social enterprises,
- % of trained social enterprises that secure investment within 12 months.

STEP 7: ENGAGE STAKEHOLDERS & REFINE

TASK

- ✓ Involve stakeholders (e.g. social enterprises, funders, policymakers, and community members) in feedback loops.
- ✓ Conduct regular reviews to adapt the strategy based on emerging challenges and opportunities.
- ✓ Use data - driven insights to improve interventions.

STEP 7: ENGAGE STAKEHOLDERS & REFINE

GUIDING QUESTIONS:

1. Who are the key stakeholders we need to involve in reviewing progress and impact?
2. How and when will we gather their feedback (e.g. surveys, interviews, workshops)?
3. What mechanisms do we have for integrating stakeholder insights into our decision-making?
4. What indicators or data points should we share with stakeholders to spark useful feedback?
5. How often will we review and reflect on our progress and challenges?
6. How will we decide if an activity, outcome, or assumption needs to be adjusted?
7. What is our process for turning insights into concrete improvements?
8. Are we closing the loop by informing stakeholders of what changes were made based on their input?

STEP 7: ENGAGE STAKEHOLDERS & REFINE

EXAMPLES

STAKEHOLDER ENGAGEMENT STRATEGIES

- Quarterly Feedback Sessions with Social Enterprises: Organize structured check-ins to gather insights on training effectiveness, funding access, and market challenges.
- Investor & Funder Roundtables: Facilitate discussions to align funding opportunities with social enterprise needs and investor expectations.
- Customer & Market Validation Panels: Engage customers of social enterprises to understand market demand and refine product-market fit.

DATA - DRIVEN ADAPTATION

- Number of enterprises completing training/mentorship programs,
- Self-reported confidence in business skills (pre - and post - training surveys, 1 - 5 scale)

REFINEMENT ACTIONS

- Number of social enterprises securing corporate partnerships,
- % increase in customer base for supported social enterprises,
- % of trained social enterprises that secure investment within 12 months.

PART 3.

ESTABLISHMENT OF MEASURING METHODOLOGY

INTRODUCTION

EFFECTIVE IMPACT ASSESSMENT REQUIRES A CLEAR AND EFFICIENT METHODOLOGY:

- The first step is selecting data collection methods such as surveys, interviews, financial records, or automated tracking tools.
- Next, responsibilities must be assigned, ensuring program managers, finance teams, or other staff collect and verify data.
- **To avoid extra workload, data collection should be integrated into existing workflows, making it a seamless part of daily operations.**
- Finally, the process must be efficient, enabling the annual impact report to be compiled in under 10 hours, ensuring sustainability while providing valuable insights for decision - making and continuous improvement.

SELECTION OF DATA COLLECTION TOOLS & SOURCES

Social innovation initiatives operate in complex ecosystems, requiring diverse data points to measure success effectively.

COMMON DATA SOURCES INCLUDE:

- Enterprise growth metrics (e.g., revenue, job creation, financial sustainability),
- Policy changes (e.g., new regulations influenced by advocacy efforts),
- Ecosystem engagement levels (e.g., collaboration between stakeholders, participation in programs).

SELECTION OF DATA COLLECTION TOOLS & SOURCES

Establishing uniform reporting formats and using automated tracking tools can reduce errors and streamline reporting, ensuring that impact data is both comparable and actionable for decision-making and long-term strategy development.

TO GATHER AND MANAGE THIS DATA EFFICIENTLY, ORGANIZATIONS CAN USE VARIOUS COLLECTION TOOLS:

- Google Forms and survey platforms help capture feedback from beneficiaries and partners
- CRM systems track stakeholder engagement and funding flows
- Financial software ensures accurate reporting of financial health and investment impact
- Dedicated impact measurement platforms, such as IRIS+, B Lab assessments or others, provide standardized frameworks for evaluating environmental performance.

ROLES & RESPONSIBILITIES

Establishing clear roles and responsibilities in impact measurement ensures data is collected, verified, and reported efficiently.

The right approach depends on organization size and capacity. Larger organizations may appoint a dedicated impact officer responsible for overseeing the process, while smaller teams can distribute tasks across departments, integrating data collection into existing roles. E.g. program managers tracking beneficiary outcomes, finance teams handling financial impact, and marketing teams gathering stakeholder feedback.

EXAMPLE OF HOW A STRUCTURED DATA COLLECTION WORKFLOW MAY IMPROVE EFFICIENCY:

- Data gathering - program managers collect impact data through surveys, financial reports, and stakeholder interviews.
- Verification - a second team member (e.g., finance or operations lead) reviews data for accuracy and consistency.
- Compilation & reporting - the impact officer or a designated team member consolidates verified data into reports and dashboards.

EMBEDDING IMPACT MEASUREMENT INTO OPERATIONS

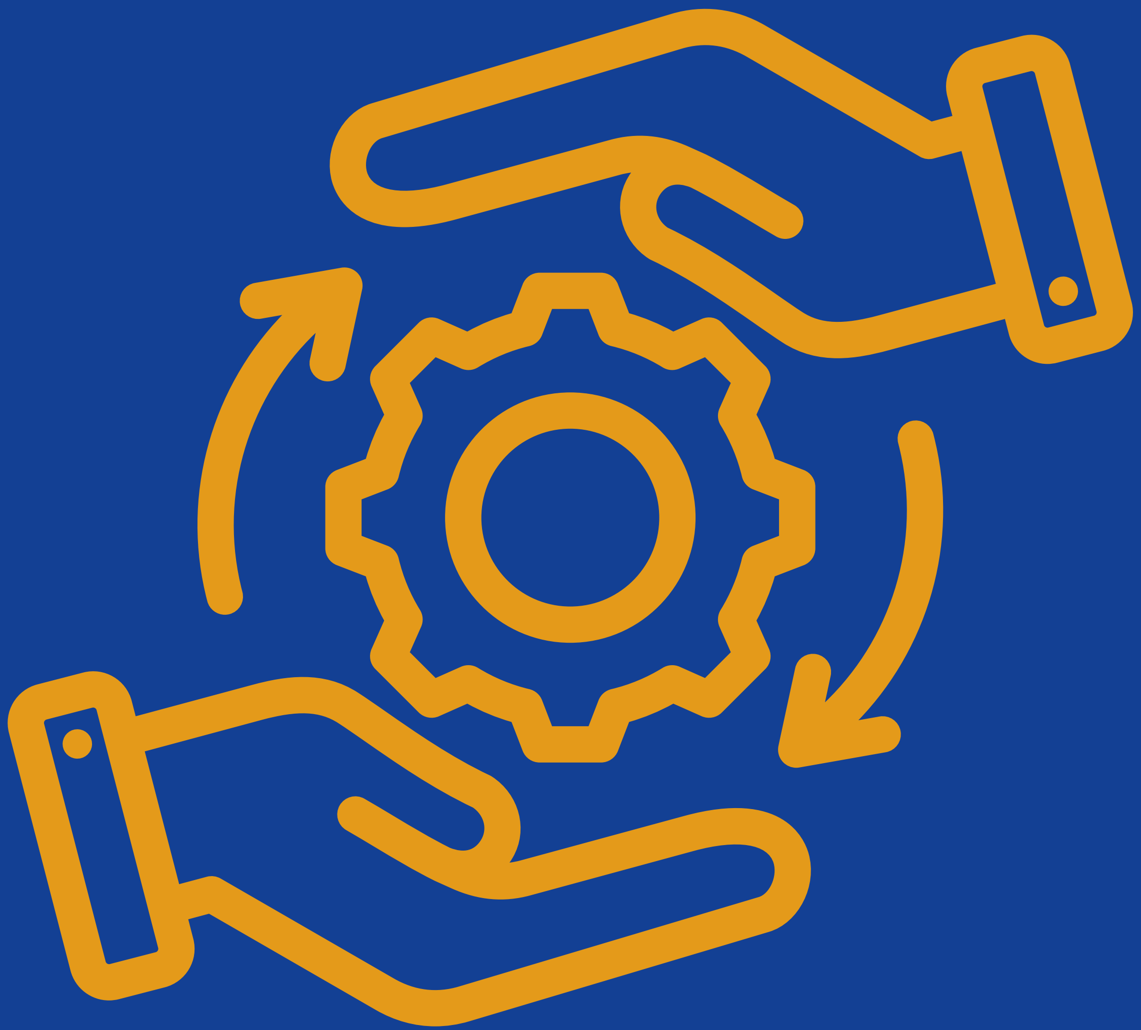
For impact measurement to be effective, it must be embedded into daily operations, rather than treated as an afterthought or extra task.

- The key is to align data collection with existing workflows, ensuring that measurement becomes a natural part.
- A rational approach is to integrate impact tracking into funding applications (ensuring impact metrics align with grant requirements), stakeholder reports (automating updates on key performance indicators), and project evaluations (collecting data at key milestones rather than retroactively).

Hidden challenges often include staff resistance due to added workload or data silos where different teams collect separate, uncoordinated information. The solution is to assign clear responsibilities and use automation to reduce effort

Manual data entry can be eliminated by automation tools like:
- dashboards,
- CRM systems,
- real-time data tracking (e.g., Google Sheets linked to surveys or API integrations)

However, organizations must also prioritize data security and ethics, particularly when handling sensitive community or employee data. This includes ensuring informed consent, limiting access to confidential information, and complying with data protection regulations.



ENSURING EFFICIENCY & ACTIONABILITY

For impact measurement to be sustainable, it must be efficient and actionable - providing insights without excessive time or resources. The goal is to structure data collection so that compiling an annual report takes less than 10 hours while maintaining accuracy and relevance.

STEP-BY-STEP GUIDE TO AN EFFICIENT DATA COLLECTION PROCESS:

USE PRE-FORMATTED TEMPLATES
Standardized reporting templates save time and ensure consistency.

CONDUCT QUARTERLY MINI-REVIEWS
Instead of scrambling at year-end, schedule quick quarterly check-ins to verify and adjust data collection.

ASSIGN CLEAR ROLES
Ensure each team member knows their responsibility for impact measurement.

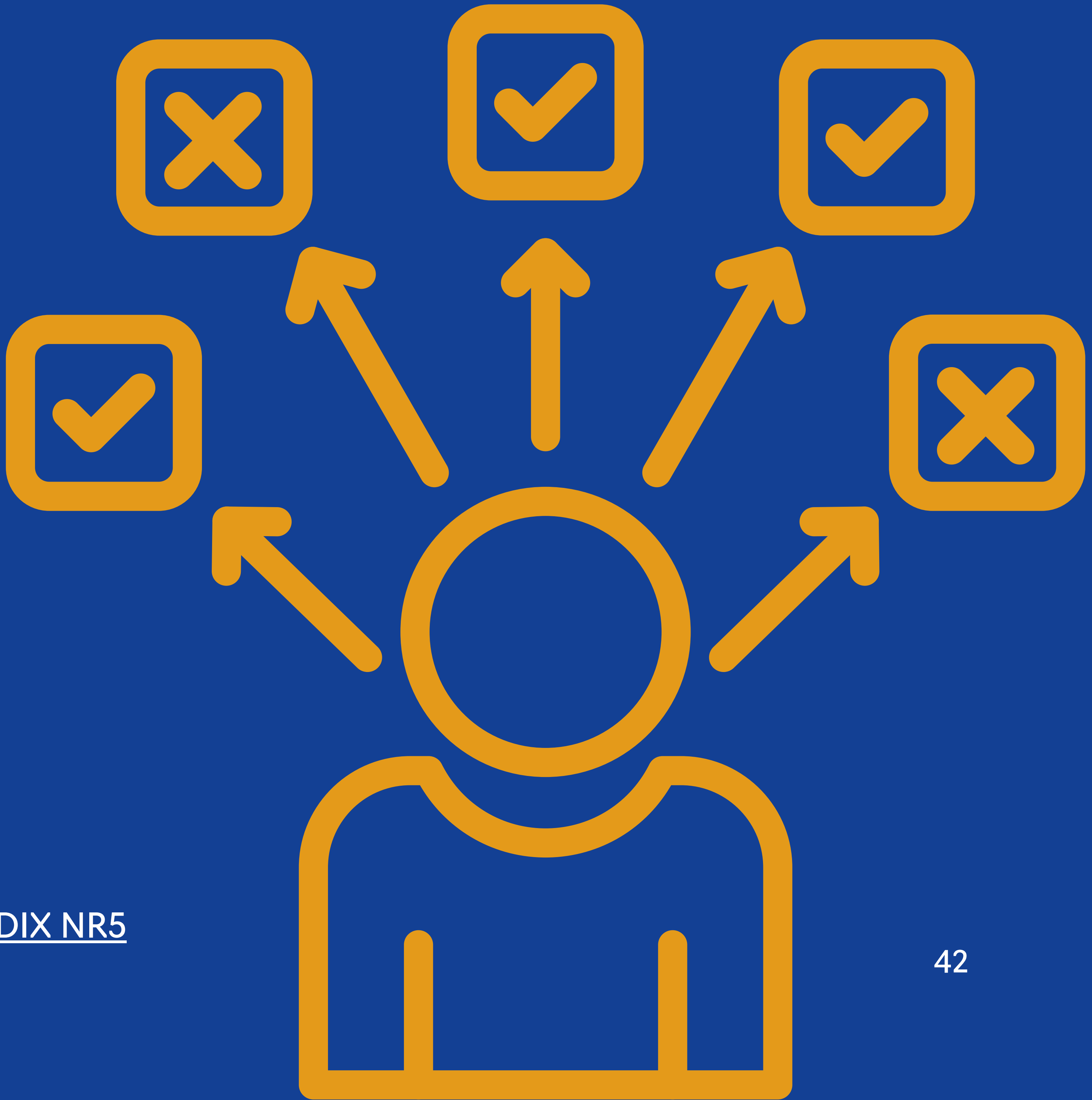
AUTOMATE DATA COLLECTION
Use surveys, CRM systems, or financial software to continuously collect and store impact data, reducing the need for manual entry.

DEFINE KEY METRICS EARLY
Select the most critical impact indicators, avoiding data points that create extra workload, but add no value.

EFFICIENCY REVIEW CHECKLIST

GUIDING QUESTIONS:

1. Are we tracking only essential metrics?
2. Is our data collection automated where possible?
3. Do all responsible team members understand their role?
4. Are we reviewing and cleaning data quarterly?



INDICATOR QUALITY CHECKLIST - APPENDIX NR4

EXAMPLES OF INDICATORS BY ORGANIZATION TYPE & IMPACT AREA - APPENDIX NR5

PART 4.

PRACTICAL IMPLEMENTATION & TOOLS

DATA COLLECTION TOOLS & SOFTWARE

The choice of tools should align with an organization's size, data needs, and available resources.

SURVEYS & FEEDBACK FORMS

Use technological tools that are user-friendly and cost-effective for collecting beneficiary and stakeholder feedback.
They will help you to track qualitative outcomes, satisfaction levels, and behavioral changes.

Google FORMS   Typeform   SurveyMonkey

DATA COLLECTION TOOLS & SOFTWARE

The choice of tools should align with an organization's size, data needs, and available resources.

CRM SYSTEMS FOR STAKEHOLDER ENGAGEMENT are widely available on the market.

Choose the one that suits your workflow, organization size and budget.

Salesforce for Nonprofits, ClickUp, or OnePageCRM for small organizations, and many more apps manage relationships with funders, beneficiaries, and partners.
CRMs streamline data collection by automating interactions, tracking engagement, and integrating reporting features.

salesforce.org nonprofit cloud

ClickUp

OnePageCRM

DATA COLLECTION TOOLS & SOFTWARE

The choice of tools should align with an organization's size, data needs, and available resources.

AI-DRIVEN ANALYTICS & DASHBOARDS

- Power BI, Google Data Studio, and Tableau allow organizations to visualize impact trends in real time.
- AI tools, such as ChatGPT-powered analytics or Sopact's IMM system, automate insights and highlight patterns for better decision-making.

DATA COLLECTION TOOLS & SOFTWARE

The choice of tools should align with an organization's size, data needs, and available resources.

FINANCIAL & OPERATIONAL TRACKING

- QuickBooks, Xero, or Impact Management Project (IMP) tools ensure that financial data is accurately linked to social impact.
- Helps organizations measure efficiency, cost-effectiveness, and financial sustainability alongside impact outcomes.

intuit quickbooks 2025

xero

IMPACT MANAGEMENT PROJECT

INSTRUCTIONS FOR MAPPING YOUR MEASUREMENT POINTS

TASK

✓List each indicator you plan to track.

✓For each indicator:

- Define how often it needs to be measured (monthly, quarterly, etc.).
- Choose the most natural time(s) in your year to collect the data (e.g., end of month reports, board reviews, grant deadlines).
- Assign responsibility for the data collection.
- Note any tools or automations required to simplify the process.

TIP: Look at your existing workflows (e.g., reporting, reviews, events) to identify when data is already being collected, piggyback on those moments.

INDICATOR	FREQUENCY	TIMING (MONTH IN YEAR)

DESIGNING YOUR SOCIAL IMPACT MEASUREMENT & MANAGEMENT PROCESS WORKSHEET - APPENDIX NR6

INSTRUCTIONS FOR CONNECT TO EXISTING WORKFLOWS

TASK

✓For each indicator, ask:

- When are we already doing something that might capture this data?
- Can we align data collection with team routines such as:
  - Client onboarding or offboarding
  - Team meetings or check-ins
  - Service delivery
  - Monthly or quarterly reports
  - Events, training sessions, surveys
  - Any other recurring tasks or processes

✓Fill in the table with concrete connections.

TIPS

- Think about regular rhythms: weekly meetings, annual reviews, email check-ins.
- Consider digital tools already in use: CRM systems, Google Forms, Slack polls.
- Identify who touches what: Match indicators to people or teams already managing that area.

EXISTING ACTIVITY / WORKFLOW (e.g., onboarding, events, reports)	RESPONSIBLE PERSON / ROLE / TEAM	COLLECTION METHOD (e.g., survey, observation, form)

DESIGNING YOUR SOCIAL IMPACT MEASUREMENT & MANAGEMENT PROCESS WORKSHEET - APPENDIX NR6

INSTRUCTIONS FOR PLANNING THE TOOLS & AUTOMATIONS

TASK

✓For each indicator, identify how the data will be captured:
- Use tools like: Google Forms, Typeform, CRM, Airtable, Excel, email filters, Slack check-ins, project management tools (e.g. Trello, Asana).

✓Decide if the collection will be manual or automated.

✓Explore if AI tools can support the process by:
- Summarizing feedback
- Pre-filling reports
- Tagging and sorting responses
- Sending automatic reminders or prompts

✓Fill in the table below.

TOOL / PLATFORM	MANUAL / AUTOMATED	AI USED? (YES/NO + HOW)

DESIGNING YOUR SOCIAL IMPACT MEASUREMENT & MANAGEMENT PROCESS WORKSHEET - APPENDIX NR6

DRAFT YOUR IMPACT DASHBOARD (DESIGN EXERCISE)

GOAL

✓Create a first prototype of your impact dashboard. This task helps you visualize how your key data will come together in one place, and how it will support communication, reflection, and decision-making.

INSTRUCTIONS

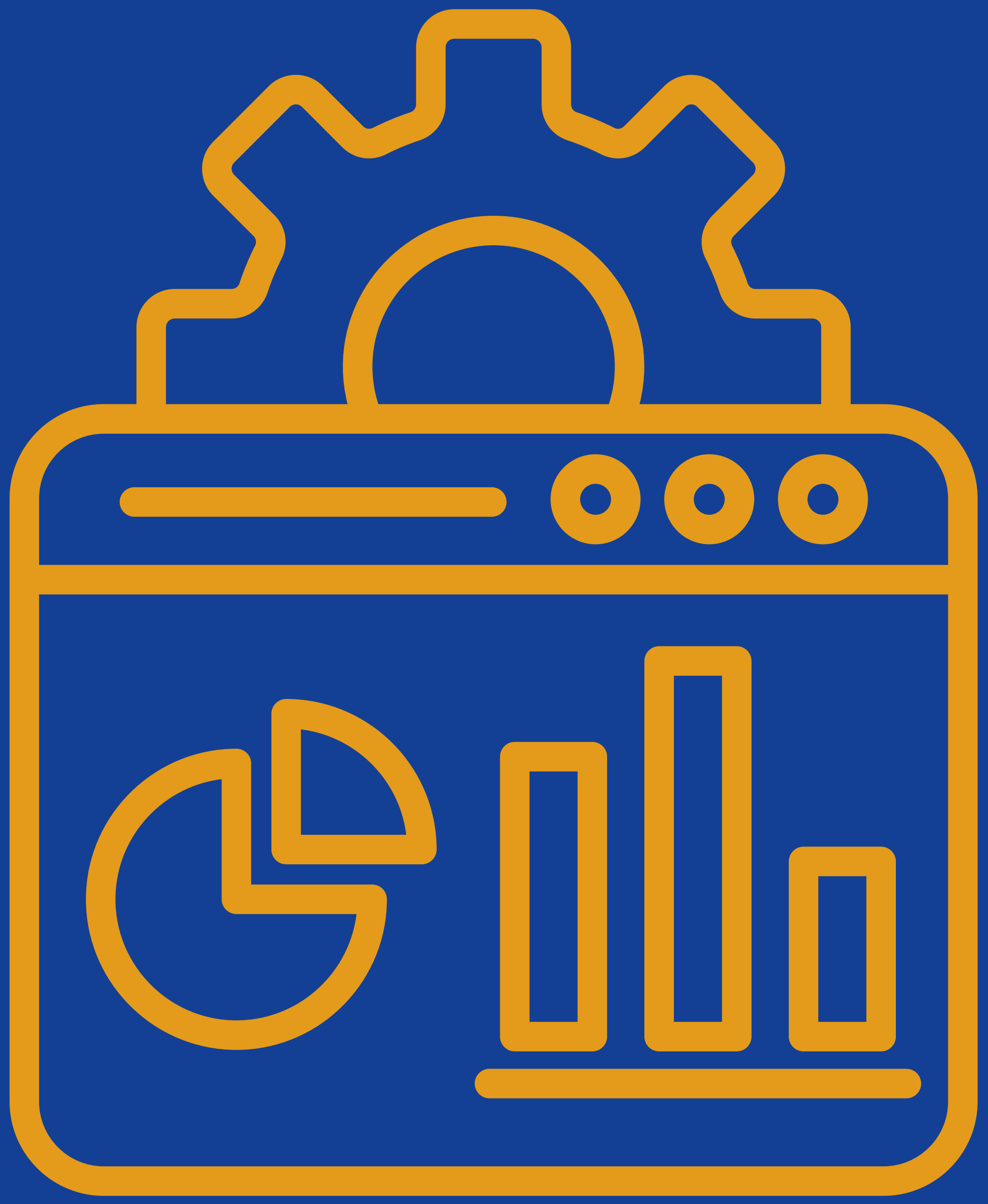
1. Use the sections below or your own dashboard section ideas to sketch out your dashboard layout, define dashboard logic, and simulate one sample view of the data.
2. The dashboard may include Key metrics = Indicators, Updates = Trends and summaries, stories or qualitative insights (if used).
3. If your dashboard is meant to serve multiple groups, you could create views by audience (e.g. internal, funders, partners).
4. Avoid overloading. Keep it focused on meaningful change.
5. Remember - You are designing for use, not for beauty. Focus on what helps your team, board, or funders make better decisions at a glance.

INDICATOR	TYPE OF DATA	VISUAL FORMAT	NOTES FOR VIEWER

🔗DESIGNING YOUR SOCIAL IMPACT MEASUREMENT & MANAGEMENT PROCESS WORKSHEET - APPENDIX NR6

USEFUL DASHBOARD COMPONENTS

- Data aggregation. Google Sheets will auto-compile survey responses into key impact metrics.
- Visual metrics. Charts/graphs showing impact trends over quarters.
- Automated calculations. Summarizing revenue growth, job creation, training outcomes, etc.
- Color-coded alerts. Highlights if impact goals are being met or need adjustments.
- Annual report generator. Auto-fills an impact report with key data.



DESIGNING YOUR SOCIAL IMPACT MEASUREMENT & MANAGEMENT PROCESS WORKSHEET - APPENDIX NR6

WRITE YOUR REPORTING PLAN

GOAL

✓Design a simple, realistic plan so your annual impact report can be completed in 8 hours or less.

INSTRUCTIONS

1. Break the reporting process into clear steps (e.g., “Collect survey data,” “Summarize indicators,” “Draft slides”).
2. Assign who will do each step.
3. Specify where the data or content will come from.
4. Note the tool used (dashboard, AI tool, Google Doc, etc.).
5. Estimate the time for each step.

TIP: Consider pre-formatted templates or AI-generated summaries.

STEP	PERSON RESPONSIBLE	CONTENT / SOURCE OF DATA	TOOL / METHOD	ESTIMATED TIME

DESIGNING YOUR SOCIAL IMPACT MEASUREMENT & MANAGEMENT PROCESS WORKSHEET - APPENDIX NR6

PART 5.

CUSTOMIZATION FOR DIFFERENT STAKEHOLDERS

SOCIAL INNOVATION CLUSTERS

DEFINITION.

A social innovation cluster is a geographically concentrated network of interconnected organizations, institutions, and individuals that collaborate to address social challenges through innovative approaches. These clusters combine resources, expertise, and diverse perspectives to create, implement, and scale solutions to complex social problems.

KEY CHARACTERISTICS OF A SOCIAL INNOVATION CLUSTER:

Ecosystem approach - connects diverse stakeholders, including NGOs, businesses, academia, and government.

Collaboration & knowledge sharing - encourages partnerships, joint initiatives, and the exchange of best practices.

Support for social enterprises - provides mentorship, funding access, and capacity - building programs.

Focus on systemic change - aims to address root causes of social and environmental issues rather than just symptoms.

Innovation & experimentation - promotes new models, technologies, and policies to drive sustainable impact.

EXAMPLES OF SOCIAL IMPACT GOALS FOR SOCIAL INNOVATION CLUSTER

Increase the number of social enterprises in our cluster by 15% over the next year.

Secure €500,000 in additional funding for cluster members by the end of the year.

Advocate for a new government policy supporting social enterprise tax benefits.

Organize four large-scale knowledge-sharing events on social innovation.

EXAMPLES OF SOCIAL IMPACT INDICATORS FOR SOCIAL INNOVATION CLUSTER

ECONOMIC IMPACT
Growth of member organizations, new jobs created within the cluster, increased investment in social innovation.

- % increase in funding attracted for member organizations.
- X of jobs created across member organizations.
- X of new enterprises joining the cluster.

SOCIAL WELL-BEING AND INCLUSION
Improved working conditions and mental health support for cluster member organizations, increased diversity and inclusion initiatives.

- % of member organizations with employee well-being policies.
- X of mental health and inclusion-related initiatives supported.

ENVIRONMENTAL SUSTAINABILITY
Cluster-wide green initiatives, resource-sharing efficiency, waste management improvement, and lower carbon footprint across supported projects.

- % of member organizations with sustainability policies.
- Reduction in shared resource consumption (e.g., office space, materials).
- Reduction in waste

POLICY AND SYSTEMS CHANGE
Successful advocacy efforts leading to policy changes, increased public sector engagement.

- X of policy recommendations submitted.
- X of policy changes influenced.

INNOVATION AND CAPACITY BUILDING
Number of new solutions developed, knowledge-sharing events, training sessions for members.

- X of knowledge-sharing events organized.
- X of new partnerships facilitating innovation.
- X of members in training sessions

EXAMPLES OF SOCIAL IMPACT OUTCOMES FOR SOCIAL INNOVATION CLUSTER

The cluster grew from 50 to 58 members, surpassing the 15% growth goal.

€600,000 in funding was secured, exceeding the target.

Two policy recommendations were officially adopted by local authorities.

Five training events were held, with 90% of attendees reporting increased knowledge.

SOCIAL INNOVATION CLUSTER SOCIAL IMPACT MEASUREMENT PROCEDURE

1. Quarterly member surveys (automated form on funding, job creation, sustainability).

2. Event tracking system (simple log of policy engagements, training sessions).

3. Annual cluster-wide report compiled from survey results & event logs.

SOCIAL INNOVATION CLUSTER QUARTERLY IMPACT TRACKING TEMPLATE & SURVEYS

QUARTERLY SURVEY QUESTIONS

Economic impact

- How many new enterprises joined the cluster this quarter? (Numeric)
- How much funding has been secured for member organizations this quarter? (Numeric)
- How many jobs have been created by cluster members? (Numeric)

Social well-being

- How many member organizations have implemented employee well-being policies this quarter? (Numeric)
- Have any new mental health or inclusion initiatives been supported? (Yes/No)
- Please describe a key well-being initiative launched this quarter. (Short text)

Environmental sustainability

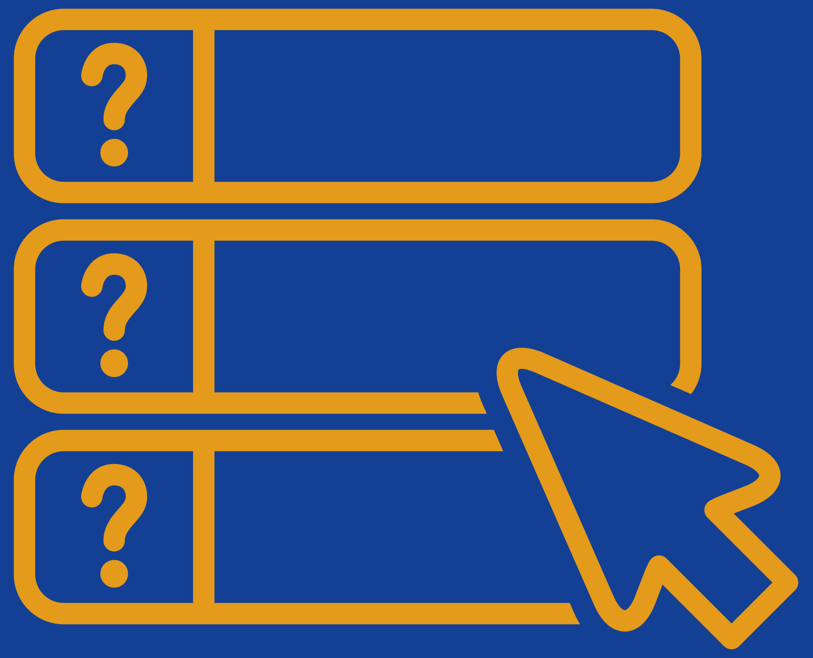
- What percentage of member organizations now have sustainability policies? (Numeric)
- Have shared resource consumption reduction measures been introduced? (Yes/No)

Policy & systems change

- How many policy recommendations were submitted this quarter? (Numeric)
- How many advocacy events did the cluster participate in? (Numeric)

Innovation & capacity building

- How many knowledge-sharing events were organized this quarter? (Numeric)
- How many new partnerships have been formed to facilitate innovation? (Numeric)



SOCIAL INNOVATION SUPPORT ORGANIZATIONS

DEFINITION.

A Social Innovation Support Organization (SISO) is an entity that fosters, accelerates, and sustains social innovation by providing resources, expertise, and networks to individuals and organizations working on solutions to social and environmental challenges. These organizations play a crucial role in strengthening ecosystems for social impact by offering funding, capacity-building, strategic guidance, and policy advocacy.

KEY CHARACTERISTICS OF SISO:

Mission-driven - Focused on enabling and scaling innovative solutions for societal challenges.

Capacity-building - Provides training, mentorship, and tools to enhance the effectiveness of social enterprises and changemakers.

Funding & investment support - Offers grants, venture philanthropy, impact investments, or access to financial resources.

Ecosystem development - Connects social innovators with networks, partnerships, and collaborative platforms.

Policy & advocacy – Engages with policymakers to create supportive regulatory environments for social innovation.

Impact measurement – Helps organizations assess and optimize their social and environmental impact.

Cross-sector collaboration – Works across public, private, and civil society sectors to drive systemic change.

EXAMPLES OF SOCIAL IMPACT GOALS FOR SISO

Help 30% of supported enterprises achieve revenue growth this year.

Train 100 entrepreneurs in resilience and mental health strategies.

Ensure that 50% of supported enterprises implement sustainability practices.

Influence the creation of a national grant program for social enterprises.

EXAMPLES OF SOCIAL IMPACT INDICATORS FOR SISO

ECONOMIC IMPACT
Financial sustainability of supported social enterprises, number of enterprises achieving revenue growth.

- % of supported enterprises achieving revenue growth.
- X of total funding distributed to supported enterprises.

SOCIAL WELL-BEING AND INCLUSION
Support provided for mental health and resilience of entrepreneurs, improved inclusion, accessibility and reduced inequality in programs.

- % of supported enterprises implementing workplace well-being measures.
- X of entrepreneurs receiving mental health or resilience training.

ENVIRONMENTAL SUSTAINABILITY
Green practices adopted by supported enterprises, sustainability-focused business models supported.

- % of supported enterprises with sustainable business models.
- Reduction in waste/energy usage by supported enterprises.

POLICY AND SYSTEMS CHANGE
Advocacy success for social enterprise policies, partnerships with policymakers or regulators.

- X of advocacy meetings attended.
- X of new social enterprise policies influenced.

INNOVATION AND CAPACITY BUILDING
Number of enterprises receiving training, effectiveness of mentorship programs, improvement in entrepreneurs' skills

- X of training sessions/workshops conducted.
- % increase in skills improvement among beneficiaries (self-assessment survey).

EXAMPLES OF SOCIAL IMPACT OUTCOMES FOR SISO

35% of supported enterprises reported revenue growth.

120 entrepreneurs attended resilience training, with 85% reporting improved coping strategies.

60% of supported enterprises integrated sustainability measures into their operations.

The national government announced a new social enterprise grant program, incorporating key recommendations.

SOCIAL IMPACT MEASUREMENT PROCEDURE FOR SISO

1. Quarterly impact tracking surveys for supported enterprises.
2. Grant application & reporting data (align with existing funder reporting).
3. Tracking attendance at advocacy & training events (simple digital log).
4. Post training feedback surveys of supported enterprises.
5. End-of-year impact summary auto-generated from survey data.

SISO QUARTERLY IMPACT TRACKING TEMPLATE & SURVEYS

QUARTERLY SURVEY QUESTIONS

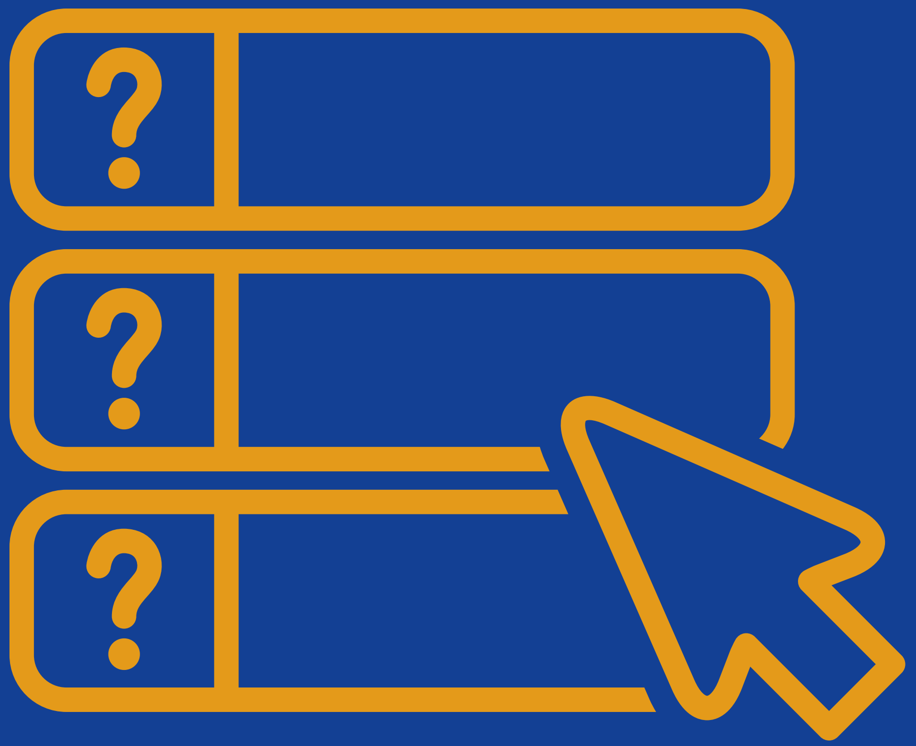
Economic impact:
- How many enterprises have received funding support this quarter? (Numeric)
- What percentage of supported enterprises reported revenue growth? (Numeric)

Social well-being
- How many entrepreneurs received mental health or resilience training? (Numeric)
- What percentage of supported enterprises implemented well-being policies? (Numeric)

Environmental Sustainability
- How many enterprises implemented sustainability measures this quarter? (Numeric)
- Describe any significant environmental initiatives supported this quarter. (Short text)

Policy & Systems Change
- How many advocacy meetings were attended? (Numeric)
- Have there been any major regulatory shifts influenced by the organization? (Yes/No)

Innovation & Capacity Building
- How many training sessions/workshops were conducted? (Numeric)
- What percentage of beneficiaries reported skill improvement? (Numeric)



SOCIAL ENTERPRISES AND IMPACT BUSINESSES

DEFINITION

A social enterprise or impact business is an organization that applies entrepreneurial principles to solve social or environmental challenges while maintaining financial sustainability. Unlike traditional businesses, their primary goal is social impact, not just profit, and they reinvest a significant portion of their earnings into their mission.

KEY CHARACTERISTICS OF SISO:

- Impact-driven - prioritizes social or environmental change over profit maximization.
- Financially sustainable - generates revenue through commercial activities instead of relying solely on grants or donations.
- Reinvestment of profits - a significant portion of profits is reinvested into the mission rather than distributed to shareholders.
- Innovative approach - uses business models and market-based strategies to tackle societal problems.
- Measurable impact - tracks and reports social or environmental outcomes to ensure accountability.
- Hybrid structure - can operate as a nonprofit with income-generating activities, a for-profit with a social mission, or a cooperative.
- Stakeholder engagement - works closely with communities, employees, and beneficiaries to co-create solutions.
- Scalability & sustainability - aims for long-term, systemic change rather than short-term fixes.

EXAMPLES OF SOCIAL IMPACT GOALS FOR SOCIAL ENTERPRISES

- Increase revenue by 20% while maintaining social impact.
- Hire at least five employees from marginalized communities.
- Reduce waste production by 30% within the next year.
- Engage in three policy discussions to promote social entrepreneurship.

EXAMPLES OF SOCIAL IMPACT INDICATORS FOR SOCIAL ENTERPRISES AND IMPACT BUSINESSES

ECONOMIC IMPACT
Job creation, income growth of employees, financial stability of the enterprise.

- % revenue increase year-over-year.
- X of full-time and part-time jobs created.
- X of customers/ clients served.

SOCIAL WELL-BEING AND INCLUSION
Quality of jobs provided, stakeholder well-being, inclusive hiring practices.

- % of employees reporting improved work-life balance.
- X of marginalized individuals or representatives of vulnerable groups employed or supported.

ENVIRONMENTAL SUSTAINABILITY
Reduction in waste, energy efficiency, sustainable sourcing.

- % reduction in resource consumption per unit of production, or % of waste reduction
- X of sustainability practices implemented.

POLICY AND SYSTEMS CHANGE
Contributions to legislative discussions, public engagement in advocacy efforts.

- X of social impact campaigns participated in.
- X of public engagements advocating for policy change.

INNOVATION AND CAPACITY BUILDING
Improved solutions for social problems, skill development among employees and beneficiaries.

- X of new/improved solutions developed or implemented
- X of staff trained on social impact best practices.

EXAMPLES OF SOCIAL IMPACT OUTCOMES FOR SOCIAL ENTERPRISES AND IMPACT BUSINESSES

Revenue increased by 22%, allowing for reinvestment in impact programs.

Five new employees from marginalized communities were hired and retained.

Waste production was reduced by 28%, with a new recycling system in place.

Participated in four policy discussions, resulting in stronger relationships with government officials.

SOCIAL IMPACT MEASUREMENT PROCEDURE FOR SOCIAL ENTERPRISES AND IMPACT BUSINESSES

1. Automated financial tracking (pulls revenue & job data from accounting software).
2. Quarterly internal impact reporting form (HR surveys for well-being, environmental metrics).
3. Annual customer impact survey (if applicable).
4. Policy engagement log (track meetings, petitions, or legislative changes).
5. End-of-year impact summary compiled from report and survey data.

QUARTERLY IMPACT TRACKING TEMPLATE & SURVEYS FOR SOCIAL ENTERPRISES

QUARTERLY SURVEY QUESTIONS

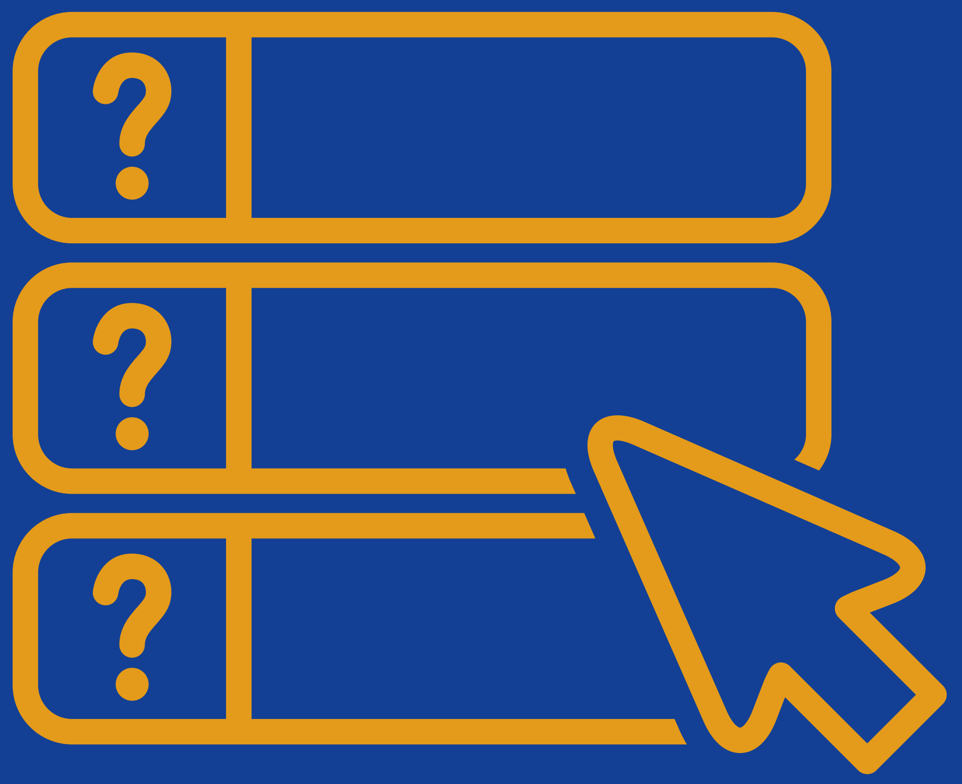
Economic impact:
- What was the revenue change (%) this quarter? (Numeric)
- How many jobs (full-time/part-time) were created? (Numeric)

Social well-being
- What percentage of employees report improved work-life balance? (Numeric)
- How many marginalized individuals were employed or supported? (Numeric)

Environmental sustainability
- What percentage reduction in resource consumption was achieved? (Numeric)
- How many new sustainability practices were implemented? (Numeric)

Policy & systems change
- How many social impact campaigns were supported? (Numeric)
- What policy discussions or legislative meetings were attended? (Short text)

Innovation & Capacity building
- How many new/improved solutions were developed? (Numeric)
- How many employees were trained in social impact best practices? (Numeric)



INDIVIDUAL SOCIAL INNOVATORS

DEFINITION.

An Individual Social Innovator is a person who develops and implements new ideas, models, or solutions to address social, environmental, or systemic challenges. They work across sectors, leveraging creativity, entrepreneurship, and collaboration to create meaningful and sustainable impact.

KEY CHARACTERISTICS OF INDIVIDUAL SOCIAL INNOVATOR:

- Purpose-driven - motivated by a deep commitment to solving social or environmental challenges.
- Innovative thinker - develops new approaches, methods, or technologies to drive systemic change.
- Resilient & adaptable - navigates uncertainty, learns from failure, and continuously refines solutions.
- Collaborative - engages with diverse stakeholders, from communities to policymakers, to create inclusive solutions.
- Entrepreneurial mindset - identifies opportunities, mobilizes resources, and takes initiative to scale impact.
- Ethical & transparent - upholds integrity, accountability, and social responsibility in their work.
- Systems-change oriented - aims to shift policies, behaviors, or structures rather than just treating symptoms of social problems.

EXAMPLES OF SOCIAL IMPACT GOALS FOR INDIVIDUAL SOCIAL INNOVATORS

Raise €20,000 for a community impact project.

Train 200 people in climate-friendly practices.

Reduce plastic waste in the community by 25% through an awareness campaign.

Get at least 500 signatures on a petition for a policy change.

EXAMPLES OF SOCIAL IMPACT INDICATORS FOR INDIVIDUAL SOCIAL INNOVATORS

ECONOMIC IMPACT
Securing grants/funding, impact on local economic empowerment.

- X of total funds secured for impact initiatives.
- X of community members benefiting financially from initiatives.

SOCIAL WELL-BEING AND INCLUSION
Engagement with communities, improvement in target group well-being.

- X of community members engaged in projects.
- % of participants reporting positive changes due to the initiative.

ENVIRONMENTAL SUSTAINABILITY
Personal or project-related sustainability initiatives.

- X of waste reduced or recycled.
- X of sustainability-related actions taken.

POLICY AND SYSTEMS CHANGE
Participation in campaigns, contribution to policy shifts.

- X of advocacy events attended.
- X of policy recommendations submitted.

INNOVATION AND CAPACITY BUILDING
Personal learning, influence on broader networks, new solutions introduced.

- X of new solutions introduced.
- % increase in personal network or collaborations.

EXAMPLES OF SOCIAL IMPACT OUTCOMES FOR INDIVIDUAL SOCIAL INNOVATORS

€22,000 was raised, allowing the project to expand its reach.

250 people participated in sustainability training sessions.

Plastic waste collection in the community increased, achieving a 27% reduction.

600 people signed the petition, which was formally submitted to policymakers.

SOCIAL IMPACT MEASUREMENT PROCEDURE FOR INDIVIDUAL SOCIAL INNOVATORS

1. Simple impact tracker spreadsheet (updated monthly with key metrics).
2. Quarterly self-assessment form (captures outreach, engagement, and funding secured).
3. Event participation log (records advocacy efforts).
4. End-of-year summary auto-generated from tracking logs.

QUARTERLY IMPACT TRACKING TEMPLATE & SURVEYS FOR INDIVIDUAL SOCIAL INNOVATORS

QUARTERLY SURVEY QUESTIONS

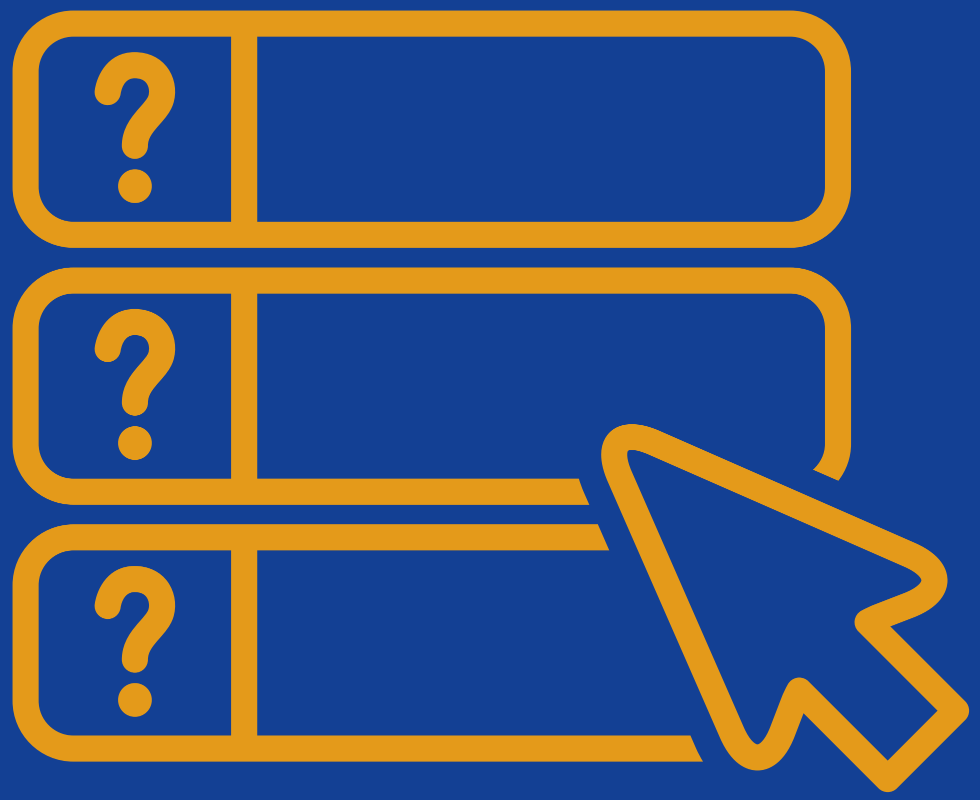
Economic impact:
- How much funding was raised for impact initiatives this quarter? (Numeric)
- How many community members benefited financially from initiatives? (Numeric)

Social well-being
- How many community members were engaged in projects? (Numeric)
- What percentage of participants reported positive changes due to the initiative? (Numeric)

Environmental sustainability
- How much waste was reduced or recycled? (Numeric)
- How many sustainability-related actions were taken? (Numeric)

Policy & systems change
- How many advocacy events were attended? (Numeric)
- How many policy recommendations were submitted? (Numeric)

Innovation & capacity building
- How many new solutions were introduced? (Numeric)
- What percentage increase in network or collaborations was achieved? (Numeric)



APPENDICES

APPENDIX №1 - MAP YOUR STAKEHOLDER ECOSYSTEM

EcoSystem Canvas

STAKEHOLDERS	USERS	PAYERS	DECISION MAKERS	PRIMARY BENEFICIARIES	SECONDARY BENEFICIARIES	TERTIARY BENEFICIARIES
Examples	*Persons who will directly interact with the product or service themselves.*	*Persons transferring resources to your company as payment for a product or service.*	*Persons who have the authority to decide on purchasing the product or service.*	*Persons directly benefiting from the activity, the product or the service.*	*Persons indirectly benefiting through the impact on primary beneficiaries*	*Wider society or systems experiencing long-term positive effects from the enterprise's activities.*
Product or Service of your organization №1						
Product / Service №2						
Product / Service №3						
Product / Service №4						
Product / Service №5						

🔗 STAKEHOLDER ECOSYSTEM MAPPING WORKSHEET - APPENDIX NR1

APPENDIX №2- IMPACT STARTEGY WORKSHEET

Impact Strategy Worksheet

IMPACT

A **1-sentence** description of the ultimate, long-term societal change your organization wants to create.

What is the big societal change you want to achieve?	

LONG TERM OUTCOMES

What sustained changes do you expect in people's lives as a result of your work in 6-10 years?			

MEDIUM TERM OUTCOMES

What changes in knowledge, skills, behavior, or status do you expect in 3-5 years?			

🔗 IMPACT STARTEGY WORKSHEET - APPENDIX NR2

APPENDIX №2- IMPACT STARTEGY WORKSHEET

Impact Strategy Worksheet

SHORT TERM OUTCOMES			
What changes in knowledge, skills, behavior, or status do you expect soon after, during 1-2 years?			
OUTPUTS			
What direct products or services result from your activities?			
ACTIVITIES			
What are you doing to make change happen?			

[IMPACT STARTEGY WORKSHEET - APPENDIX NR2]

APPENDIX №2- IMPACT STARTEGY WORKSHEET

Impact Strategy Worksheet

INPUTS

What resourses do you need?			

ASSUMPTIONS

What must be true so that these activites would lead to the described outcomes and impact?			

🔗 IMPACT STARTEGY WORKSHEET - APPENDIX NR2

APPENDIX №3- IMPACT INDICATOR DESIGN WORKSHEET

MPACT INDICATOR DESIGN WORKSHEET

			Choose indicators that are: 1. Relevant. 2. Clear. 3. Feasible. 4. Comparable. 5.Actionable.	**Choose indicators that are:** 1. Aligned with the outcome. 2. Realistically measurable with your team's resources. 3. Useful for decision-making, not just reporting.	**Automate data collection!!!** Use surveys, CRM systems, or financial software to continuously collect and store impact data, reducing the need for manual entry where possible.	Monthly Quarterly Yearly Once per project
STEP	**CATEGORY**	**YOUR ANSWER**	**POSSIBLE INDICATORS**	**CHOSEN INDICATORS**	**DATA SOURCE**	**FREQUENCY OF MEASUREMENT**
1	IMPACT					
2	LONG-TERM OUTCOMES					
3	MEDIUM-TERM OUTCOMES					
4	SHORT-TERM OUTCOMES					
5	OUTPUTS					
6	ACTIVITIES					
7	ASSUMPTIONS*					

*Indicators of Assumptions have to be observed in order to test the assumptions, while other indicators - measured, in order to assess progress of the strategy implementation.

🔗 IMPACT INDICATOR DESIGN WORKSHEET - APPENDIX NR3

APPENDIX №4- INDICATOR QUALITY CHECKLIST

INDICATOR QUALITY CHECKLIST

RELEVANCE		
Is the indicator directly related to the outcome we are trying to achieve?	Answer	Points
Does this indicator clearly reflect the change we want to measure?	Yes - 1 / No - 0	
Would a change in this indicator signal progress or lack of progress toward our outcome?	Yes - 1 / No - 0	
CLARITY		
Is the indicator specific, understandable, and unambiguous?	Yes - 1 / No - 0	
Would someone unfamiliar with our project understand what this indicator means?	Yes - 1 / No - 0	
Could two different people interpret this indicator in the same way?	Yes - 1 / No - 0	
Is it clearly defined (numerator, denominator, units, time period)?	Yes - 1 / No - 0	

🔗 INDICATOR QUALITY CHECKLIST - APPENDIX NR4

APPENDIX №4- INDICATOR QUALITY CHECKLIST

FEASIBILITY		
Can we realistically collect data on this indicator with our current resources?	Yes - 1 / No - 0	
Do we have access to the necessary data or know how to collect it?	Yes - 1 / No - 0	
Can the data be collected without excessive time or cost?	Yes - 1 / No - 0	
Is there someone responsible for this data collection?	Yes - 1 / No - 0	
COMPARABILITY		
Can this indicator be benchmarked or tracked over time or across organizations?	Yes - 1 / No - 0	
Has this indicator been used by others in our sector or region?	Yes - 1 / No - 0	
Can we compare this indicator's values year-on-year?	Yes - 1 / No - 0	
Are there existing standards, frameworks, or data sets to align with?	Yes - 1 / No - 0	

🔗 INDICATOR QUALITY CHECKLIST - APPENDIX NR4

APPENDIX №4- INDICATOR QUALITY CHECKLIST

ACTIONABILITY		
Will this indicator help us make decisions, improve, or demonstrate value?	Yes - 1 / No - 0	
Will this data influence strategic decisions, program adjustments, or funding applications?	Yes - 1 / No - 0	
Does it tell us something we can act on if results are good or bad?	Yes - 1 / No - 0	
Will stakeholders care about this indicator?	Yes - 1 / No - 0	
TOTAL POINTS		0

🔗 INDICATOR QUALITY CHECKLIST - APPENDIX NR4

APPENDIX №5 - EXAMPLES OF INDICATORS BY ORGANIZATION TYPE & IMPACT AREA

EXAMPLES OF INDICATORS BY ORGANIZATION TYPE & IMPACT AREA

	IMPACT AREAS				
INSTITUTION	**ECONOMIC**	**SOCIAL & WELL-BEING**	**ENVIRONMENTAL SUSTAINABILITY**	**POLICY & SYSTEMS CHANGE**	**INNOVATION & CAPACITY BUILDING**
UNIVERSITIES	- % of graduates employed within 6 months - Avg. graduate income - % of programs linked to labor market needs	- Self-reported skills improvement - % of students involved in community projects - Mental health support access rate	- # of sustainability courses offered - Campus CO_2 emissions per student - % of research projects on climate or SDGs	- # of research-policy collaborations - Involvement in policy advisory boards - # of students participating in civic engagement programs	- # of student-led innovations - % of faculty trained in new teaching methods - Interdisciplinary programs launched
MUNICIPALITIES	- Cost-efficiency of public services - Local tax revenue growth - % of services digitized	- % of citizens engaged in public consultations - Satisfaction with public services - Average service access time	- % of municipal fleet that is electric - % of energy from renewables in public buildings - Waste recycling rate	- # of policies co-created with residents - Implementation rate of citizen proposals - Use of participatory budgeting	- # of innovation pilots tested - # Partnerships with civic tech or startups - # Staff trained in innovation methods
ACCELERATORS	- % of supported startups surviving 12+ months - Startup revenue growth - Investment attracted by startups	- Founder well-being scores (via survey) - % of diverse founders supported - Peer learning session participation	- # of startups addressing sustainability goals - % of green business models among portfolio - Support for circular economy startups	- Involvement in startup policy advocacy - Support for startups working on public sector innovation - Engagement in regional innovation strategies	- # of startups launched - % of participants improving their business skills - # of mentors, experts involved
SOCIAL ENTERPRISES	- % of income from sales (not grants) - Break-even or surplus rate - Client acquisition cost	- Employee retention rate - Staff satisfaction - # of beneficiaries with improved life outcomes	- Use of eco-materials or zero-waste practices - CO_2 savings or reduction initiatives - Environmental certifications held	- Participation in policy consultations - Advocacy campaigns led or joined - Influence on sector-relevant policies	- New services developed - Staff trained in innovation or digital skills - % of budget allocated to R&D
INNOVATION HUBS / CLUSTERS	- % of supported ventures that monetize - Economic value of IP generated - Revenue from ecosystem services	- % of participants from target (e.g., underserved) groups - Sense of belonging in hub (survey) - Accessibility of space and programs	- Energy use per square meter - Green events policy adoption - # of sustainability-focused innovation projects	- Representation in local innovation strategies - Public-private collaborations supported - Role in regional development plans	- # of collaborations launched - New tools or prototypes created - Cross-sector labs or hackathons held

🔗 EXAMPLES OF INDICATORS BY ORGANIZATION TYPE & IMPACT AREA - APPENDIX NR5

APPENDIX №6 - DESIGNING YOUR SOCIAL IMPACT MEASUREMENT & MANAGEMENT PROCESS WORKSHEET

TASK 1 - MAP YOUR MEASUREMENT POINTS. **INSTRUCTIONS.** **1. List each indicator you plan to track.** **2. For each indicator:** -Define how often it needs to be measured (monthly, quarterly, etc.) -Choose the most natural time(s) in your year to collect the data (e.g., end of month reports, board reviews, grant deadlines). -Assign responsibility for the data collection. -Note any tools or automations required to simplify the process. *Tip: Look at your existing workflows (e.g., reporting, reviews, events) to identify when data is already being collected, piggyback on those moments.*			**TASK 2 - CONNECT TO EXISTING WORKFLOWS.** **INSTRUCTIONS** **1. For each indicator, ask:** -When are we already doing something that might capture this data? -Can we align data collection with team routines such as: -Client onboarding or offboarding -Team meetings or check-ins -Service delivery -Monthly or quarterly reports -Events, training sessions, surveys -Any other recurring tasks or processes **2. Fill in the table with concrete connections.** *Tip:* *-Think about regular rhythms: weekly meetings, annual reviews, email check-ins.* *-Consider digital tools already in use: CRM systems, Google Forms, Slack polls.* *-Identify who touches what: Match indicators to people or teams already managing that area.*			**TASK 3. PLAN THE TOOLS & AUTOMATIONS.** **INSTRUCTIONS.** **1. For each indicator, identify how the data will be captured:** - Use tools like: Google Forms, Typeform, CRM, Airtable, Excel, email filters, Slack check-ins, project management tools (e.g. Trello, Asana). **2. Decide if the collection will be manual or automated.** **3. Explore if AI tools can support the process by:** -Summarizing feedback -Pre-filling reports -Tagging and sorting responses -Sending automatic reminders or prompts **4. Fill in the table below.**		
INDICATOR	**FREQUENCY**	**TIMING (WHEN IN YEAR)**	**EXISTING ACTIVITY / WORKFLOW (e.g., onboarding, events, reports)**	**RESPONSIBLE PERSON / ROLE / TEAM**	**COLLECTION METHOD (e.g., survey, observation, form)**	**TOOL / PLATFORM**	**MANUAL OR AUTOMATED**	**AI USED? (YES/NO + HOW)**

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TASK 4 - DRAFT YOUR IMPACT DASHBOARD (DESIGN EXERCISE).

GOAL: Create a first prototype of your impact dashboard. This task helps you visualize how your key data will come together in one place, and how it will support communication, reflection, and decision-making.

INSTRUCTIONS.

1. Use the sections below or your own dashboard section ideas to sketch out your dashboard layout, define dashboard logic, and simulate one sample view of the data.
2. The dashboard may include Key metrics = Indicators, Updates = Trends and summaries, stories or qualitative insights (if used).
3. If your dashboard is meant to serve multiple groups, you could create views by audience (e.g. internal, funders, partners)
4. Avoid overloading. Keep it focused on meaningful change.
5. Remember - You are designing for use, not for beauty. Focus on what helps your team, board, or funders make better decisions at a glance.

Dashboard Title (optional)What's the main purpose or theme?	*E.g. Internal Impact Tracker, Team Progress Board, Funders' Snapshot, etc*	DATA SOURCE ⬇️	DATA SOURCE ⬇️	DATA SOURCE ⬇️	DATA SOURCE ⬇️	DATA SOURCE ⬇️	DATA SOURCE ⬇️
Main Sections or Tabs	E.g.Impact Areas, Long-term Outcome Indicators, Medium term Outcome Indicators, Short-term Outcome Indicators, Activities & Outputs, Stakeholder Feedback	Tab 1	TAB 2	TAB 3	TAB 4	TAB 5	TAB 6

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Intended Users & Access Levels	WHO WILL SEE IT?	INTERNAL TEAM	BOARD	FUNDERS	PUBLIC	OTHER
	HOW OFTEN WILL THEY SEE IT?	LIVE VIEW	MONTHLY	QUARTERLY	YEARLY	OTHER
Create Dashboard Layout Sketch						

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OR FILL THIS TABLE

INDICATOR	TYPE OF DATA	VISUAL FORMAT	NOTES FOR VIEWER
e.g. # people served	*340*	*Progress bar or line chart*	*Goal: 500 this year*
e.g. # people served	*340*	*Progress bar or line chart*	*Goal: 500 this year*
e.g. # people served	*340*	*Progress bar or line chart*	*Goal: 500 this year*
e.g. # people served	*340*	*Progress bar or line chart*	*Goal: 500 this year*
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TASK5. WRITE YOUR REPORTING PLAN.

GOAL: Design a simple, realistic plan so your annual impact report can be completed in 8 hours or less.

INSTRUCTIONS.
1. Break the reporting process into clear steps (e.g., "Collect survey data," "Summarize indicators," "Draft slides").
2. Assign who will do each step.
3. Specify where the data or content will come from.
4. Note the tool used (dashboard, AI tool, Google Doc, etc.).
5. Estimate the time for each step.
Tip: Consider pre-formatted templates or AI-generated summaries.

EXAMPLE

STEP	PERSON RESPONSIBLE	CONTENT / SOURCE OF DATA	TOOL / METHOD	ESTIMATED TIME
Download KPIs	Operations Manager	Dashboard	Airtable / Google forms / Notion / Trello / Asana, etc. export → Google Sheets	0.5
Summarize feedback	AI	Google Form responses	Chat GPT / AI summary tool	0.5
Draft report text	Communications Lead	KPI data + success stories	Google Docs (report template)	2
Create visual charts	Communications Lead	Dashboards, or other tools	Canva / Flourish / Excel	1.5
Final review + edits	CEO / Director	Draft report	Comments in Google Docs	1
Format for funders	Communications Lead	Final version	Export to PDF / PowerPoint / Canva, etc	0.5

YOUR PLAN

STEP	PERSON RESPONSIBLE	CONTENT / SOURCE OF DATA	TOOL / METHOD	ESTIMATED TIME

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THANK YOU!