



IN-DEPTH SOCIAL IMPACT MEASUREMENT & MANAGEMENT ONLINE TRAINING

LIVE SESSION, MODULE 1, 23 NOVEMBER 2021, 09:00-12:00 CET

How To Set-up An Impact Measurement And Management System At The Social Purpose Organisation (SPO) Level – From Setting Objectives To Analysing Stakeholders



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THE COURSE AGENDA

Florian Tuder, EVPA



Module 1

How to set-up an impact measurement and management system at the social purpose organisation (SPO) level – from setting objectives to analysing stakeholders

E-Learning phase

Preparation for the live session and assessment of comprehension

On Zoom:

Module 1 Live Session

23 November 2021

9-12am CET

Speakers and facilitators:

- Adam Richards, Social Value Intl.
- Sara Seganti, EVPA
- Florian Tuder, EVPA

Setting up impact goals at the SPO level

- Introduction to the impact measurement and management space
- Impact questions
- Setting up objectives, audience and purpose, analyse stakeholders at the SPO level (Step 1 and 2 of the EVPA's five-step framework to measure impact)

Module 2

How to set-up an impact measurement and management system at the social purpose organisation (SPO) level – from defining outcome chains and indicators to valuation and reporting.

E-learning phase

Preparation for the live session and assessment of comprehension

On Zoom:

Module 2 Live Session

25 November 2021
9-12am CET

Speakers and facilitators:

- Adam Richards, Social Value Intl.
- Sara Seganti, EVPA
- Florian Tuder, EVPA

Managing consequences at the SPO level

- Recap and Q&A
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- Reflection on Theory of Change and outcome chains
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- Defining outcome chains
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- Defining indicator targets & thresholds (Step 3 of the EVPA's five-step framework to measure impact)

Module 3

Global trends on the impact measurement and management landscape

E-learning phase

On Zoom:

Module 3 Live Session

30 November 2021
9-12am CET

Speakers and facilitators:

- Priscilla Boiardi, OECD
- Adam Richards, Social Value Intl.
- Sara Seganti, EVPA
- Florian Tuder, EVPA

Preparation for the live session and assessment of comprehension

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- Valuation and impact (Step 4 of the EVPA's five-step framework to measure impact)
- Monitoring & Reporting (Step 5 of the EVPA's five-step framework to measure impact)
- International development of IMM practice, Priscilla Boiardi
- Conclusions and Q&A

Module 4

E-learning phase

On Zoom:

Module 4 Live Session

2 December 2021
09-12am CET

Speakers and facilitators:

- Sofia Shaginyan, Navstrechu Peremenam
- Bennet Barth & Maya Volwahren, Respond Accelerator, BMW Foundation
- Adam Richards, Social Value UK
- Sara Seganti, EVPA
- Florian Tuder, EVPA

The practical experience of two EVPA members: best practices in IMM from the funders' perspective

Preparation for the live session and assessment of comprehension

- Reflections on measuring and managing impact from the funders' perspective
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- Examples from practice – two investors *for* impact will showcase how to measure and manage impact.
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- *Sofia Shaginyan,
Navstrechu Peremenam*
- *Bennet Barth & Maya Volwahren,
Respond Accelerator - BMW Foundation*
-
- Conclusions, Q&A, and wrap-up



- Have a **practical understanding** of impact measurement frameworks and their implementation
- Understand what it means to **set goals at SPO level** and to monitor them
- Reflect on **consequences at the SPO level**: who changes, how they change and how can measure this change?
- Understand the importance of **managing impact**



- Have a practical understanding of what is it to **set up an impact measurement system at the BSO's level** and to manage it at the **portfolio level**
- Gain confidence to be able to **use data on social impact to make changes** in activities to increase social value for people



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WHAT DO WE MEAN BY VALUE, IMPACT AND MANAGEMENT?

Adam Richards, Social Value International

IMPACT

The amount of change in people's lives that is a result of the activities

VALUE

Relative importance of different changes

MANAGE

Do things to increase positive changes & reduce negative changes

MAXIMISE

Make changes in an attempt to create as much value as possible

M

measure

find out **how much of a change** has occurred

M

manage

do things to **increase positive** changes and **reduce negative** changes

M

maximise

making as much of a difference as possible **with the resources available?**

Two screens for Materiality

An impact is material if it matters to the people affected

This will therefore affect the decision we take

Relevant (qualitative judgement) to at least one of the following: your policies, your stakeholders, work of peers, societal norms, short term financial impacts. 1st screen— include or not?

Significant (quantitative judgement) means that the real or potential impact of the issue (both positive and negative) has passed a threshold that means it influences decisions and actions — 2nd screen- keep in or not?

Audience and purpose

Different audiences have different purposes (decisions to make)

- They need evidence presented differently - with varying degrees of granularity to aggregation
 - **Funders/investors** and the public need more aggregation
 - **Management/operations** need detail (granularity)
- They also need different levels of verification of the results to have the confidence to use them
 - **Funders/investors** and the public need external verification
 - **Management/operations** need scrutiny from those whose lives are affected



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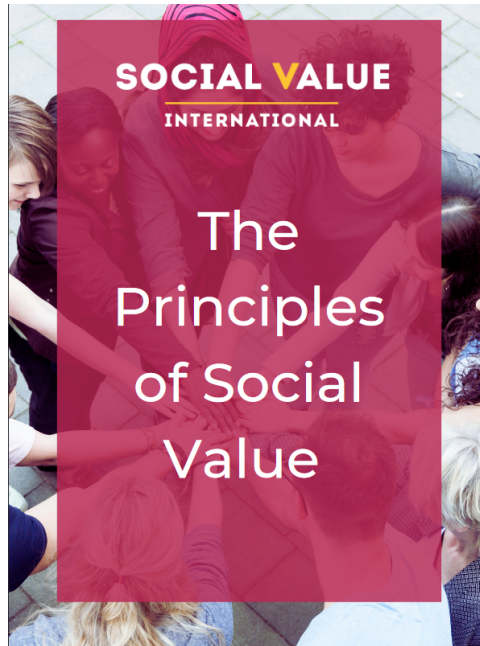


Principles that you can apply to answer those questions applied in a framework, that will help you manage, plan and make decisions to increase the value created for your stakeholders by your activities

THE PRINCIPLES OF SOCIAL VALUE

Adam Richards, Social Value International

Principles of Social Value





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FIVE STEPS PROCESS AND PRACTICE SPO LEVEL

Adam Richards, Social Value International

Impact Measurement as a:

- **General framework**
(process approach)
- **Learning Process**
- **Management Tool**





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STEP 1 SETTING UP OBJECTIVES AT SPO LEVEL

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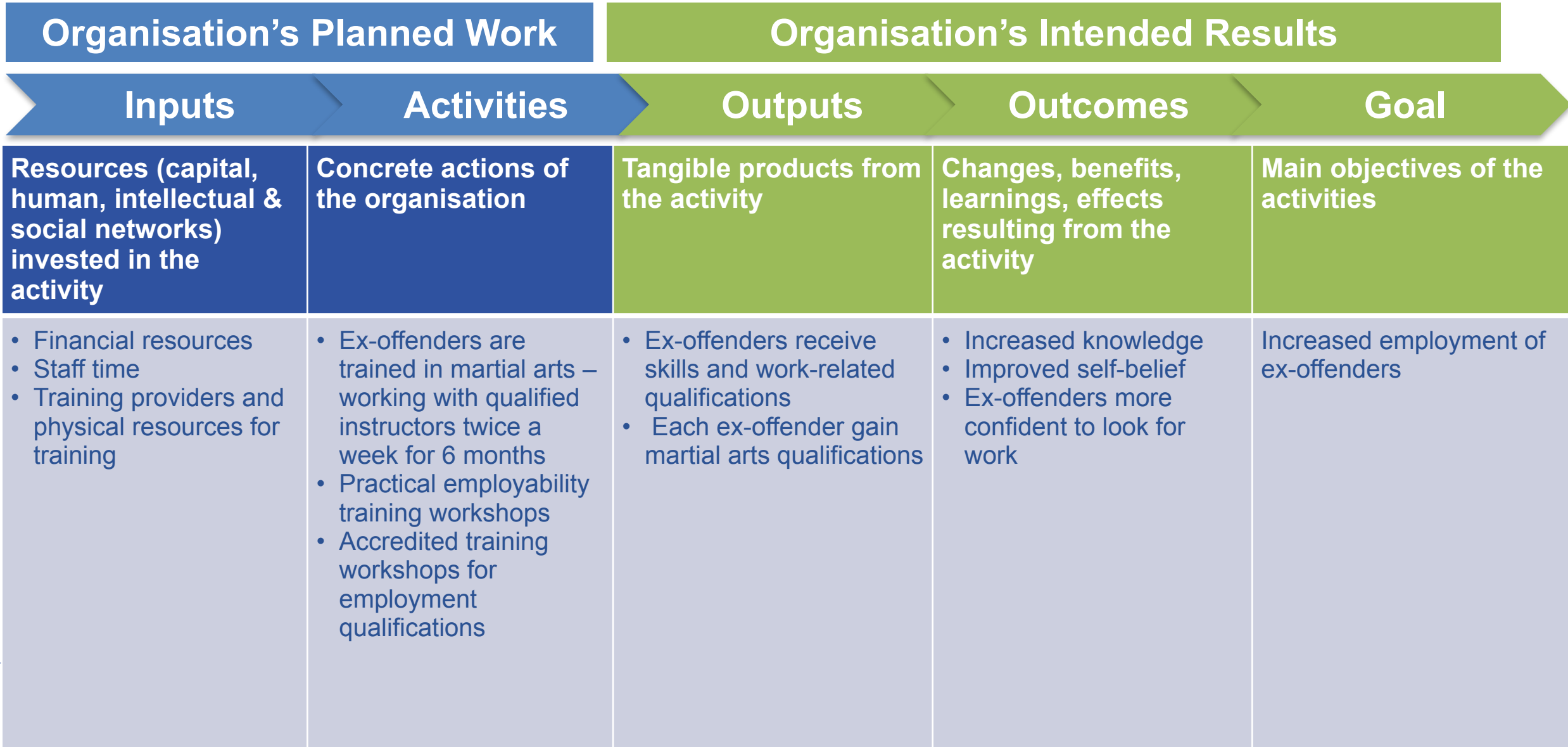


- Set specific impact objectives: social problem → proposed solutions
- More specific objectives means better preparation for impact measurement
- Wide range of methods & tools available: all include elements of **theory of change**

- Identify the **beneficiaries** you are working for, and set their **needs, characteristics**, and the **impact goal** you want to achieve
- Work backwards to define the **outcomes**, i.e. the changes experienced by the beneficiaries that contribute to the achievement of the final goal. Support with **evidence!**
- How will **activities** make this change happen?
- What are the **enablers**?



Source: NPC





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*WHO EXPERIENCES CHANGES?
WHAT OUTCOMES ARE (OR ARE LIKELY) EXPERIENCED?*

STEP 2 ANALYSE STAKEHOLDERS AT SPO LEVEL

Adam Richards, Social Value International

IMM PROCESS/ STEP 2: ANALYSING STAKEHOLDERS



- **Stakeholder:** “Any party affecting and/or effected by the activities of the organisation”
- Understand
 - *Expectations/interests*
 - *contribution*
 - *potential impact SPO’s work will have on them.*
- Two parts:
 - Stakeholder **identification**
 - Stakeholder **engagement**

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