

# ASSESSING YOUR SOCIAL IMPACT

A guide to developing an assessment approach that meets your challenges



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# SOCIAL IMPACT ASSESSMENT, AN APPROACH THAT WORKS FOR YOUR PROJECT!

Social impact assessment is a concept that is gaining traction in the Social and Solidarity Economy (SSE), both in terms of views expressed by financiers and actions initiated by SSE enterprises themselves. New practices are emerging and many SSE entrepreneurs are still asking themselves, “should I start assessing my impact? And if so, how?”

While the aim of creating a positive impact is a core part of the SSE, it sometimes lacks a formal framework. It cannot be a substitute for economic viability; the two closely complement one another. With this in mind, impact assessment should not be used solely to demonstrate accountability to financiers. Designed as a strategic management tool, it should support the project in fulfilling its mission. It should also enable social utility to move centre stage, and throw light on how actions contribute to systemic change. Finally, it can be a tool for continuous improvement, interaction with stakeholders and social innovation.

But with so many approaches to choose from, how to get started?

As a national resource centre for social impact assessment, Avise is here to help organisations of all sizes and all resource levels find answers and take this strategic challenge on board.

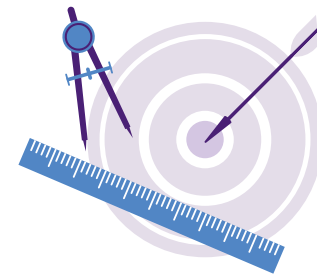
While it takes time, resources and expertise, assessment is above all a collective and sustainable approach. It is worth careful preparation to choose a method that matches your situation and needs.

Happy reading!

JÉRÔME SADDIER

PRESIDENT OF AVISE  
PRESIDENT OF CRÉDIT COOPÉRATIF

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# SOCIAL UTILITY AS A CORE CONSIDERATION



Social impact assessment is a key challenge for enterprises in the social and solidarity economy (SSE)<sup>(1)</sup>, which place social and environmental goals at the heart of their actions. It can be used to analyse other forms of value creation that go beyond financial value alone, particularly contributions to ecological and social transition. This is not possible with conventional business management tools that focus on purely economic factors.

This assessment serves very different objectives. While it is often used to report activities to stakeholders, it is also a strategic tool to better understand and explain an organisation's social utility, motivate stakeholders, and more. It is crucial for all SSE enterprises to be able to grasp their impact in a structured way and make this dynamic a lasting part of their business model.

But how to get started? How to find your way among all the methods and tools available? Which means and resources should you mobilise to achieve relevant results, while keeping operations running smoothly?

Designed for leaders of organisations and their teams, as well as providers of assistance and finance, this guide aims to throw light on challenges related to social impact assessment and provide the keys to adopting an approach that matches your situation. It sets out the essential steps and identifies organisational requirements. This guide also offers operational tools for each step and, finally, points to key resources and actors that can provide assistance for ESS enterprises along their assessment path.

(1) The French law of 1 July 2014 established three conditions to be recognised as a SSE enterprise: ensure participative governance; limit profit-making; and pursue a goal other than just distributing profit. While non-profits, cooperatives, foundations and mutually-owned companies are considered to "automatically" belong to the social and solidarity economy, the law opens up the SSE to any commercial company that satisfies these conditions, particularly by including them in its articles of association, and pursues a social utility.

**Social impact assessment makes it possible to define, measure and put a social value on your actions. It throws light on projects by analysing their effects and the changes they generate among stakeholders.**

*"Social impact assessment is essential for actors in the SSE: it enables them to value the social utility generated by their projects, going beyond strictly financial performance."*

**CHRISTOPHE GENTER**  
DIRECTOR OF THE TERRITORIAL AND SOCIAL COHESION DEPARTMENT  
BANQUE DES TERRITOIRES

# 1

## GETTING STARTED WITH SOCIAL IMPACT ASSESSMENT



Why assess my impact?

What are the key steps in an assessment approach?

How much time to set aside? How much of the budget to allocate?

What assistance and financing can I seek?

P10

WHAT IS IT  
ALL ABOUT?

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ORGANISING  
YOUR APPROACH

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OBTAINING  
ASSISTANCE

# SOCIAL IMPACT ASSESSMENT, WHAT IS IT ALL ABOUT?

The pursuit of a positive social impact is central to the purpose of SSE enterprises. This means we must defend the reality that their performance is about much more than just financial results; it is also manifested in the social impact they generate through their actions.

## Core aspects of social impact and its assessment

The term 'social impact' was coined in academic papers on investors' ethical responsibility published by Yale University in the 1970s. This concept later gained ground, particularly in the 1990s, in the field of philanthropy in the English-speaking world, when leading American foundations sought to measure the social returns on their investments.<sup>(2)</sup>

In 2011, the French Council for the Social and Solidarity Economy (CSESS) put forward a definition of social impact:

*"Social impact consists of all the consequences (developments, shifts, changes and disruptions) of an organisation's activities, for its local external stakeholders (beneficiaries, users or customers), both direct and indirect, and its internal stakeholders (employees and volunteers), as well as for society at large."*

*In the area of the social and solidarity economy, it stems from the capacity of an organisation (or group of organisations) to anticipate needs that are partially or wholly unmet, and respond to them through its prevention, repair or compensation missions. It is reflected in aspects such as individual well-being, behaviours, capabilities, sector-wide practices, social innovation and public decision-making."*

note



### SOCIAL UTILITY OR SOCIAL IMPACT?

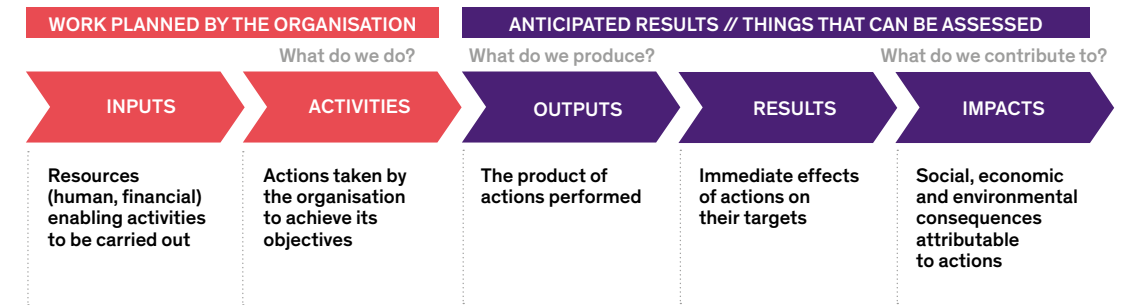
Social utility and social impact both involve putting change at the centre of a project, which sets them apart from corporate social responsibility (CSR) approaches.

While social impact focusses on long-term consequences of actions, social utility also analyses modes of functioning and governance, and values mobilised: the choice between these two concepts depends on the aims and meaning you want to give your assessment.<sup>(3)</sup>

<sup>(2)</sup> TIESS, Social impact measurement: Timeline, [online]: [tiess.ca/mesure-dimpact-social-ligne-du-temps](http://tiess.ca/mesure-dimpact-social-ligne-du-temps)

<sup>(3)</sup> Avise, Culture et Promotion, 'Évaluer l'utilité sociale de son activité. Conduire une démarche d'auto-évaluation' [Assessing the Social Utility of Your Activity. Conducting a Self-Assessment Approach], 2007: [www.avise.org/ressources/evaluer-lutilite-sociale-de-son-activite-conduire-une-demarche-dauto-evaluation](http://www.avise.org/ressources/evaluer-lutilite-sociale-de-son-activite-conduire-une-demarche-dauto-evaluation)

## Impact value chain



Source: EPVA, 'Guide pratique pour la mesure et la gestion de l'impact' [A Practical Guide to Impact Measurement and Management], 2015

Social impact includes all changes – positive and negative, expected and unexpected – brought about by activities and directly attributable to them. From a more operational standpoint, social impact can be viewed as part of a value chain, in which each link contributes to the next.

In reality, the social impacts of activities can be measured in many dimensions, which may differ depending on factors such as sector, size and location. Five main impact types can be identified:

- **Individual:** living conditions, well-being, autonomy, health, etc.
- **Societal:** social links, citizenship, diversity, equality of opportunity, etc.
- **Political:** innovation, public policy, representation of citizens, etc.
- **Economic:** job creation, avoided costs for local authorities, etc.
- **Environmental:** biodiversity protection, reduction of footprints (such as carbon and water), etc.

**Impact assessment is an approach that involves understanding, measuring and valuing your organisation's effects**, whether positive or negative, on its stakeholders and environment. It answers the question, "what are the consequences of my actions and for whom?", taking a view that extends beyond just the economic dimension.

*"There's a systematic dimension to impacts. Our actions have the potential to create an impact that goes beyond residents taken individually: on their participation in neighbourhood life and associations; and on the way that services are delivered."*

**ANNE CHARPY**  
FOUNDER  
VOISINMALIN

## Why assess your social impact?

Social impact assessment makes it possible to analyse an enterprise's contribution to ecological and social transition, and therefore to **put a social value on its actions**. It is complementary to analyses of an enterprise's economic value.

**All SSE enterprises have an awareness of their impact**, although they do not all carry out formal assessments.<sup>(4)</sup> While it is often used to report activities to stakeholders, assessment actually serves a wide range of aims, such as:

- better understanding your environment (the dynamics of other actors, situations of beneficiaries and their changing needs, etc.);
- understanding the effects of your actions on your beneficiaries;
- providing evidence of social value created and your project's relevance;
- improving your practices and driving research into innovative solutions;
- communicating about your actions and strengthening advocacy;
- sustaining sources of finance or seeking new ones;
- recognising and valuing the work of employees and volunteers;
- motivating your teams;
- creating forums for discussion.

Whatever the aim of the approach, **it should be considered from the outset**, so that assessment can serve future decision-making, including by managers, operational teams, partners and financiers. In order to form an integral part of operational management and strategy, the assessment approach also needs to be treated as a long-term component of the organisational model.

Social impact assessment is **also important for actors surrounding enterprises in the SSE**<sup>(5)</sup>:

- Foundations, looking to allocate their funds to the most effective projects;
- Companies, seeking to engage in alliances that have a strong impact;
- Public authorities, having to justify their spending in a tight budgetary environment;
- Investors, needing solid data, based on the existing model for financial performance.

*"Assessment enables us to check that we're having an impact and adjust the actions we put in place. It's an effective management tool."*

**GAËLLE WERKLING**  
DIRECTOR OF INCUBATEUR  
BALUCHON

(4) Avise, 'Expérience de l'évaluation d'impact social' [Experience from Social Impact Assessment], 2017: [www.avise.org/ressources/experience-de-levaluation-dimpact-social-presentation-de-letude](http://www.avise.org/ressources/experience-de-levaluation-dimpact-social-presentation-de-letude)

(5) Avise, ESSEC, Mouvement Impact France, 'Petit Précis de l'évaluation de l'impact social' [A Brief Handbook of Social Impact Assessment], 2013: [www.avise.org/ressources/petit-precis-de-levaluation-de-limpact-social](http://www.avise.org/ressources/petit-precis-de-levaluation-de-limpact-social)

## case study

### BECOMTECH, AN ASSOCIATION WHERE IMPACT ASSESSMENT PLAYS A CENTRAL ROLE

Formed in 2017, BECOMTECH is an association that works at national level (particularly in Île-de-France, Pays de la Loire and Auvergne-Rhône-Alpes) to promote diversity and equality in IT and digital fields. It carries out presentation, training and support actions among teenage girls.

Assisted by the agency Phare, the association started to assess its social impact in 2019, when it had three permanent staff members. The assessment was motivated by several challenges:

- assess the effects and relevance of actions, through an outside perspective;

- establish factual evidence of the impact to satisfy existing project partners and attract new partners;
- develop a sharper understanding of effects produced, in order to determine key action components (as priorities for human and financial resource allocation) and identify project improvement opportunities.

The assessment process, which lasted approximately one year, was supported by analysis of previous assessments and reports produced by the association.

- An in-depth qualitative survey (more than 20 interviews and two observation periods)

was also conducted and a questionnaire was distributed among beneficiaries. This work made it possible to demonstrate BECOMTECH's impact, particularly in terms of helping teenage girls develop digital skills, open up new career paths (in the digital sector, for example) and build their confidence to speak in public, as well as to convey messages and promote changes of perception about digital technology and women's role in the field. The association has now integrated impact indicators in the monitoring of its activities.

**To find out more:**  
[becomtech.fr/notre-impact](http://becomtech.fr/notre-impact)

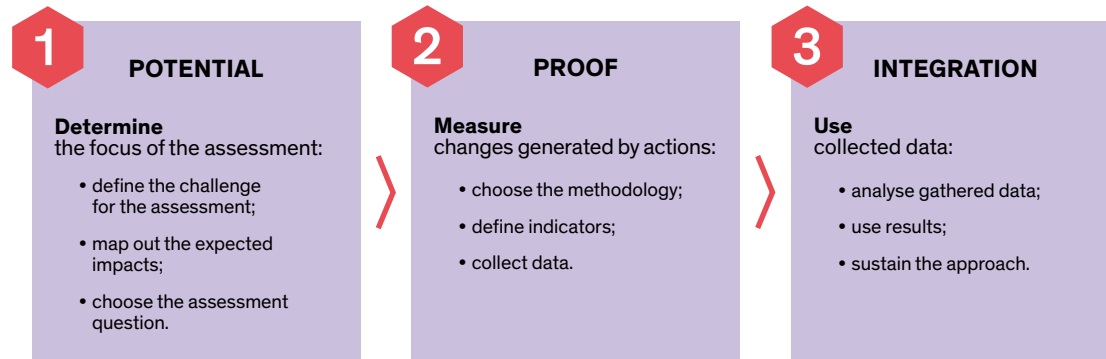
*"With social impact assessment, it's possible to highlight a project's added value for the dynamism of its local area, as well as for beneficiaries, stakeholders and the local ecosystem."*

**SYLVIE BOUVIER**  
SOCIAL AND SOLIDARITY ECONOMY PROJECT MANAGER  
FRENCH NATIONAL AGENCY FOR TERRITORIAL COHESION



## Understand the three key steps

The reasons for conducting a social impact assessment are varied. It can also be initiated at different project stages and involve diverse methodologies. However, we can identify three main steps that are shared by all assessment approaches:



## focus

### AVOID PRECONCEPTIONS!

Impact assessment is not necessarily...

- ... **just to provide accountability:** it is also a way to create a conversation with your partners, develop a clearer understanding of social changes brought about by your activities, improve your practices, give fresh impetus to your teams, assist decision-making, etc.
- ... **just for large organisations:** any organisation can start thinking about the meaning behind its actions and the effects they generate,

and introduce indicators to monitor progress made, whatever its size and however well established it is. The assessment approach can be adapted to available resources.

- ... **a process that leaves people out: quite the opposite!** The aim is to illuminate and magnify effects generated for people or society as a whole. Involving stakeholders throughout the process, particularly beneficiaries, is actually one of the keys to success.

- ... **complicated:** the fear is understandable, as there seems to be no consensus on a single method and the process takes time, resources and expertise, but assessment is above all an approach that requires careful preparation. By determining why you want to adopt the approach and allocating time to scoping, you can choose a method that meets your needs and situation.

**To find out more:** Avise, ESSEC, Mouvement Impact France, *'Petit Précis de l'évaluation de l'impact social'* [A Brief Handbook of Social Impact Assessment], 2013

# ORGANISING YOUR APPROACH

**How to begin assessing your impact in practical terms? Which resources and how much time need to be allocated to an assessment? How to initiate the approach operationally?** Here are some good practices and reference points to help you organise your assessment approach.

## Getting people on board

While the utility and benefits of assessment are generally well understood today, it is not always clear how to operationally launch the approach within an organisation. It may be met with resistance for different reasons, such as fear of having one's work judged, complexity of implementation, or insufficient prioritisation in terms of available time and resources.

When launching an impact assessment, it is good practice to mobilise ambassadors for the approach. To do this:

- 1 Identify a first circle of individuals,** who have some influence and show enthusiasm for your assessment project, within your organisation or among your partners.

Begin with a limited number of ambassadors (between one and three) to concentrate your efforts. If necessary, you can increase their number later, by adding concentric circles:

- within your organisation, including members of general management or governing bodies, as well as operational managers;
- among your partners, such as a strategic financial partner, with which you are building a relationship of trust.

*"The assessment enabled us to reconstruct our association's project in a collective way, and remobilise teams and partners around the project."*

**NADÈGE MONIEZ**  
DEPUTY DIRECTOR  
JOSÉPHINE



2

**Share your initial thoughts with these ambassadors**, particularly concerning your motivations for adopting an assessment approach and what you expect it to contribute.

It is a good idea to inform them about the topic, particularly by emphasizing the various objectives that can be pursued through the approach, beyond providing accountability to stakeholders, as well as the main methodological aspects presented in this guide.

3

**Plan time for discussions with your ambassadors**, to promote the collective dimension of the approach and sketch out ideas about the assessment's purpose and aims, available resources, actors that can provide assistance, etc.

It is also a good idea to seek out inspiring examples of other SSE enterprises (ones that operate in a similar field to yours, for example). You can contact them to get further details about their assessment approach: these can serve as inputs to launch your own approach and bring your stakeholders on board.

These ambassadors can then help you promote the approach among other stakeholders, to develop wider engagement. It may well be necessary, in turn, to inform these new audiences about the topic, but you will be able to rely on your ambassadors to support you with the task.

Remember to also prepare at least one presentation of the project and the approach for all of your teams, before the assessment begins, so that they feel fully involved and do not experience the assessment as an imposition: focus on the project's evolving and collective nature; and remind your stakeholders that they will be involved at each step.

## Setting the budget and time frame

### How much of the budget to allocate?

It is not easy to precisely identify costs generated by social impact assessment, particularly internal costs (teams' contributions, mobilisation of partners, etc.). The cost of an assessment approach varies according to how ambitious it is; and this ambition should be adjusted to take into account requirements and available human resources, time and funds.

As a guide, it is recommended to **allocate no more than 15% of a project's budget to social impact assessment**. In the case of external assistance, the cost varies according to the actors involved: for example, while assistance via the DLA (*Dispositif local d'accompagnement* – local support scheme for the SSE) and the use of voluntary work or skills sponsorship is free, hiring a specialist consultancy firm requires a budget of € 15 to 20K for a basic level of assistance (see more actors on p.22).

### What is the necessary time frame?

It is essential to view social impact assessment as a long-term process: it requires a period of assimilation and preparation; and it should be rolled out gradually and continuously. In addition, assessment must take into account the period between the time when actions are implemented and the time when their impacts are observed.

An assessment approach can be launched at any stage in the life of a project or organisation, and the earlier on the better. Launching **an initial assessment takes at least six months, but generally extends over a period of one to two years**. This can be even longer depending on how ambitious it is, available resources, potential constraints related to the project and methods employed.

As an example, an assessment of the social utility of social mediation launched in 2007 by the DIV (*Délégation interministérielle de la ville* – interministerial delegation for urban policy) lasted 12 months.<sup>(6)</sup> Impact assessment of the Uniterres project, initiated in 2014 by the ANDES network, required a full 3 months for data analysis to be completed, as data was available in advance.<sup>(7)</sup> Most of the assessments carried out by Croix-Rouge Française (the French Red Cross) have lasted between 9 and 12 months.

"Social impact assessment is within everyone's reach, particularly because the approach is just as important as the result. It generates very rewarding collective thinking and effort. Everybody can get started, even though, depending on available resources, not everybody will be able to produce the same results."

**MARIE-AGNÈS TUR**  
HEAD OF THE SOCIAL IMPACT  
MEASUREMENT DIVISION  
CROIX-ROUGE FRANÇAISE

(6) Avisa, case study 'Évaluation de l'utilité sociale de la médiation sociale' [Assessment of the Social Utility of Social Mediation], 2016; [www.avise.org/ressources/evaluation-de-lutilite-sociale-de-la-mediation-sociale](http://www.avise.org/ressources/evaluation-de-lutilite-sociale-de-la-mediation-sociale)

(7) Avisa, case study 'Mesurer l'impact économique local d'un projet' [Measuring a Project's Local Economic Impact], 2017; [www.avise.org/ressources/evaluation-de-limpact-economique-local-dun-iterres](http://www.avise.org/ressources/evaluation-de-limpact-economique-local-dun-iterres)

## Identifying available resources and constraints

Before getting started, it is important to identify what resources are available and the potential constraints for your project. The assessment approach will be very different depending on whether you have 3 months or 2 years to carry out your assessment, whether your team has 1 or 5 members, and whether they are partially or fully dedicated to the process!

Ask yourself the following questions in particular:

- **What are the strategic deadlines** for the project and the assessment approach (board meeting, search for partnerships, etc.)?
- **Is there a dedicated budget** (number of person-days, hiring an external consultant, etc.)?
- **What support or resources can I mobilise** to assist me in the approach (team, operational partners, volunteers, assistance providers, financiers, etc.)? For which parts of the approach?

Furthermore, it is important, as early on as possible, to look into existing elements that could be of use in your assessment approach: operational management tools, satisfaction surveys already conducted among your beneficiaries, assessments carried out by other organisations in a similar field, etc. This can have an influence on the means and resources that you will need to mobilise.

read



### AVISE CASE STUDIES

Comprehensive approaches, qualitative, quantitative, monetary methods, etc.

Drawing on experience from the field, Avise provides several case studies that illustrate the implementation of these methods, while offering feedback and learnings.

Available at:  
[www.avise.org](http://www.avise.org)

# OBTAINING ASSISTANCE

**Who are the leading actors in the area of social impact assessment? Which steps in the approach should you seek assistance for?** Here is a selection of resources and schemes that can meet your training, assistance and financing needs for social impact assessment.

## Should you carry out the approach internally or externally?

You can choose to conduct your assessment internally or to outsource all or part of the process. You could, for example, define what it is that you want to assess (such as expected effects of your activities on stakeholders) internally, and then outsource the collection of data. Or, you could call on an external service to help you define what you want to assess and develop collection tools, and then mobilise your internal teams to collect the data. This choice depends on your organisation and the human and financial resources at your disposal: **in practice, most assessment approaches combine internal and external work.**

In any case, it is essential to identify a person to be in charge of monitoring the approach and mobilising stakeholders. If the approach is carried out internally, that person will also be responsible for its implementation. If the approach is outsourced, they will simply be the main contact point for the service provider.

### Carrying out your assessment approach internally

By carrying out the approach internally, you can limit spending, since the main part of the cost will be time spent by your teams on the project. However, care should be taken to estimate the necessary workload (which can be significant) and available capacity, so that your activities are not negatively impacted by assessment work. You should also plan for some external spending, such as for the development of collection tools, purchasing of software licences, travel by your teams, etc.

*"One of the major benefits of carrying out the approach internally is to unify a group behind a shared goal. This also helps to better guide your strategy, to coordinate your actions and, in a very practical sense, to establish regular gathering of indicator data."*

**LAËTITIA RUILIER**  
SOCIAL INNOVATION OFFICER  
HABITAT DES POSSIBLES

By carrying it out internally, you can also have greater ownership of the assessment approach and sustain it over the long-term. It makes it simpler to enhance the assessment with your knowledge of the challenges and constraints, as well as the environment of your organisation and sector. If you opt for the internal option, however, you will need to step back to get some perspective on your activities, expected impacts and interpretation of results.

### Carrying out your assessment approach externally

By outsourcing the approach, you can put less demands on your teams. However, an external assistance provider will not be able to replace your teams for all steps, and it will be essential to involve them at various points during the process:

- **before the launch**, to clearly define the assessment's context, challenges and potential constraints, as well as to establish what you want to assess (identification of effects, impacted stakeholders, etc.);
- **throughout the approach**, to ensure the relevance and coherency of implemented work (collection methods and tools used, overall schedule, etc.);
- **at the end of the assessment**, to accurately interpret the results, and then to ensure relevance in the way they are communicated (which results to communicate and how?) and used internally (do we need to change the way we operate and how?).

By outsourcing your assessment approach, you can get an objective vision of your project, greater certainty about performance deadlines and clearly defined deliverables, as they are established in a contractual framework. Turning to an assistance provider, which plays a neutral role as a facilitator, can also make it easier to mobilise your stakeholders and encourage expression of thoughts. External expertise contributed by a service provider can also increase the legitimacy of your assessment process.

**Whether you decide to opt for an internal or external approach**, your teams will be involved, so it is important to plan for the workload in their schedules.

*"Getting assistance was also a way for us to become more proficient at performing assessments: we developed skills and tools to then be able to carry out an assessment ourselves."*

**DOROTHÉE ROCH**  
CO-FOUNDER AND DIRECTOR  
BECOMTECH



## case study

### JOSÉPHINE, AN ASSESSMENT COMBINING INTERNAL MOBILISATION AND EXTERNAL ASSISTANCE

Founded in 2006 and present in Paris, Moulins and Clermont-Ferrand, Joséphine is an association that offers beauty and well-being treatments for women in vulnerable situations. This helps them rebuild confidence and the motivation to integrate into society and develop a career. In 2017, the association adopted an approach to assess their social impact, with the main aim of better understanding changes generated by their activities: *what really happens for women when they come to Joséphine, and what are the key practices that generate these changes?*

Initiated during a phase of change for the association, the approach was also aimed at uniting the teams and partners around the association's project and consolidating the offering. Several workshops and individual interviews were conducted internally, involving beneficiaries, employees, volunteers and partners, in order to describe the effects of the association's work on its stakeholders. The association was then assisted by GRÉUS (*Groupe de recherche-action sur l'Évaluation de l'utilité sociale* – research-action group for social utility assessment), in order to validate these initial results and launch the next part

of the approach (particularly the measurement phase). Joséphine's teams remained highly engaged in the process (overall organisation, creation and running of workshops, production of materials, etc.). A steering committee, formed of individuals with thorough knowledge of Joséphine's activities and a key role in the organisation, was also created to monitor progress with the approach. The assessment lasted 18 months and used approximately 0.7 of a full-time equivalent internally.

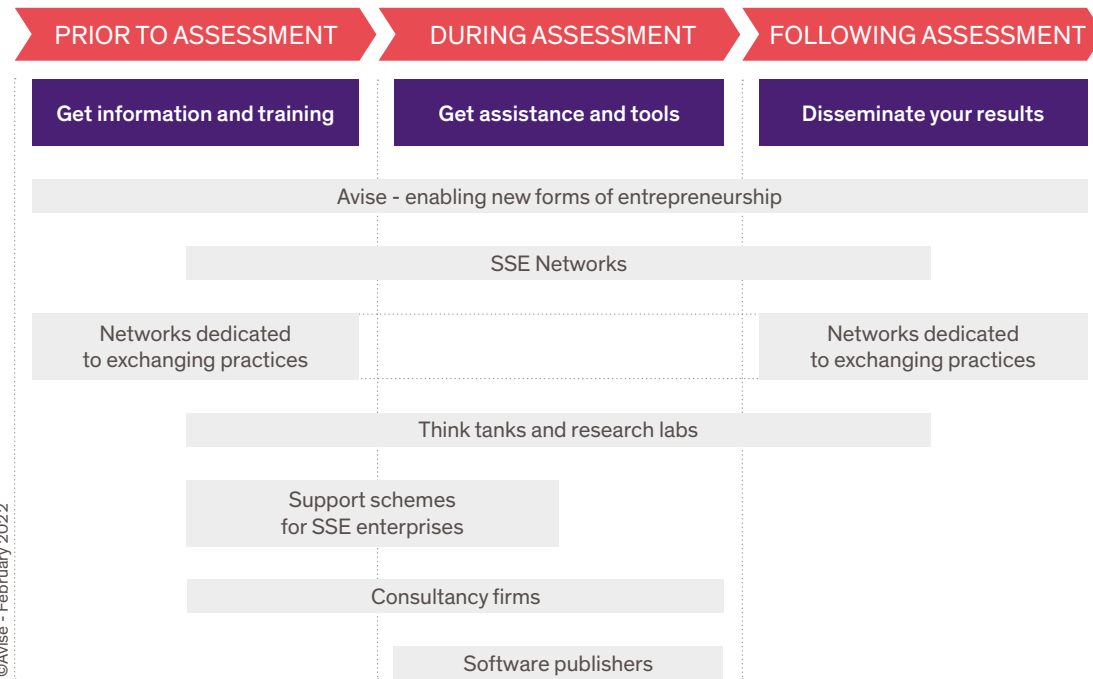
**To find out more:**  
[www.association-josephine.fr/lassociation](http://www.association-josephine.fr/lassociation)

## Assistance providers and financiers

Many actors are available to assist you according to your needs: to provide information, training and tools; to share your learnings; etc.

You will find examples of some of these actors below. A full mapping of the leading social impact assessment actors is available at [avise.org](http://avise.org).

### MAPPING OF SOCIAL IMPACT ASSESSMENT ACTORS



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"It is important to take the time to select an assistance provider: we talked with various consultancy firms several times, in order to clearly understand their proposed methods, ways of working, values, etc. This also enabled us to more accurately frame our request."

**DOROTHÉE ROCH**  
CO-FOUNDER AND DIRECTOR  
BECOMTECH

### Information

- **The national resource centre for social impact assessment**, run by Avise: here you will find information about definitions, methodologies and select resources available in English.  
> [www.avise.org/evaluation-impact-social](http://www.avise.org/evaluation-impact-social)

### Training (in France)

- **MOOC on social impact measurement and assessment**, provided by ESSEC Impact Initiative (the course can be followed for free).  
> [impactinitiative.essec.edu](http://impactinitiative.essec.edu)
- **Introduction to social impact assessment online**, provided by Admical and Kimso (fee-paying course).  
> [admical.org/formations](http://admical.org/formations)
- **Assimilation modules** provided by SSE support actors, such as the DLA (local support scheme for the SSE) and Communauté Émergence & Accélération.  
> [www.avise.org/entreprendre/se-faire-accompagner](http://www.avise.org/entreprendre/se-faire-accompagner)
- **Courses** provided by specialist consultancy firms.

### Assistance (in France)

- **Take part in a dedicated assistance programme**, such as 'Size Up', run by Antropia ESSEC and Ronalpia.
- **Contact the DLA**, a free public scheme, which provides bespoke support for employer organisations in the SSE, including in the area of social impact assessment.  
> [www.info-dla.fr](http://www.info-dla.fr)
- **Make use of skills-sharing schemes** (assignments are organised by Pro Bono Lab), or create placements for students.
- **Call on an expert or consultancy firm**, such as one of the members of the Social Value France network (see focus on p.25).
- **Cooperate with universities and research centres**, such as: Laboratoire E&MISE (social and environmental impact measurement and assessment) at ESSEC Business School; GRÉUS (research-action group for social utility assessment) at ICP (Catholic University of Paris); Institut Jean-Baptiste Godin, etc.

**Several SSE networks**, such as Le Mouvement Associatif and UDES (*Union des employeurs de l'économie sociale et solidaire* – Union of employers in the social and solidarity economy), have also developed a range of services for their members.

"We are recruiting motivated volunteers to provide occasional assistance with the assessment of our social impact. They help us, for instance, with carrying out interviews among our stakeholders and analysing quantitative data."

**MARIE-AGNÈS TUR**  
HEAD OF THE SOCIAL IMPACT  
MEASUREMENT DIVISION  
CROIX-ROUGE FRANÇAISE

## Financing

In recent years, financiers have been developing new ways to assist and finance the carrying out of assessments:

- an increasing number of **philanthropy actors** and **foundations** are setting aside funds for the implementation of assessment approaches;
- the growth of **solidarity finance** and increasing development of **impact investors** are encouraging assessment approaches in financed projects;
- **public bodies** and **local authorities** are experimenting with specific approaches to support social innovation actors.

New solutions, such as the setting up of funds dedicated to this type of approach, have yet to be explored however.

*"Assessment can be perceived as a constraint, particularly when it's imposed by a financier, but it's actually an opportunity to take a step back from our actions and reconsider fundamental questions."*

**GAËLLE WERKLING**  
DIRECTOR OF INCUBATEUR  
BALUCHON

## focus

### AVISE, AN ACTOR ENGAGED FOR THE DEVELOPEMENT OF SOCIAL IMPACT ASSESSMENT

For more than 20 years, Avise has been working to develop a shared culture of social impact assessment, and enable all SSE enterprises to assess their impact. In addition to running the national resource centre for social impact assessment, it leads three structure-building actions to support the development of assessment approaches.

#### Social Value France, a network for exchanges about social impact assessment

Since 2015, Avise has been running Social Value France, an open network bringing together more than 150 people from various backgrounds, with a shared interest in the topic of impact assessment. Through regular meetings, the network provides a forum to compare views about assessment,

share good practices, and discuss academic research and news in the area of social impact assessment. Aiming to broaden the scope of thought and highlight debates about assessment beyond its national borders, Social Value France is affiliated with Social Value International.

**To find out more:**  
[www.avise.org/evaluation-impact-social/accompagnements-et-financements/le-reseau-social-value-france](http://www.avise.org/evaluation-impact-social/accompagnements-et-financements/le-reseau-social-value-france)

#### Cap Impact, a programme created by Avise to train actors providing assistance for the SSE

In 2020, Avise launched the Cap Impact programme with the aim of developing skills among actors providing assistance with social impact assessment. On average, approximately 50 organisations,

including SSE incubators and branches of the DLA, are trained each year in this area. They are now prepared to assist you in the early thought stages!

**To find out more:**  
[www.avise.org/evaluation-impact-social/accompagnements-et-financements/zoom-le-programme-daccompagnement-cap](http://www.avise.org/evaluation-impact-social/accompagnements-et-financements/zoom-le-programme-daccompagnement-cap)

#### Avise's calls for social impact assessment projects

Through the European Social Fund Plus (ESF+), Avise co-finances innovative projects aimed at developing social impact assessment practices. 16 projects received support between 2017 and 2021, to develop innovative approaches or assistance programmes for SSE enterprises. These included: Coopérer pour Entreprendre (network supporting cooperative entrepreneurship), Croix-Rouge Française (French

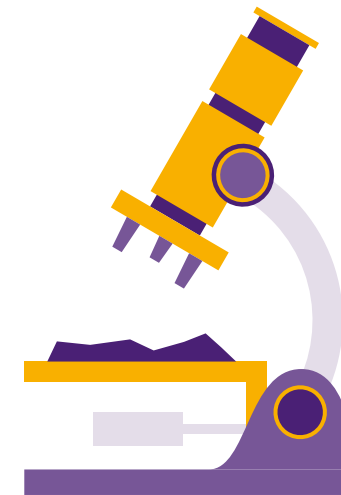
Red Cross), UNAPEI (network promoting access for people with disabilities), CRESS Bretagne (regional chamber of the social and solidarity economy for Brittany), Énergie Partagée (movement supporting renewable energy), France Active (network supporting entrepreneurship), UDES (union of employers in the social and solidarity economy), and others. You can find all of the selected projects on the portal [avise.org](http://avise.org)!

**To find out more:**  
[www.avise.org/avise-organisme-intermediaire-fse](http://www.avise.org/avise-organisme-intermediaire-fse)



# 2

## **DETERMINE** THE FOCUS OF THE ASSESSMENT



What will your assessment be used for?  
What are the expected impacts of your project and who do they concern?  
What question will your assessment try to answer?

P30

DEFINE THE  
STRATEGIC  
AIM OF YOUR  
ASSESSMENT

P32

REVIEW YOUR  
MISSION AND  
STAKEHOLDERS

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MAP OUT YOUR  
PROJECT'S  
EXPECTED  
IMPACTS

P41

CHOOSE YOUR  
ASSESSMENT  
QUESTION



# DEFINE THE STRATEGIC AIM OF YOUR ASSESSMENT

Before getting started, it is crucial to think about why you want to launch an assessment approach: your motivations may be varied!

## The aims of an impact assessment

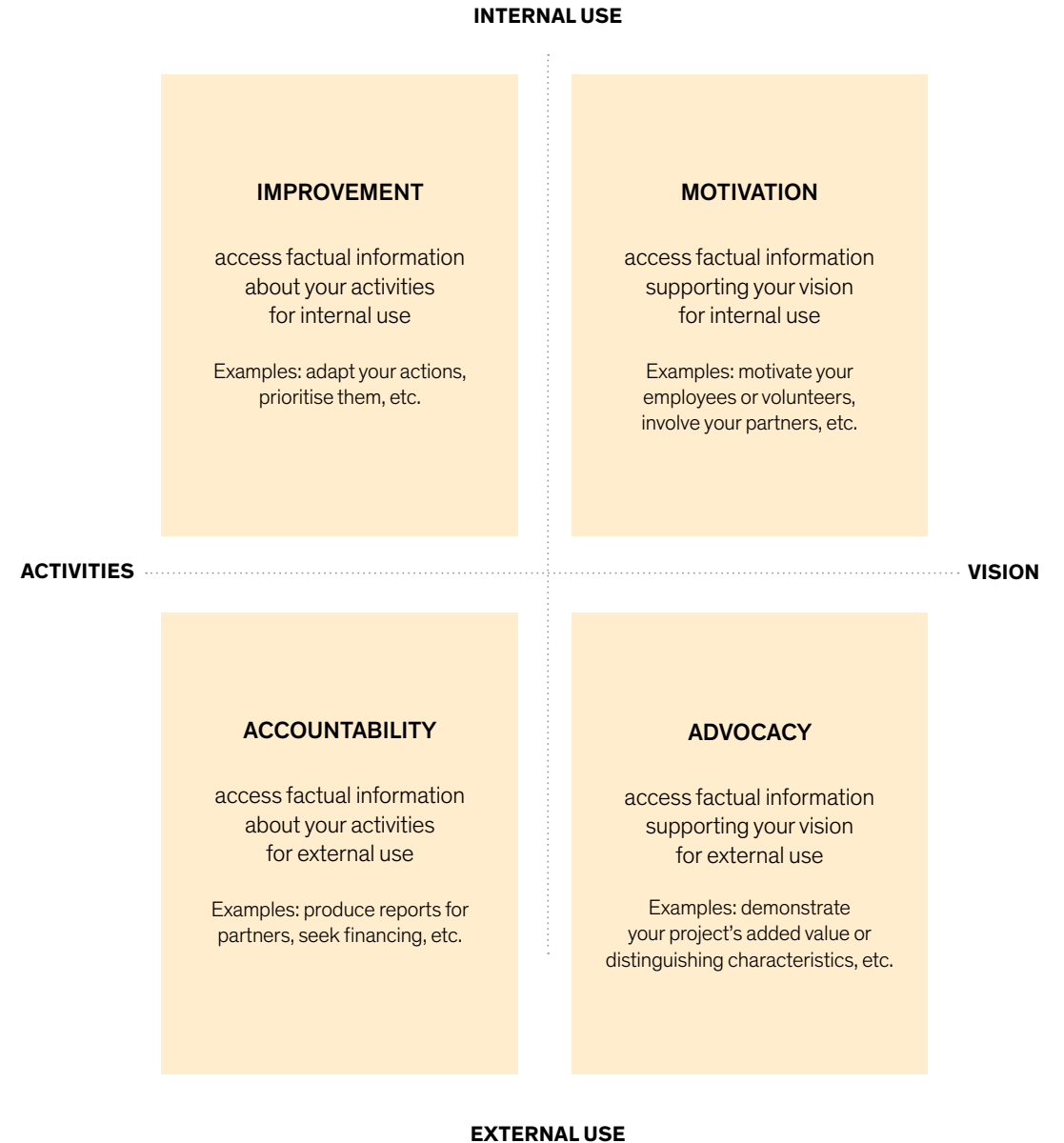
You will often be pursuing several aims at once. It is important though to identify the principal reason for your assessment, because **this will influence your choice of method**.

Similarly, it is important to think more specifically about the **audience of your assessment** (who is it intended for?) and what they expect from it: this will enable you to implement an approach that will meet your aims in a relevant way.

We can identify **four types of strategic aims** for impact assessment: improvement, motivation, accountability and advocacy (see diagram opposite).

*"Assessing the actions of VoisinMalin involves constantly questioning what we do, to serve as a compass that guides our actions. It was important to measure our impact in the field, in order to verify our utility and avoid being just another initiative, or an initiative that doesn't work."*

**ANNE CHARPY**  
FOUNDER  
VOISINMALIN



# REVIEW

## YOUR MISSION AND STAKEHOLDERS

The assessment approach asks questions of an organisation's project by analysing its effects and the changes it generates for its stakeholders. Before beginning to measure your impact, it is therefore crucial to set out your "impact promise", i.e. **the assumed or expected effects on your project's stakeholders**.

To do this, we recommend taking the time to **review the mission** pursued by the project, the activities implemented to achieve it, and the **stakeholders involved**. This work will enable you to then identify the expected impacts of your project.

### Define your social mission and activities

**The social purpose, or social mission**, defines the goals set by the organisation and the reason for its engagement: this forms the basis for the organisation's interest in taking action and will make it possible to achieve the project's vision.

To contribute to its social purpose, the organisation sets itself a number of **objectives** to attain. These are often defined as part of a strategic plan.

Lastly, the organisation commits human and financial resources, which it mobilises in the form of **activities**, to reach these objectives.

**Bear in mind:** in the case of a "first steps" assessment, it is possible that not all of the activities that you list in this step will be assessed at a later stage.

## read



The guide '*Se lancer dans l'entrepreneuriat social*' [Starting out in social entrepreneurship], produced by Avisa in 2020, provides key information and methodological advice to understand and clearly define your vision, social purpose and operational objectives.

Available at:  
[www.avise.org](http://www.avise.org)

## case study

### The mission of Ferme du Parc des Meuniers

Ferme du Parc des Meuniers is a non-profit organisation, certified for its youth education work (*Jeunesse Éducation Populaire*). It promotes social links and respect for differences in Val-de-Marne, near Paris. It is multi-functional, operating as an educational farm, a social centre, a dynamic integration space (providing vocational training) and a free public venue open to all, six days of the week. It welcomes a diverse audience, including young, retired, working and disabled people, families, institutions and visitors. The organisation launched an assessment approach in its 25<sup>th</sup> year, in order to promote its social impact among both internal and external stakeholders. It received assistance with the approach from the Val-de-Marne branch of the DLA, within the framework of the Cap Impact programme.

#### SOCIAL PURPOSE

The purpose of the association La Ferme du Parc des Meuniers is to act as a resource centre serving social links and solidarity, and to develop tools that support:

- education and welcoming of all sectors of the population;
- integration of disadvantaged groups (youth and adults);
- local development of the social and solidarity economy;
- implementation of sustainable development projects.

#### OBJECTIVES

- Develop a resource centre, built for, by and with residents
- Recreate social links and prevent fragmentation in society
- Run a community hub that serves sustainable development

#### ACTIVITIES

- Run a social centre, a socialising space and melting pot of ideas
- Organise gatherings that are open to all (meetings, debates, awareness-raising sessions, working groups, etc.)
- Implement activities created by and for residents and integration scheme participants: vegetable growing activities, cookery workshops, etc.
- Provide training for integration scheme participants
- Run a sponsorship system, to create intergenerational links and transmit knowledge

## Map out your stakeholders

A project's activities, and the resulting impacts, are aimed at one or more stakeholders. Defining your stakeholders is an integral part of your assessment approach, in order to:

- identify your project's interactions and describe their characteristics;
- develop an initial understanding of your impact's mechanisms;
- identify who to include in your assessment approach.

First, it is essential to list your project's stakeholders as exhaustively as possible, in order to establish the most accurate vision of your project, even though some may not be analysed in further detail at later stages.

To list your stakeholders, you can use the typology below as a guide.

- **Beneficiaries:** actors targeted as the project's end beneficiaries, both direct and indirect.
- **Employees:** actors employed by the organisation, who implement the project.
- **Volunteers:** actors volunteering for the organisation, who contribute to implementation of the activities.
- **Administrators:** members of the project's governance bodies.
- **Partner organisations:** the project's operational or strategic partners (companies, other associations, residents, etc.).
- **Financers:** public or private actors providing financial support for the project.
- **Environment:** parts of your environment that your actions have an impact on (local area, air and water quality, etc.).

Once you have listed your stakeholders, it is useful to **specify to what extent each of them contributes to or benefits from your activities**, bearing in mind that a stakeholder can be both a contributor and a beneficiary. Next, you will probably want to focus on stakeholders that are the most involved in your project, as either contributors or beneficiaries.

## note



### STAKEHOLDER

The stakeholder of an organisation refers to any individual or group of individuals that contributes to the organisation's activities (employees, volunteers, financers, suppliers, etc.) or is affected by them (customers, direct or indirect beneficiaries, partners, local area, etc.)

## tool

# Map out your stakeholders

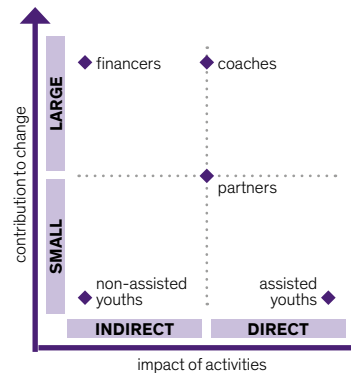
This tool provides a simple way to map out your stakeholders, by answering two questions for each of them. The illustration provided for this tool is inspired by a project that assists young people neither in employment nor in education or training (NEETs). It is run by the Belgian scheme 'Jeugd en Stad' (JES – Youth and City), which aims to help young NEETs access the job market.

### Mapping tool

- To what extent does **X** enable us to implement our activities?
  - **X** does not contribute to carrying out the activity: give a score of 0
  - **X** is needed to successfully carry out our activities: give a score of 3
  - Without **X**, it would be impossible to implement our activities: give a score of 5
- To what extent does **X** benefit from our activities?
  - Without our activities, **X**'s situation would not change: give a score of 0
  - **X**'s situation is changed by our activities: give a score of 3
  - The change in **X**'s situation is strongly linked to our activity: give a score of 5

In this tool, your stakeholders are represented by a short label. In reality, it is useful to detail, as accurately as possible, who the actors are and what your relationships with them are (including how they are involved in or impacted by the project more specifically, and whether you have a close relationship with them).

### Illustration with a youth vocational integration scheme



**Beneficiaries:** assisted young NEETs (18 to 30 years old)

- Do not contribute to carrying out the activities: score = 0
- The change in their situation is strongly linked to the activities: score = 5

**Employees:** coaches assisting the young NEETs

- Without them, it would be impossible to implement the activities: score = 5
- Their situation is changed by the activities: score = 3

**Partners:** institutional actors providing employment assistance

- Are needed to successfully carry out the activities: score = 3
- Their situation is changed by the activities: score = 3

**Financers:** local authorities partnered with the project

- Without them, it would be impossible to implement the activities: score = 5
- Without the activities, their situation would not change: score = 0

**Others:** non-assisted youths close to the beneficiaries

- Do not contribute to carrying out the activities: score = 0
- Without the activities, their situation would not change: score = 0

### Other mapping tools are available:

- according to your stakeholder types: internal, connected or external ('*Guide de la mesure d'impact social*' [Guide to Social Impact Measurement], Fondation Rexel, Improve, 2015): [www.avise.org/ressources/guide-de-la-mesure-dimpact-social](http://www.avise.org/ressources/guide-de-la-mesure-dimpact-social)
- according to the proximity of stakeholders with your project ('*Ceci n'est pas un guide*' [This Is Not a Guide], VISES, 2020): [www.avise.org/ressources/ceci-nest-pas-un-guide-une-publication-du-projet-vises-sur-levaluation-dimpact-social](http://www.avise.org/ressources/ceci-nest-pas-un-guide-une-publication-du-projet-vises-sur-levaluation-dimpact-social)
- according to the kind of relationship ('*Comment mesurer l'impact d'un projet alimentaire ?*' [How to Measure the Impact of a Food Project], Fondation Daniel & Nina Carasso, 2019): [www.avise.org/ressources/comment-mesurer-limpact-dun-projet-alimentaire](http://www.avise.org/ressources/comment-mesurer-limpact-dun-projet-alimentaire)

# MAP OUT YOUR PROJECT'S EXPECTED IMPACTS

Based on the review of your missions and activities, as well as the analysis of your stakeholders, you can now map out the effects that you would like to produce through your activities.

## What is it all about?

This mapping of expected impacts is an initial theoretical approach that will enable you to **better understand how your activities can generate change**, and to identify actions that make the largest contribution, which will therefore be the most relevant to measure.

This mapping is a schematic representation that needs to be **sufficiently simple to be clear, while not oversimplifying** the real situation. It is an iterative process, in which it is essential to involve your stakeholders!

As a reminder, when it comes to a "first steps" assessment, it is possible that not all of your organisation's activities will be assessed. In this case, it is important at this stage to identify which activities will be included in the assessment: these are the activities that will be concerned by this mapping step.

## How to map out your impacts?

- Identify stakeholders to be mobilised to carry out this mapping and those to be mobilised for its approval
- List the activities that you are implementing (see page 32)
- List your activities' stakeholders (see page 34)
- Identify the expected effects:
  - either by beginning with the activities and then, for each one, identifying at least one effect on one or more stakeholders;

*"The assessment enabled us to determine the impact sought by our activities in a concrete manner, by precisely defining the meaning of "assist a project owner", "contribute to structuring a sustainable food sector", and "our contribution to change", for example."*

**GAËLLE WERKLING**  
DIRECTOR OF INCUBATEUR  
BALUCHON

- or by beginning with the stakeholders and then, for each one, identifying all of the effects and the activity that generates them;
- Group together the effects to identify categories
- If possible, position these effect categories according to the time frame (short, medium or long-term)
- Approve the mapping with several stakeholders.

## case study

### EXPECTED EFFECTS FOR A YOUTH VOCATIONAL INTEGRATION SCHEME

Following on from the previous example, this mapping is one that could be carried out by the scheme 'Jeugd en Stad' (JES – Youth and City) for the following actions: individual interviews to motivate participants, group sessions to present the job market, CV writing workshops, recruitment interview simulations.

EFFECTS OF THE PROFESSIONAL SKILLS COACHING ACTIVITY			
SHORT TERM	MEDIUM TERM	LONG TERM	
<b>Rebuild confidence</b> <ul style="list-style-type: none"> <li>• Improve self-esteem</li> <li>• Develop trust in others</li> <li>• Regain confidence in the future</li> </ul>	<b>Integrate into the workforce</b> <ul style="list-style-type: none"> <li>• Formulate a career plan</li> <li>• Have the ability to search for a job</li> <li>• Apply to job offers</li> <li>• Land a job</li> </ul>	<b>Make your first work experience a success</b> <ul style="list-style-type: none"> <li>• Commit to your job</li> <li>• Define objectives to attain</li> <li>• Monitor the objectives</li> </ul>	<b>Lastingly integrate into society</b> <ul style="list-style-type: none"> <li>• Remain in employment</li> </ul>



# case study

## EXPECTED EFFECTS FOR FERME DU PARC DES MEUNIERS

As part of its integration programme, Ferme du Parc des Meuniers assists its beneficiaries in carrying out vegetable growing and cookery workshop organisation activities.

EFFECTS OF THE VEGETABLE GROWING AND COOKING WORKSHOP ORGANISATION ACTIVITIES		
SHORT TERM	MEDIUM TERM	LONG TERM
<ul style="list-style-type: none"> <li>• Transfer of practical knowledge (market gardening, food)</li> <li>• Giving people recognition for their skills</li> <li>• Access to vegetable produce at a low cost</li> <li>• Companionship (sharing of seeds, shared meals)</li> <li>• Creating interactions with external audiences</li> </ul>	<ul style="list-style-type: none"> <li>• Development of vocational skills (market gardening, catering)</li> <li>• Building of belief in one's self and skills</li> <li>• Improvement in diet</li> <li>• Exchanges and sharing with external audiences</li> </ul>	<ul style="list-style-type: none"> <li>• Access to training and jobs</li> <li>• Improvement in physical and mental health</li> <li>• Improvement in social links and increase in social diversity</li> </ul>



# tool

## THEORY OF CHANGE

To go a step further, you can identify cause-effect links between mapped out effects: this is the theory of change approach.

Resources are available:

- *Repères sur les théories du changement* [References for Theories of Change], published by F3E and COTA (2012) [online]: [f3e.asso.fr/wp-content/uploads/reperes\\_toc\\_v4.pdf](https://f3e.asso.fr/wp-content/uploads/reperes_toc_v4.pdf)
- A summary of theory of change, produced by TIESS (Territoires innovants en économie sociale et solidaire) [online]: [tiess.ca/wp-content/uploads/2020/08/TIESS\\_fiche\\_ToC\\_3.pdf](https://tiess.ca/wp-content/uploads/2020/08/TIESS_fiche_ToC_3.pdf)

## Advice and points for attention

This mapping should enable you to identify the main expected effects of your project, while not oversimplifying the real situation.

With this in mind, make sure to:

- **set a realistic scope**, as the aim is not to be as exhaustive as possible, but to be as relevant as possible;
- **distinguish between activities** (what you do), practices (how you do it) and effects (results of activities and practices);
- **involve your stakeholders** in this process, in order to establish a global vision of your actions.

By completing these various tasks and producing a map of your impacts, you can clarify your intentions for the project and the vision you uphold.

**It is entirely possible to stop here for now and consolidate these learnings**, in order to specify your practices, bring your stakeholders on board, develop elements of your advocacy, etc. Measurement of the effects can be done at a later stage, according to your resources and situation.

"The work we put into describing effects enabled us to gain a better understanding of how Joséphine's actions help women rebuild self-confidence, and to develop effective and relevant communication materials."

**NADÈGE MONIEZ**  
DEPUTY DIRECTOR  
JOSÉPHINE



## focus

### INVOLVE YOUR STAKEHOLDERS THROUGHOUT YOUR ASSESSMENT

One of the keys to a successful assessment, which is often highlighted, is the involvement of stakeholders. Here are four reasons to effectively involve them in your approach:

1

**Identify key activities to assess** (those that really count and create your project's value) and possibly identify new impacts!

2

**Ensure that the approach and tools deployed** make it possible to achieve your assessment's objectives and are relevant to your targets.

3

**Develop a detailed and shared analysis** of your results (a variety of viewpoints contributes to the richness and subtlety of interpretations) and manage any changes in your organisation (following the results of the assessment).

4

**Generate a collective dynamic** around your project, help your partners get involved, and give them a more sophisticated and shared understanding of your activities.

## case study

### HABITATS DES POSSIBLES, THE CENTRAL ROLE OF STAKEHOLDERS IN THE ASSESSMENT

Founded in Gironde in 2016, Habitat des Possibles is an association that aims to help rural municipalities create shared and assisted homes for retired people, with the participation of local residents. The association initiated an assessment of its social impact in 2019, with a dual aim: on the one hand, to describe and define the value created by its shared homes (in terms of psychosocial, social, health and economic dimensions); on the other, to demonstrate the association's utility to financiers, to allow it to consolidate and grow. The assessment tasks were carried out internally, with the recruitment of a social innovation officer. The objectives were to produce a methodology that could be duplicated by other organisations

and to get stakeholders accustomed to social impact assessment. Stakeholder involvement was a central part of the approach: assessment criteria and indicators were identified along with beneficiaries, volunteers, employees and elected representatives, through collective meetings and online interviews. This made it possible to identify new effects on beneficiaries (such as the development of a sense of group belonging, and inclusion of future residents in a citizen engagement project for the common good), as well as new indicators, including one related to the sense of security (for both the residents and their loved ones), which was suggested by a beneficiary and a project partner. These criteria were

then approved by a multi-disciplinary steering committee, with members including academics (in the fields of sociology of housing, psycho-gerontology, economics, etc.), non-profit representatives and project financiers. In 2020, following initial data collection, a first social utility measurement report was produced. The association is now working on integrating this data collection into its activities (particularly when new shared homes are opened), in order to enable regular monitoring of indicators and the impact generated by the project.

**To find out more:**  
[www.habitatsdespossibles.org](http://www.habitatsdespossibles.org)

# CHOOSE YOUR ASSESSMENT QUESTION

Because it is impossible to exhaustively assess all aspects, it is essential for the assessment to answer specific questions. The assessment question is a way to formulate the purpose of your assessment and the point that it will address.

## How to define your assessment question?

**The assessment question can be defined on the basis of three elements:** your assessment's strategic aim and intended purpose, and effects identified as priorities for measurement.

Once you have mapped out the effects, you will need to identify, if possible along with several stakeholders, **which ones are priorities for measurement**. Depending on your assessment's strategic aim, they could be related to outstanding elements of your activities (their greatest added value), actions that form the project's core identity, an activity with outputs that you like to understand more clearly, etc.

There are **four main purposes of an assessment**<sup>(8)</sup>: below, you will find examples of assessment questions for each one.



**Produce regular information about the expected results of your actions**

Examples of assessment questions:

- What is the return-to-employment rate of long-term unemployed people assisted by our guidance and advice action?
- What is the reuse rate of glass containers enabled by our deposit return scheme?

(8) Avise, Fidarec and Improve, practical guide 'Comment évaluer son impact? Principes méthodologiques' [How to Assess Your Impact? Methodological Principles], 2021: [www.avise.org/ressources/comment-evaluer-son-impact-principes-methodologiques](http://www.avise.org/ressources/comment-evaluer-son-impact-principes-methodologiques)


**Understand**

Understand changes observed and potential explanatory factors

Examples of assessment questions:

- What are the effects for neighbourhood residents who have become representatives of VoisinMalin?<sup>(9)</sup>
- What is the impact of assistance provided by the federation Adédome (formerly Adessadomicile) on beneficiaries' families?<sup>(10)</sup>


**Demonstrate**

Demonstrate that changes are attributable to your actions

Examples of assessment questions:

- What is the societal added value of social mediation?<sup>(11)</sup>
- What is the impact of the scheme Groupement de Créateurs on young job seekers who have expressed an interest in business creation, in terms of their independence, and social and vocational integration?<sup>(12)</sup>


**Value**

Put a value on changes brought about by your actions

Examples of assessment questions:

- What economic and social value is generated by Passeport Avenir, after more than six years in operation, in relation to the investments made by its partners and the time devoted by its main contributors?<sup>(13)</sup>
- What is the local economic impact of the programme UNITERRES, led by the grocery shop network ANDES, in comparison with the conventional supply model of solidarity grocery shops?<sup>(14)</sup>
- What is the economic, environmental and social performance of the agroecological operation of Ferme de Cagnolles, a member of the network Fermes d'Avenir?<sup>(15)</sup>

(9) Avise, case study 'Le dispositif global d'évaluation de VoisinMalin' [VoisinMalin's Global Assessment System], 2017: [www.avise.org/ressources/le-dispositif-global-devaluation-de-voisinalin](http://www.avise.org/ressources/le-dispositif-global-devaluation-de-voisinalin)

(10) Avise, case study 'Expérimentation de l'outil Étoile de progression des familles' [Experimentation with the Tool "Family Outcomes Star™"], 2016: [www.avise.org/ressources/expérimentation-de-loutil-etoile-de-progression-des-familles](http://www.avise.org/ressources/expérimentation-de-loutil-etoile-de-progression-des-familles)

(11) Avise, case study 'Évaluation de l'utilité sociale de la médiation sociale' [Assessment of the Social Utility of Social Mediation], 2016: [www.avise.org/ressources/evaluation-de-lutilite-sociale-de-la-mediation-sociale](http://www.avise.org/ressources/evaluation-de-lutilite-sociale-de-la-mediation-sociale)

(12) Avise, case study 'Évaluation randomisée d'un dispositif d'insertion des jeunes' [Randomised Assessment of a Youth Integration Scheme], 2016: [www.avise.org/ressources/evaluation-randomisee-dun-dispositif-dinsertion-des-jeunes](http://www.avise.org/ressources/evaluation-randomisee-dun-dispositif-dinsertion-des-jeunes)

(13) Avise, case study 'SROI : le retour social sur investissement' [SROI - Social Return On Investment], 2016: [www.avise.org/ressources/le-retour-social-sur-investissement-de-passeport-avenir](http://www.avise.org/ressources/le-retour-social-sur-investissement-de-passeport-avenir)

(14) Avise, case study 'Mesurer l'impact économique local d'un projet' [Measuring a Project's Local Economic Impact], 2017: [www.avise.org/ressources/evaluation-de-limpact-economique-local-dun-iterres](http://www.avise.org/ressources/evaluation-de-limpact-economique-local-dun-iterres)

(15) Avise, case study 'Valoriser son impact avec la comptabilité multi-capitaux' [Value your Impact with Multi-Capital Accounting], 2020: [www.avise.org/ressources/valoriser-limpact-social-et-environnemental-avec-la-comptabilite-multi-capitaux](http://www.avise.org/ressources/valoriser-limpact-social-et-environnemental-avec-la-comptabilite-multi-capitaux)

For a "first steps" approach, we recommend **sticking to one or two assessment questions** to achieve satisfactory results. In any event, **assessment reveals a partial trend of the real situation**: the approach requires the definition of a limited assessment target, which is only one part of the whole topic being looked at.

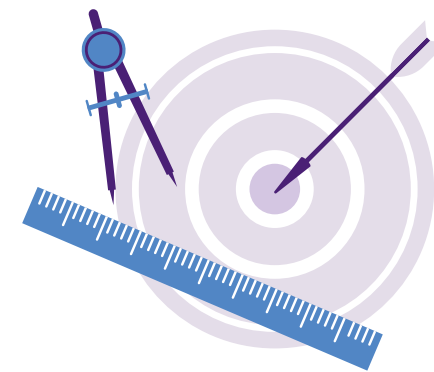


Notes



# 3

## MEASURE YOUR IMPACT



Which methodology to choose?  
How to define your indicators?  
Who to approach for data gathering?  
When and using which tools?

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CHOOSE  
THE RIGHT  
METHODOLOGY

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DEFINE YOUR  
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PREPARE  
YOUR DATA  
COLLECTION

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CARRY OUT  
YOUR DATA  
COLLECTION

# CHOOSE THE RIGHT METHODOLOGY

There are many available methods to assess your social impact: qualitative survey, cost-benefit analysis, social return on investment (SROI), randomisation, etc. Bear in mind, though, that **the method is a means of assessment** and the assessment's aim should not be to implement any particular method.

## Find your way through the various methods

The choice of method is determined in particular by the purpose of your assessment. Below, you will find examples of methods that can be used, according to your assessment's purpose.<sup>(16)</sup>

PURPOSE	EXAMPLES OF METHODS
<p><b>Monitor</b> Produce regular information about the expected results of our actions</p>	<ul style="list-style-type: none"> <li>• Dashboard monitoring</li> <li>• Tracking of indicators, indexes, ratings</li> <li>• Shared indicator reference frameworks</li> <li>• National or international norms and standards (e.g. sustainable development goals)</li> </ul>
<p><b>Understand</b> Understand changes observed through our actions and potential explanatory factors</p>	<ul style="list-style-type: none"> <li>• Mapping of stakeholders</li> <li>• Mapping of impacts</li> <li>• Qualitative analyses (surveys, interviews, discussion groups, observations, etc.)</li> <li>• Reviewing literature</li> </ul>
<p><b>Demonstrate</b> Demonstrate that changes are attributable to our actions</p>	<ul style="list-style-type: none"> <li>• Attribution analyses (before-after analyses, counterfactual studies, etc.)</li> <li>• Contribution analyses</li> </ul>
<p><b>Value</b> Put a value on changes brought about by our actions</p>	<ul style="list-style-type: none"> <li>• Monetization (social return on investment, avoided costs, etc.) and cost-benefit approaches</li> <li>• Multi-capital (or triple capital) accounting approaches</li> <li>• Contingent valuation approaches</li> </ul>

## online



Avisé has produced a guide that maps out and explains the main methods: [www.avise.org/evaluation-impact-social/demarches-et-methodes/mesurer-decouvrir-les-principales-methodes](http://www.avise.org/evaluation-impact-social/demarches-et-methodes/mesurer-decouvrir-les-principales-methodes)

(16) Further reading: Avisé, Fidarec and Improve, practical guide 'Comment évaluer son impact? Principes méthodologiques' [How to Assess Your Impact? Methodological Principles], 2021: [www.avise.org/ressources/comment-evaluer-son-impact-principes-methodologiques](http://www.avise.org/ressources/comment-evaluer-son-impact-principes-methodologiques); Stievenart, E., Pache, A-C, 'Évaluer l'impact social d'une entreprise sociale: points de repère' [Measuring the Social Impact of a Social Enterprise: Key Points], Recma, n° 33, 2014: [www.avise.org/ressources/evaluer-impact-social-points-de-repere](http://www.avise.org/ressources/evaluer-impact-social-points-de-repere)

## focus

QUANTITATIVE OR QUALITATIVE;  
INDUCTIVE OR DEDUCTIVE: WHICH TO CHOOSE?

### Quantitative or qualitative methods?

Quantitative methods, based on numerical inputs, are often contrasted with qualitative methods, which are more based on textual inputs.

Quantitative methods are perceived as being more effective for easy communication, but sometimes also as being oversimplistic and ill-suited to understanding human or social impacts. Qualitative methods, on the other hand, are perceived as better suited

to complex analysis of the social impacts and human dimensions of certain actions (related to self-confidence, independence, etc.), but also as less scientifically reliable and more difficult to implement.

While quantitative methods seek to verify assumptions, qualitative methods enable a better understanding of changes brought about. These two approaches are therefore complementary! For example,

we could use a qualitative method to develop assumptions and then a quantitative method to verify them. Conversely, we could develop assumptions based on quantitative data (such as data gathered from questionnaires) and then use a qualitative method to gain a deeper understanding of them.

Depending on your aims, it is in fact **often a good idea to combine both types of methods.**

### A deductive or inductive approach?

We can also distinguish between deductive and inductive approaches.

With the former, we begin with working assumptions that we then

attempt to validate or invalidate using gathered data: these are the most commonly used approaches.

With the latter, we develop assumptions as data is collected.

While they make it possible to be more exhaustive and to keep an open mind about observed effects, they consume far more resources.

## Choose the methodological principles of your assessment

Beyond guiding you in the choice of method, the purpose of your assessment enables you, first and foremost, to identify the most relevant methodological principles to perform the assessment. In other words:

<b>WHO?</b>	<ul style="list-style-type: none"> <li>• <b>Choice of sample:</b> significant or representative, with or without criteria</li> <li>• <b>Use of a control group or not</b></li> </ul>
<b>WHEN?</b>	<ul style="list-style-type: none"> <li>• <b>Before and after</b> the action</li> <li>• <b>Continuously</b> (at regular intervals throughout the project)</li> <li>• <b>After the action only</b></li> </ul>
<b>WHAT?</b>	<ul style="list-style-type: none"> <li>• <b>Quantitative data</b> (numerical) <b>or qualitative data</b> (textual, such as transcriptions)</li> <li>• <b>Objective data</b> (facts about the situation), <b>subjective data</b> (the respondent's assessment of their own situation), <b>or intersubjective data</b> (the respondent's assessment of another person's situation)</li> </ul>
<b>WITH WHAT?</b>	<ul style="list-style-type: none"> <li>• <b>Questionnaires</b> (online or in person)</li> <li>• <b>Interviews</b> (individual or collective)</li> <li>• <b>Observations</b> (in a real-life situation)</li> <li>• <b>Dashboards</b> (data already collected through the organisation's existing monitoring tools)</li> <li>• <b>Documentary analysis, of publications or data</b> (existing public data)</li> </ul>

## reading



### 'COMMENT ÉVALUER SON IMPACT ? PRINCIPES MÉTHODOLOGIQUES' [HOW TO ASSESS YOUR IMPACT? METHODOLOGICAL PRINCIPLES]

Produced in 2021 by Avise, Fidarec and Improve, within the framework of Social Value France, this practical guide suggests various items (type of sample to select, type of data to collect, etc.) to help you choose the methodological principles that are best suited to your assessment's purpose.

Available at:  
[www.avise.org](http://www.avise.org)

## focus

### ASSESS YOUR ENVIRONMENTAL IMPACT

ADEME, the French Agency for Ecological Transition, defines environmental impact as "all changes [...] in the environment (negative or positive) brought about by a project, [...] an organisation or a product, from its design to its 'end of life.'"

### Limit the consequences of your activities on your environment

All activities, projects and products generate impacts on the environment (consumption of materials and energy, production of waste and various emissions in the air, water and soil, etc.), leading to consequences in areas such as climate change, resource depletion and biodiversity. Environmental impacts are therefore always negative.

Unlike the concept of social impact, which entails a positive change for people and organisations,

the concept of environmental impact requires a limitation of the consequences of human activities on the environment. Understanding these impacts and reducing them is the whole challenge of environmental improvement and ecological transformation.

Specifically developed tools and methods are available to assess your environmental impact. Initially designed for all business organisations, these tools can be applied by SSE enterprises,

including small enterprises. These tools include indicator frameworks that integrate the environmental dimension (such as Impact Score created by Mouvement Impact France and the tool ValorESS developed by UDES), carbon footprint calculation tools (such as those developed by Association Bilan Carbone and Fondation GoodPlanet), lifecycle analysis methods and environmental accounting systems.

#### To find out more:

- The ADEME (French Agency for Ecological Transition) website, which offers a wealth of articles and resources [online]: [agirpourtatransition.ademe.fr/entreprises](http://agirpourtatransition.ademe.fr/entreprises)
- Avise, 'Se repérer dans l'évaluation de l'impact environnemental' [Finding Your Way with Environmental Impact Assessment] [online]: [www.avise.org/actualites/se-reperer-dans-levaluation-de-limpact-environnemental](http://www.avise.org/actualites/se-reperer-dans-levaluation-de-limpact-environnemental)
- Avise, 'Zoom : les comptabilités environnementales' [Focus on Environmental Accounting

Systems] [online]: [www.avise.org/evaluation-impact-social/demarches-et-methodes/zoom-les-comptabilites-environnementales](http://www.avise.org/evaluation-impact-social/demarches-et-methodes/zoom-les-comptabilites-environnementales)

- Avise, 'Valoriser l'impact social et environnemental avec la comptabilité multi-capitaux : l'expérimentation de la Ferme de Cagnolle' [Valuing Social and Environmental Impacts with Multi-Capital Accounting: Experimentation by Ferme de Cagnolle], 2020: [www.avise.org/ressources/valoriser-limpact-social-et-environnemental-avec-la-comptabilite-multi-capitaux](http://www.avise.org/ressources/valoriser-limpact-social-et-environnemental-avec-la-comptabilite-multi-capitaux)

- Avise, Fidarec and Improve, 'Comment évaluer son impact ? Principes méthodologiques' [How to Assess Your Impact? Methodological Principles], 2021: [www.avise.org/ressources/comment-evaluer-son-impact-principes-methodologiques](http://www.avise.org/ressources/comment-evaluer-son-impact-principes-methodologiques)
- Convergences, Avise and Improve, 'S'engager dans la mesure d'impact environnemental : points de repères' [Initiating Environmental Impact Measurement: Key Points], 2021: [www.avise.org/ressources/sengager-dans-la-mesure-dimpact-environnemental-points-de-reperes](http://www.avise.org/ressources/sengager-dans-la-mesure-dimpact-environnemental-points-de-reperes)

# DEFINE YOUR INDICATORS

Measuring your impact involves identifying and quantifying information, in order to enable an assessment of changes generated by your actions. By using indicators, you can **specify the information that needs to be gathered** in order to answer your assessment question.

## Know the types of information to gather

Information that will feed into the indicators can be collected in **qualitative** form (textual inputs) or **quantitative** form (numerical inputs). This can include cardinal values (amount, percentage, etc.), rating scales (very important, fairly important, not very important, etc.), binary data (yes or no), ratios (number of interactions per day), changes over time, and so on.

We can also distinguish between **objective data** (based on a factual situation), **subjective data** (based on the respondent's perception) and **intersubjective data** (based on the interviewee's perception of another person).

**Most social impact assessments use a combination** of all these data types.

## Understand how to define your indicators

To define your indicators, on the basis of your assessment question, identify the information that needs to be obtained to assess each effect, as well as the target value that the indicator needs to reach to meet your project's objectives. You can use three indicator categories:

- **standardised indicators**, shared by many organisations across different sectors. Some of these include a reference value.

*For example:* rate of women in an organisation (target value: parity, i.e. 50%); employment rate of disabled people (minimum value in France: 6% of the company's workforce, etc.);

## note



Some indicators, particularly those concerning intangible concepts (well-being, independence, etc.), are more difficult to measure than others. Measurement of these will indicate a trend of the real situation, which will still enable you to assess impacts generated by your activity.

- **sectorial indicators**, more specific to a type of activity.  
*For example:* rate of positive outcomes for vocational integration schemes; tonnes of avoided waste for the circular economy; CO2 emissions avoided for green mobility, etc.;
- **specifically created indicators** for the organisation's activity. These are often inspired by other indicators (standard, sectorial or previously created by another organisation), and adapted to the project's context (target audience, time when data is collected, etc.)  
*For example:* number of falls avoided for elderly people taking part in the activities of the group of associations Siel Bleu.

## Practical ways to define your indicators

### Draw inspiration from existing approaches

Many assessment approaches have been carried out by public actors, non-governmental organisations, SSE enterprises, etc. To define your indicators, the first step is to look at what has been done and get inspired!

### Consult the list (non-exhaustive) of reference frameworks, p52.

You can also draw inspiration from assessment approaches carried out by organisations with activities that are similar to the one you are looking to assess.

### Select your indicators

The aim is then to select the most relevant indicators among the many that are available. The second step involves organising an indicator definition workshop, using the mapping of expected impacts as a basis.

For each effect that will be assessed, consider which indicators could be used to measure it, then **select and prioritise the most relevant ones**, by asking the following questions:

- Does the indicator contribute to answering my assessment question (in full or in part)?
- Is the information already available?
- Is the information to be collected accessible? Is it easy to collect?

Because the choice of indicators is the last step before data collection, we strongly recommend that you involve your stakeholders, particularly those that will be involved in collection, in order to achieve an assessment that is as relevant to your activity as possible.

## on line



### DRAW INSPIRATION FROM IMPACT REPORTS

You can find impact reports at:

- the media library of the national resource centre for social impact assessment, run by Avisa: [www.avise.org/evaluation-impact-social/mediatheque](http://www.avise.org/evaluation-impact-social/mediatheque)
- IMPACT TANK's "Wall of Solutions": [impact-tank.org/mur-des-solutions/](http://impact-tank.org/mur-des-solutions/)
- the Social Impact Assessment Observatory wiki run by ESSEC Business School: [emis-essec.wiki/thematiques](http://emis-essec.wiki/thematiques)



# Indicator frameworks that are useful to know

## GENERAL REFERENCE FRAMEWORKS:

- The United Nations **Sustainable Development Goals** (UN SDGs) form a framework of 17 goals, shared by the organisation's 197 member countries, which can be used as a basis for the definition of impact assessment indicators. While some of the indicators included in the SDG framework are distant from the reality of SSE enterprises, they can nevertheless be used as a way to mobilise. In particular, they can be a concrete expression of your contribution to global challenges and form a basis for discussion with actors that are unfamiliar with the SSE. France's National Council for Statistical Information (CNIS) provides a methodology that is reputed for its robustness and reliability. In 2018, it defined 98 indicators inspired by SDGs, which reflect the French context more closely, as well as values for these indicators at national level.

### Examples of indicators:

- **Poverty and accessibility:** proportion of households without the financial means to consume one source of protein at least every two days; rate of refraining from healthcare for financial reasons; proportion of people affected by energy poverty; rate of overcrowding in housing; proportion of individuals who have connected to the internet over the past three months; etc.
- **Health and environment:** prevalence of overweight and obesity; healthy life expectancy; life satisfaction; population supplied with substandard water; proportion of surface area with organic agriculture; food loss and waste; etc.

- **Education and training:** proportion of children and youths attaining the minimum required level in reading and maths; digital skills among private individuals; drop-outs from the school system; number of sustainable development education projects in schools; proportion of women studying science subjects at university level; etc.
- **Employment:** employment rate; underemployment rate; work intensity and time pressure at work; etc.

**To find out more:** [www.avise.org/actualites/les-odd-comme-cadre-devaluation](http://www.avise.org/actualites/les-odd-comme-cadre-devaluation)

- The reference framework in the **Valor<sup>ESS</sup> platform**, developed by French UDES (union of employers in the social and solidarity economy), offers 43 impact indicators, broken down into 13 dimensions (development of knowledge and well-being, improvement of health, development of independence, vocational integration, reduction of inequalities, sustainable production, etc.). It also offers the possibility to break the indicators down into six action categories, with recommendations for their implementation. In addition, Valor<sup>ESS</sup> suggests 60 management indicators in areas such as governance, human resources, business models and local engagement.

### Examples of indicators:

- **Train, educate, raise awareness:** rate of individuals who have developed technical knowledge, their ability to work in a team, their self-confidence, etc.
- **Develop social links and cohesion:** rate of individuals who have reduced their access time to a facility or service, who are more at ease in administrative procedures or personal situations, etc.
- **Provide care and assistance:** rate of individuals who have gained in independence, who have activities that promote social contact, whose stress levels have fallen, etc.

- **Develop and share culture and leisure for all:** rate of individuals who have developed a cultural or leisure pursuit, who have gained in self-esteem, who have improved their ability to get along with others, etc.
- **Produce and consume sustainably:** level of increase in the useful life of a product, level of waste reduction, rate of individuals who have changed their behaviours, etc.
- **Provide assistance for social and vocational integration:** rate of positive outcomes, rate of individuals who are able to perform the target job independently, who have a defined career plan, etc.

**To find out more:** [www.valoress-udes.fr](http://www.valoress-udes.fr)

- **Impact Management Project** (in English), an analysis framework for impact projects, used by more than 2000 organisations internationally.

**To find out more:** [www.avise.org/actualites/limpact-management-project-un-outil-standardise-et-consensuel-de-la-mesure-dimpact](http://www.avise.org/actualites/limpact-management-project-un-outil-standardise-et-consensuel-de-la-mesure-dimpact)

- **The IRIS+ measurement system** (in English) provided by the Global Impact Investing Network.

**To find out more:** [iris.thegiin.org/metrics](http://iris.thegiin.org/metrics)

- **The tool MESIS**, co-constructed by Banque des Territoires, BNP Paribas and INCO, and designed for impact investors in particular. It offers a catalogue of 400 indicators organised into social action fields, enabling the definition of social objectives and monitoring of project performance.

## SECTOR-SPECIFIC REFERENCE FRAMEWORKS:

- In collaboration with project owners, Fondation Daniel et Nina Carasso has created impact indicator frameworks and methods:

- **to assess the impact of food projects** [online]: [www.avise.org/ressources/comment-mesurer-impact-dun-projet-alimentaire](http://www.avise.org/ressources/comment-mesurer-impact-dun-projet-alimentaire)

**Examples of indicators:** rate of citizens who scored at least 5 correct answers out of 7 in the food knowledge test, who positively changed at least 5 practices out of the 7 suggested, who stated that they have more power in the area of food policy, etc.

**More indicators available at:** [syalinnov.org](http://syalinnov.org)

- **to assess the social impact of citizen art projects** [online]: [www.avise.org/ressources/la-boussole-de-lart-citoyen-renforcer-impact-de-votre-projet-grace-a-évaluation](http://www.avise.org/ressources/la-boussole-de-lart-citoyen-renforcer-impact-de-votre-projet-grace-a-évaluation)

**Examples of indicators:** rate of participants who pursue a cultural activity, rate of families that open up to new cultural activities, number of new artistic projects that emerge in the local area, etc.

- With the support of the 21 **solidarity garages** that are beneficiaries of their assistance programme, Avise and Groupe PSA (now Stellantis) developed a social utility assessment tool for solidarity garages.

**Examples of indicators:** number of beneficiaries who found a job thanks to the intervention of the solidarity garage, number of beneficiaries who maintained mobility independence thanks to the solidarity garage, average savings made by the beneficiaries thanks to the intervention of the solidarity garage, etc.

**To find out more:** [www.avise.org/ressources/comment-evaluer-et-communiquer-sur-lutilite-sociale-dun-garage-solidaire](http://www.avise.org/ressources/comment-evaluer-et-communiquer-sur-lutilite-sociale-dun-garage-solidaire)

- The associations Possible and Ronalpia have led the Act'ice assistance programme, dedicated to the justice-prison sector, for three years. In 2021, they launched a project to jointly develop an **impact assessment framework for justice-related projects**, with entrepreneurs and institutions in the sector.

**To find out more:** [www.ronalpia.fr/actice-incubation-justice](http://www.ronalpia.fr/actice-incubation-justice)

- In 2019, Coopérer pour Entreprendre developed a reference framework and tools dedicated to **activity and employment cooperatives (CAEs)**, through its programme CAE Impact, supported by Avise as part of the activities of its intermediate body for the European Social Fund Plus.

**Examples of indicators:** improvement in members' personal skills development, improvement in members' personal situations after joining the CAE (improved access to housing, loans and a childcare facility), progress in members' entrepreneurship projects, etc.

**To find out more:** [www.avise.org/evaluation-impact-social/lappel-a-projets-avise-fse-sur-impact-social/laureat-2018-cae-impact](http://www.avise.org/evaluation-impact-social/lappel-a-projets-avise-fse-sur-impact-social/laureat-2018-cae-impact)



### Finalise the definition of your indicators

Before beginning to collect your data, ensure the following for each selected indicator:

- information sources are identified and accessible (existing documentation, stakeholder to be interviewed, etc.);
- a target value, corresponding to the attainment of objectives, has been set.



## case study

### INDICATORS CHOSEN BY FERME DU PARC DES MEUNIERIS

**Assessment question:** What is the impact of vegetable growing and cooking workshop organisation activities on integration scheme participants assisted by Ferme du Parc des Meuniers?

**Assessed activities:** vegetable growing and cooking workshop organisation

**Targets:** youths and adults participating in integration schemes

EFFECTS TO ASSESS	EXAMPLES OF INDICATORS	EXAMPLES OF TARGET VALUES* (after 1 year of assistance)
ACCESS TO TRAINING AND JOBS	Number and % of participants finding a job	20% of integration scheme participants find a job
	Number and % of participants joining a course	20% of integration scheme participants join a course
IMPROVEMENT IN PHYSICAL AND MENTAL HEALTH	Improvement in diet: change in eating habits	60% of people assisted pay more attention to the nutritional values of products they consume, as well as their local and organic aspects
	Improvement in mental health: rate of beneficiaries who picked up an outdoor activity	No less than half of the assisted people picked up at least one outdoor activity
IMPROVEMENT IN SOCIAL LINKS AND INCREASE IN SOCIAL DIVERSITY	Development of social interactions with local residents	60% of the people assisted made new acquaintances among local residents
	Diversity of visitors to the centre (families, social backgrounds, ages, etc.)	Visitor profiles trending towards the local area's socio-demographic profiles

\*These target values are given for illustration purposes only, as Ferme du Parc des Meuniers' assessment is still underway

# PREPARE YOUR DATA COLLECTION

You will need time and resources to collect and analyse data. It is therefore important to focus on areas that are the most useful and relevant, so that the assessment approach does not get in the way of carrying out your activities.

## Identify available means and resources

It is essential to set the scope of your data collection before beginning. This is because your collection methods (people mobilised for collection, choice of tools, etc.) will be highly dependent on your available resources, your constraints, your schedule, etc. It is therefore necessary, at this stage, to review these elements, in order to **accurately determine the extent of your collection**. It is also possible to integrate time spent on collection in your usual activities.

Another important task at this point is to **have another look at the data you already have access to** through other tools (operational management systems, beneficiary satisfaction surveys, assessments carried out by other organisations with a similar activity, etc.): make sure you don't collect the same data twice!

Ask yourself the following questions in particular:

- What data are already available in our organisation?
- What support or resources can I mobilise to assist me in the approach (team, operational partners, volunteers, etc.)?

## Devise your measurement plan

By devising a measurement plan, you can **set out answers to the following questions, for each indicator**: who to ask?; what type of data to collect?; which collection tools to use for this data?; when to collect the data?

*"It's crucial to set the size of your data collection according to the resources at your disposal, even if that means leaving some things out at the beginning of your assessment approach."*

**LAËTITIA RUILIER**  
SOCIAL INNOVATION OFFICER  
HABITAT DES POSSIBLES

# case study

## Illustration with a youth vocational integration scheme

Following on from the previous example, these measurement and collection plans are ones that could be devised by the scheme 'Jeugd en Stad' to assess the effect 'The young person gains in confidence and self-esteem'.

### Measurement plan

INDICATORS	WITH WHOM?	WHICH TYPE OF DATA?	WITH WHAT?	WHEN? BY WHOM?
Proportion of youths who have gained confidence in their personal project	Young beneficiaries	Qualitative, subjective	Individual interviews	September, during dedicated interviews carried out by the educators
	Educators	Qualitative, intersubjective	Group interviews	October, by the management team
The youths' level of confidence in the various local assistance actors	Young recipients	Quantitative and qualitative, subjective	Individual interviews	September, during dedicated interviews carried out by the educators
	Educators	Qualitative, intersubjective	Collective interviews	October, by the management team
	Local partners	Quantitative, objective <i>(change in level of requests from youths)</i>	Questionnaire survey	November, by the management team
Rate of youths who have more social interactions thanks to the activity	Young recipients	Quantitative, subjective	Collective interviews	September, during mobilisation interviews already planned by the educators
	Educators	Qualitative, intersubjective <i>(types of interactions)</i>	Group interviews	October, by the management team
Change in the score on the Rosenberg self-esteem scale*	Young beneficiaries	Quantitative, subjective	Individual interviews	September, during mobilisation interviews already planned by the educators

\*This scale is based on 10 questions that determine a score indicating the level of self-esteem.

### Collection plan

WITH WHAT? WHEN? BY WHOM?	WITH WHOM?	WHICH TYPE OF DATA?	INDICATORS
Individual interviews in September, during mobilisation interviews already planned by the educators	Young beneficiaries	Quantitative, subjective	Rate of youths who have more social interactions thanks to the activity
			Change in the score on the Rosenberg self-esteem scale
Dedicated individual interviews, carried out by the educators in September	Young beneficiaries	Quantitative and qualitative, subjective	Proportion of youths who have gained confidence in their personal project
			The youths' level of confidence in the various local assistance actors
Group interviews, carried out by the management team in October	Educators	Qualitative, intersubjective	Proportion of youths who have gained confidence in their personal project
			The youths' level of confidence in the various local assistance actors
			Rate of youths who have more social interactions thanks to the activity
Questionnaire survey, carried out by the management team in November	Local partners	Objective quantitative data	The youths' level of confidence in the various local assistance actors



Before beginning to collect your data, you will also need to **define each person's role** during the collection phase (who is coordinating this phase, who is in charge of collecting which data, within what time frame, etc.).

In addition, when collecting data, it is generally not possible to question the entire target population: **choose a sample to question**. This can be a significant sample (i.e. one that is sufficiently large to represent the whole of the target population) or a representative sample (i.e. one that has the same characteristics, in the same proportions, as the target population: gender distribution, age categories, etc.).

## Devise your collection plan

Once you have finalised your measurement plan, you can put it together with your actions to transform it into a collection plan: **a single tool can be used to collect several data types at the same time** and therefore feed into several indicators at once (see case study on p.57).

## Involve your stakeholders

We recommend that you share your measurement plan and collection tools with the stakeholders you mobilise in this phase, in order to:

- **approve the relevance of your measurement plan** (which stakeholder the data is collected from, using which method, etc.);
- **make sure that the data collected** will be able to feed into the indicators and therefore answer your assessment question.

*"By involving our stakeholders in the assessment approach, we were able to adjust our actions with our close partners, particularly local authorities and project owners."*

**GAËLLE WERKLING**  
DIRECTOR OF INCUBATEUR  
BALUCHON

## case study

### BALUCHON, PARTICIPATIVE ASSESSMENT AS A COMPASS GUIDING THE PROJECT

Formed in 2012, in Romainville (Île-de-France), Baluchon is a group of social enterprises working towards the food transition. In 2019, after being selected by the French National Agency for Territorial Cohesion (ANCT) as part of its call for expressions of interest 'Tremplin Asso', Baluchon launched a project creation assistance programme in the area of catering professions and food transition. The project's assessment, financed within the framework of the call for expressions of interest, was carried out at the same time as its deployment.

Baluchon chose to be assisted by ExtraCité, a consultancy cooperative working towards sustainable local development, due to the highly participative

dimension of its proposed approach. More than twenty exploratory interviews were conducted with stakeholders (assisted organisations, local authorities, operational partners, financiers, etc.) to define the assessment framework. These interviews led to the inclusion of new indicators in the framework: the project owners receiving assistance, for example, suggested tracking changes in their level of confidence in Baluchon, in their social protection and in their perception of the neighbourhood, as well as the incubator's ability to encourage organisations to establish themselves in the neighbourhood and engage in local life. The framework was then shared and adjusted over the course of two collective

workshops involving fifteen or so partners. These also enabled co-construction of the data gathering methodology (types of information to collect, level of importance, quality and availability of data, tools to use, etc.).

This method enabled Baluchon to improve knowledge of its activities among its partners, to clarify their expectations in relation to the project, and to establish shared terminology and objectives. It also enabled them to ensure the feasibility of the assessment approach, particularly in terms of data collection. The assessment, which continued until summer 2022, also allowed Baluchon to identify new indicators and integrate them into its processes, in order to monitor its activities and generated impacts more closely.

# CARRY OUT YOUR DATA COLLECTION

In order to begin and successfully complete your data collection process, you need to choose the most relevant tools, while identifying good practices to implement for each one.

## Choose your collection tools

The choice of collection tools **depends on the types of data you want to gather and the ways you plan to process them.**

It is also essential to choose tools according to the means and resources at your disposal. For example, in comparison with a questionnaire, gathering answers through interviews will give you more detailed data, but the time required to process them will be longer.

Below, you will find a few tips about the four most commonly used tools:

- exploitation of existing data;
- questionnaires and surveys;
- interviews (individual or group);
- scales.

## Exploitation of existing data

You will find that much useful data for your assessment is **already being collected** as part of your activities, whether it is in files used to track your beneficiaries or partners, communication documents (such as your activity report), satisfaction surveys, and so on. It is essential to identify which information you already hold, in order to focus your efforts on the priorities!

### Good practices:

- ✓ Consolidate all available resources in a file or folder
- ✓ Analyse the resources and select data that is relevant to feed into your indicators

*"You shouldn't choose a tool without first considering how you will process the information you want to collect. Otherwise, you risk collecting data that you will never process."*

**VICES**  
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*[THIS IS NOT A GUIDE]*

- ✓ Identify tracked data and data to be tracked, and their collection time frame
- ✓ Identify missing or incomplete data

It is often useful at this stage to review:

- existing literature (publications on the issue addressed, comparable assessment reports, academic research on your topic, etc.);
- assessments carried out by similar organisations, to draw inspiration from their approaches and build on their experiences!

## Questionnaires

Questionnaires are a **series of questions that are often widely distributed to gather as much data as possible.** They are useful tools to compare information over time, according to groups, and so on. Questions are mainly closed, in order to facilitate the processing of results (trend analysis, verification of respondents' representativeness in relation to targeted stakeholders, etc.). There are many free materials available online to help produce questionnaires.

### Good practices

- ✓ Assemble all the questions to be put to a single group of stakeholders in a single questionnaire
- ✓ Check that each question asked will be useful for the assessment
- ✓ Test your questions with your teams to make sure they are clearly understood, verify terminology used, etc.
- ✓ Test the questionnaire with a group of 10-15 people before distribution and adjust if necessary
- ✓ Identify data that will not be gathered via the questionnaire and will require the deployment of other tools

### What makes for an effective questionnaire?

- a completion time of 20 minutes at most;
- an introduction to present the approach (project identity, objectives, etc.);
- simple, clear and concise questions, expressed in a neutral way!;
- regular follow-ups sent to your targets.

## Interviews (individual or group)

Interviews are a **series of mostly open questions, to give interviewees room to express their thoughts.** They are useful to gather opinions,

perceptions, viewpoints, and so on. They are usually guided in order to facilitate their subsequent analysis.

You may turn to a third party to carry out your interviews: this can be useful, for example, to allow greater freedom of expression, avoid conflictual relationships, ensure the neutrality of answers, etc. On the other hand, in certain situations, such as interviews with vulnerable audiences, it can make more sense to call on people with whom they are already familiar in order to facilitate exchanges. In all cases, it is important to **avoid influencing** the answers given by interviewees!

### Good practices

- ✓ Prepare an interview guide in advance, containing the questions and a framework
- ✓ Test your questions with your teams and a few target interviewees, in order to check clear understanding of the titles, terminology used, etc.
- ✓ Plan for note-taking, and possibly a recording with the participants' prior agreement
- ✓ Provide sufficient time to carry out your interviews in a comfortable, unhurried manner
- ✓ Before the interview, present the approach and explain how the results will be used (anonymized data, internal use only, etc.)
- ✓ Similarly, prepare information to conclude your interviews (such as an explanation of the next steps)
- ✓ Prepare reports of the results for the people interviewed, who have devoted their time to your approach

More specifically for group interviews:

- ✓ Ensure an even distribution of speaking time, possibly by assigning facilitator and timekeeper roles
- ✓ Adapt your discourse according to the stakeholders involved and facilitate collective intelligence (particularly in the case of mixed groups, bringing together operational partners and financiers, for example)

### What makes for an effective interview?

- An interviewer who instils trust in the interviewees;
- Sufficient room for the interviewees to express their thoughts. The people interviewed may share things with you that do not fit into the interview framework: it is important to listen to them and, if necessary, to pursue their line of thought by asking additional questions that develop a deeper understanding!

## note



The measurement step must be reliable and credible in the eyes of stakeholders: prevention of bias is therefore an essential aspect. You need to be careful about the choice of tools and people mobilised to carry out collection. As a minimum, inform your teams about this aspect so that they remain as impartial as possible during data gathering.

## Scales

Scales are formed of **multidimensional criteria that enable measurement of changes in a situation and drawing of comparisons**. Practically speaking, a series of questions is given to the person interviewed to establish their position in relation to the criteria analysed. The data set can then be consolidated in a spreadsheet and presented in the form of diagrams, such as a Kiviat diagram (spider chart).

While there are scientifically established scales available for some effects, such as independence and self-confidence, each actor is free to adapt tools using their own criteria.

### Good practices

- ✓ Identify criteria and, for each one, define different levels (caution: this can prove to be a complex task)
- ✓ Take the time to have a long discussion with the person interviewed, to properly assess the criterion and choose the correct positioning
- ✓ Integrate this tool in the implementation of your activities



## case study

### THE FEDERATION ADÉDOM AND THE "FAMILY OUTCOMES STAR"

In 2015, the national federation Adédom (formerly Adessadomicile) produced a social impact assessment framework for its home assistance services, including the use of a tool named 'Étoile de progression' (Outcomes Star<sup>(17)</sup>). The tool graphically symbolises a star, where each of the branches represents a topic and indicates

a scale of 1 to 10. Use of the tool was shared between people receiving assistance and those providing it, in order to measure changes for beneficiaries.

**To find out more**, read the case study 'Expérimentation de l'outil Étoile de progression des familles' [Experimentation with the Tool "Family Outcomes Star™"] produced by Avise

in 2016 [online]: [www.avise.org/ressources/experimentation-de-loutil-etoile-de-progression-des-familles](http://www.avise.org/ressources/experimentation-de-loutil-etoile-de-progression-des-familles) or the website [www.etoile-progression.com](http://www.etoile-progression.com) dedicated to deployment of the tool in France.

<sup>(17)</sup> This tool is the property of Triangle Consulting Social Enterprise, a UK-based consultancy firm



# 4

## USE THE GATHERED DATA



How to use the gathered data?  
Which lessons to draw from the assessment?  
What are the best ways to share your results?  
How to integrate this approach into your practices?

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ANALYSE  
THE DATA

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THE RESULTS

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SUSTAIN YOUR  
APPROACH

# ANALYSE THE DATA

Now that you have collected the data you need to answer your assessment question, the next step is to analyse them.

## Understand the different approaches

There are three main approaches to analysing data<sup>(18)</sup>:

- **the exploratory approach**, which is part of a broad, open questioning, without any specific expectations or set assumptions to guide analyses;
- **the descriptive approach**, also known as 'change analysis', where we know what we are looking for and the expected format of the information. This approach describes observed percentages, averages, etc., for all the measurements, but with each one separated from the others.
- **the explanatory approach**, which is based on assumptions of relationships between the various measurements performed. The comparison of information throws light on relationships and interactions between the indicators, thereby enabling a clearer understanding of changes and their mechanisms.

### The type of analysis to use for your assessment depends on its purpose:

- if you would like to **monitor** changes generated, you will probably want to adopt a descriptive approach;
- if you would like to **understand, demonstrate or value** changes generated, you will probably want to adopt an explanatory approach;
- the exploratory approach is seldom used for these assessment purposes, because it serves more to paint a general picture. It can, however, be interesting to adopt it to identify your project's expected impacts.

(18) Avise, Fidarec and Improve, practical guide 'Comment évaluer son impact? Principes méthodologiques' [How to Assess Your Impact? Methodological Principles], 2021

## Practical ways to analyse your data

### 1 Review the gathered data

- Compile all of the gathered quantitative data (answers to questionnaires, tracking data, etc.) in a file;
- Transcribe all of the interviews and group them together in a single folder. A single series of interviews (same framework; same type of interviewers and interviewees; same time frame) can be transcribed in a single file to facilitate their analysis.

### 2 Carry out several analyses, according to the type of data gathered

**With quantitative data**, you can, for example:

- analyse how indicators change over time (e.g. monitoring of youths' level of self-confidence when joining the scheme, when leaving, and then six months after leaving);
- carry out statistical analyses (sum, average, median, standard deviation, correlation, causality, etc.), possibly with a time variable.

**With qualitative data**, you can, for example:

- identify recurring themes (expression of a need or effect, importance attributed to these, etc.) by counting their occurrence, at different times or in various contexts (for example, before and after an action to analyse its effect on people involved);
- observe explanatory factors of your action's effects;
- determine trends in the way your action is perceived (do you have several similar descriptions of the same effect?);
- gather transcriptions to illustrate the analyses carried out.

### 3 For each indicator, summarise the main results obtained

By comparing the results for each indicator, you will be able to answer your assessment question, in relation to the assessed effect, on the basis of your collected information (numerical data, transcriptions, etc.).

read



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Find more data analysis tips in the section 'Étape 3 - Traiter et analyser vos données collectées' [Step 3 - Process and analyse your collected data] of VISES' publication.

Available at:  
[www.avise.org](http://www.avise.org)



## case study

### ANALYSIS OF THE DATA OF A YOUTH VOCATIONAL INTEGRATION SCHEME

Following on from the previous example, this analysis is one that could be carried out by the scheme 'Jeugd en Stad' (JES – Youth and City) to answer its assessment question. "To what extent does the organisation's activity enable young people to rebuild confidence?"

SELECTED INDICATORS	DATA ANALYSIS SUMMARY (extracts)
PROPORTION OF YOUTHS WHO HAVE GAINED CONFIDENCE IN THEIR PERSONAL PROJECT	<ul style="list-style-type: none"> <li>Overall, the beneficiaries feel that there has been little change, with a marked difference depending on whether the young person joined the scheme voluntarily or on instruction. Young people who joined the scheme voluntarily state that they have more confidence in themselves.</li> <li>Overall, the educators observe a change in the attitudes of the assisted youths, particularly in the vocational dimension of the coaching.</li> </ul>
THE YOUTHS' LEVEL OF CONFIDENCE IN THE VARIOUS LOCAL ASSISTANCE ACTORS	<ul style="list-style-type: none"> <li>The local partners, particularly those working more specifically with youth audiences, observe a higher level of engagement among beneficiaries in their administrative procedures.</li> <li>All of the partners interviewed as part of the assessment approach describe the organisation as a necessary and indispensable local actor for the social and vocational integration of youths in the area.</li> </ul>
RATE OF YOUTHS WHO HAVE MORE SOCIAL INTERACTIONS THANKS TO THE ACTIVITY	<ul style="list-style-type: none"> <li>When joining the scheme, only one third of the young people had social relations outside of their circle of family and friends. After six months in the scheme, more than half of the young people had had regular social interactions outside of their circle of family and friends, particularly with actors in neighbourhood sports associations.</li> </ul>

# INTERPRET THE RESULTS

Once you have analysed your data, you can focus on the global interpretation of the results and the answer to your assessment question. It is also at this step that the assessed action's value will be appraised: does it achieve its objectives?; does it lead to other impacts?; are the resources deployed sufficient?; etc.

## How to interpret the results?

In order to reach this overall answer, you will need to **use the observations** made from data collection and analysis, **compare them with the target values** set to assess attainment of the action's objectives and **evaluate them in relation to your environment** (context of the sector and local area, results of actions taken by other organisations, etc.).

It is also important at this stage to **identify any potential bias or limits** in your assessment approach: for example, if you were unable to interview all the people you wanted to, if few people responded, if you made assumptions, etc.

### A few tips to interpret your results:

- put together a group of several stakeholders to compare views and interpretations;
- present the conclusions of your study, and explain the possible interpretations and bias, in order to produce an appraisal of value;
- avoid trying to validate an assumption at all costs, and accept results that are unexpected, unwanted or incomplete.

Furthermore, take care **to avoid attributing results to yourselves too readily** and identify other explanatory factors. For example, in the case study presented on p.72, a proportion of the young people assisted, particularly those who joined the scheme voluntarily, stated that they had regained self-confidence. And, after the scheme, more than one third of them signed a permanent contract following their initial contract. However, these young





## case study

### INTERPRETATION OF THE RESULTS OF A YOUTH VOCATIONAL INTEGRATION SCHEME

Following on from the previous example, this interpretation is one that could be made by the scheme 'Jeugd en Stad' (JES – Youth and City) to answer its assessment question. *“To what extent does the organisation’s activity enable young people to rebuild confidence?”*

**Thanks to the scheme, the young beneficiaries improved their social interactions:** nearly half of the youths interacted several times with people outside of their circle of family and friends, particularly with actors from associations such as the neighbourhood’s sports club. This increase in the number of interactions following six months of assistance demonstrates the organisation’s utility in encouraging youths to become more socially interactive. **This perception of an improvement in social interaction is shared by local**

**partners,** particularly those working specifically with young people, which reported that: *“The young people who come from the organisation are motivated. Most of them arrive with their documents already filled in!”*

**The teaching team also observed a change in beneficiaries’ attitudes,** particularly during job interview simulation activities. **While the thirty beneficiaries interviewed struggle to assess their experience and their ability to steer their life, they express an improvement in their general well-being:** *“since I started*

*coming here, I go to the sports club with my brother and I have better relationships with my family, especially at home.”*

**The organisation therefore plays a necessary and important role in the local area: among other things, its actions help to raise awareness of the aims of social and vocational integration among young beneficiaries.** However, this observation is far more evident in young people who voluntarily join the scheme than in those who are sent by partners.

people probably took other initiatives and were assisted by other schemes, which also facilitated their recruitment: the organisation’s activities undoubtedly made a contribution, but they were not necessarily the only factor in this impact.

## Involving your stakeholders in the interpretation of the results

It is crucial to involve your stakeholders in the interpretation of your results, as each one can be interpreted differently depending on the context, the results of other actions, the experience of your beneficiaries or partners, etc. For example, an observed effect may appear satisfactory for a financier,

but insufficient for a social worker. By **allowing a diversity of perspectives and then comparing them**, you will be able to build a shared vision of the project, bring to light the subtleties of the results obtained, and put forward relevant recommendations and adjustments (do we need to adapt our activities, services or assistance and, if so, how?).

Involving your stakeholders in the interpretation of your results will also enable them to **get a better grasp of your assessment’s conclusions**, and then share and use them more effectively.

# USE THE RESULTS

Whether the aim is to communicate about or to improve your actions, the importance of the results use phase should not be underestimated. It is at this stage that you will be able to promote your approach and the efforts made, as well as improve the ways you manage your activities and make decisions.

## Use your results externally

Whatever the target audience for your communications – the general public, your beneficiaries, your partners or your employees – it is essential to:

- **Frame your communication strategy**
  - Which stakeholders do you want to communicate to?
  - What is the objective? (are you looking to describe or convince?)
  - When or on which occasion to communicate?
  - Using which materials?
  - Who will speak? In whose name?
- **Work on the presentation of your results**
  - Identify the key messages that you want to convey
  - Identify key indicators and data to highlight
  - Stats and stories: alternate the presentation of figures and experiences

## Social impact assessment report examples

- **Yuka**, which has created an app to help consumers choose products, opted for a highly communicative approach, with a short, visual report that highlights key figures and testimonials. The report also presents the context, the method used and the study's limits, indicating planned avenues for use.<sup>(19)</sup>
- **The initiative 'Maisons des Familles'**, developed by Apprentis d'Auteuil, aims to provide places for listening, sharing and mutual help, for parents and children. Their impact report is also relatively short, featuring visual elements (particularly quotes and key figures). However, it contains more detailed descriptions and textual explanatory information, making it a longer read.<sup>(20)</sup>

"This assessment work guided the reshaping of our organisation's vision and our approach to constructing projects. It also gave us a solid foundation to assert the benefits of our actions."

**NADÈGE MONIEZ**  
DEPUTY DIRECTOR  
JOSÉPHINE

<sup>(19)</sup> [yuka.io/impact/](https://yuka.io/impact/)

<sup>(20)</sup> [www.avise.org/ressources/rapport-de-levaluation-dimpact-des-maisons-des-familles](https://www.avise.org/ressources/rapport-de-levaluation-dimpact-des-maisons-des-familles)

- As part of their assistance programme for solidarity garages, Avise and the group PSA (now Stellantis) have developed an assessment and communication tool related to the social utility of **solidarity garages**, co-constructed with 21 organisations. It includes several personalisable, ready-to-print communication materials, making it possible to promote the results of the social utility assessment to different audiences (partners, donators, general public).<sup>(21)</sup>



## HOW TO INTERPRET A SOCIAL IMPACT ASSESSMENT REPORT?

Social impact assessment reports are frequently published. It is therefore important to know how to interpret the information they provide and develop a critical eye. The publication '*Mesure d'impact: pour un regard critique*' [Impact Measurement: Adopting a Critical Perspective] – produced in 2022 as part of the '*Petits Déjeuners de la Mesure d'Impact*' [Impact Measurement Breakfasts] led by Convergences, and jointly coordinated by Avise and Improve – suggests four insightful questions to consider when reading an assessment report:

- Are they really talking about the social impact (and not the results of the activity, for example)?
- Does the organisation really have a desire to generate an impact? How is this objective set out (presentation of the study's context, the stakeholders, the impact mapping, etc.)?
- Is the report transparent about the study's key elements (presentation of the method used, the study's limits and potential bias, the data analysis

methods, the intermediate results, etc.)?

- What will this assessment be used for (conclusions of the study, planned use of the results, strategic directions drawn from the work, etc.)?

To find out more: [www.avise.org/ressources/mesure-dimpact-pour-un-regard-critique](https://www.avise.org/ressources/mesure-dimpact-pour-un-regard-critique)

<sup>(21)</sup> [www.avise.org/ressources/comment-evaluer-et-communiquer-sur-lutilite-sociale-dun-garage-solidaire](https://www.avise.org/ressources/comment-evaluer-et-communiquer-sur-lutilite-sociale-dun-garage-solidaire)

## Use your results internally

In particular, assessment offers a way to reconsider the meaning of your activities, as part of a continuous improvement approach, and to guide future decision-making. The following questions can help you identify lessons to be drawn from the assessment for your activities.

### 1 Review the assessed action

- To what extent do the observed effects match the expected effects?
- Are there any unexpected impacts on the stakeholders?
- If so, are they positive or negative? Are they frequent? Are they significant?

### 2 Put the review of the assessed action into perspective

- Is this activity strategic or supplementary, established or new, etc.?
- Is the action reaching the target audiences? If not, why?
- Is the action effective in relation to its size in our activity?
- Are there significant human or financial resources dedicated to it?

### 3 Draw conclusions for your activities

- After gaining this perspective, what should we be continuing, stopping or relaunching?
- Do we need to change our activities or practices to achieve our objectives? If so, which ones and how?
- Do we need to turn to new audiences?
- Do we need to reallocate human or financial resources?
- Do we need to invest in our activities (training, tools, etc.)?
- Which partnerships do we need to strengthen? Which ones have limited utility and can be stopped? Which ones should we develop?

The publication '*Ceci n'est pas un guide*' [This Is Not a Guide] (VISES, 2020) provides an additional list of actions that you can carry out in the area of communication and action improvement, based on your assessment results.

*"The assessment approach enables a reconsideration of organisations' practices, looking at what is being done today and what could or will be done tomorrow.*

*This helps organisations improve their practices by becoming more professional."*

**CÉCILE MOREAU**  
PROJECT MANAGER  
INAÉ

## case study

### REDIRECTING YOUR ACTIVITIES FOLLOWING YOUR ASSESSMENT

Following on from the previous example, here are some prospects and changes of direction that could stem from assessment of the scheme dedicated to NEETs run by '*Jeugd en Stad*' (JES – Youth and City).

#### Review of the assessed action

This organisation plays a necessary and important role in the local area: among other things, its actions help to raise awareness of the aims of social and vocational integration among young beneficiaries. However, this observation is far more evident in young people who voluntarily join the scheme than in those who are sent by partners.

#### Putting the review of the assessed action into perspective

In the way it is set up, the activity does not meet the needs of young people sent to join the scheme by partners: the action currently has little effect on this section of the target audience.

#### Operational recommendation

The organisation should adapt its integration process for these specific situations. For example, it could be interesting to provide a dedicated integration process for young people who are sent to the scheme. Initial work would then involve analysing the specific situations and needs of these young people, in comparison with youths who join the scheme voluntarily.

*"The assessment strengthened our desire to make our governance more shared and give more power to our beneficiaries. For example, the BECOMTECH Ambassadors are currently creating a computer equipment grant, which they will administer, and would like to be involved in the recruitment of future trainers for the programme JUMP IN TECH."*

**DOROTHÉE ROCH**  
CO-FOUNDER AND DIRECTOR  
BECOMTECH

# SUSTAIN YOUR ASSESSMENT APPROACH

You have now reached the end of your first assessment approach: an accomplishment to be proud of! But this could just be the start of the journey...

## How to sustain your assessment approach?

At this stage, the aim is for assessment to become **a continuous process, integrated in the life of your organisation or project, and built for the long term.** This will enable you to continue to identify the outstanding features of your activities, make the right decisions, mobilise your stakeholders, and extend your reach by winning over new partners.

To achieve this, here are some tips and good practices:

- **Widely share lessons drawn** from your assessment process, both within and outside your organisation, to promote the approach and help improve practices.
- **Integrate a selection of key indicators into the management of your activities**, as well as the related data collection methods into your processes. This will enable you, without much extra effort, to continue to provide inputs for your thinking, detect any changes in your situation, simplify your accountability process, and so on. You will then be able to regularly present the trends of these results and their analysis (for example, in your activity reports, during general meetings or at seminars).
- **Accustom your teams** to social impact assessment, including its aims and contributions to your project, as well as the main stages in the process. By building knowledge of the topic, you can remove potential barriers to the integration of assessment in your everyday operations.

*"We have integrated our questionnaires into our standard practices, in order to regularly monitor our actions."*

**NADÈGE MONIEZ**  
DEPUTY DIRECTOR  
JOSÉPHINE



## case study

### CROIX-ROUGE FRANÇAISE, A TEAM DEDICATED TO SOCIAL IMPACT ASSESSMENT

The Croix-Rouge Française (French Red Cross) has been interested in assessing the social impact of its activities since 2010. Following several initial endeavours in this area, a Social Impact Measurement division was created in 2018, with two main objectives: on the one hand, to develop the organisation's capacity to assess the social impact of its activities throughout France and thereby support its strategic decision-making; on the other, to accustom its teams to assessing social impact, in order for them to participate in, and even launch, impact assessment approaches for their projects.

With this in mind, the division's teams carried out several actions, based on their experience, in order to share their skills with the organisation's employees and volunteers, and for the issue of social impact to become integrated into their practices. These included awareness-raising actions (videos, quarterly newsletter, presentations, etc.), and the provision of training and a toolbox (presentation of the stages in the approach, interview framework, final deliverable model, etc.).

Finally, the Croix-Rouge Française has gradually integrated impact measurement into all of their processes: impact indicators

have been added to the organisation's activity report, a dedicated training module is set to be integrated into its project management training courses, internal financing requests will include analysis of the proposed project's potential impact, and so on. In order to spread the social impact assessment culture even more widely within the teams, all of the tools produced by the Social Impact Measurement division are accessible via the Croix-Rouge Française internal portal.

**To find out more:**  
[www.croix-rouge.fr/La-Croix-Rouge/La-Croix-Rouge-francaise/Transformation-et-RSO](http://www.croix-rouge.fr/La-Croix-Rouge/La-Croix-Rouge-francaise/Transformation-et-RSO)



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# FURTHER READING

Selection of useful resources for people managing or assisting social enterprises. Most of the resources are available to download at [www.avise.org/ressources](http://www.avise.org/ressources).

## General resources

- AVISE, *National resource centre for social impact assessment* [online], [www.avise.org/evaluation-impact-social](http://www.avise.org/evaluation-impact-social)
- AVISE, 'Cartographie des acteurs de l'évaluation de l'impact social' [Mapping of Social Impact Assessment Actors] [online], [www.avise.org/ressources/cartographie-des-acteurs-de-levaluation-de-limpact-social-0](http://www.avise.org/ressources/cartographie-des-acteurs-de-levaluation-de-limpact-social-0)
- AVISE, handbook 'Évaluer l'impact social: un éclairage pour ceux qui financent les structures d'utilité sociale' [Assessing Social Impact: Explanations for Financers of Social Utility Organisations], 2017
- AVISE, CONVERGENCES, IMPROVE, 'Mesure d'impact: pour un regard critique' [Impact Measurement: Adopting a Critical Perspective], 2022
- AVISE, ESSEC, IMPACT FRANCE, 'Petit Précis #2 de l'évaluation de l'impact social' [Brief Handbook #2 of Social Impact Assessment], 2021
- OECD, 'Social Impact Measurement for the Social and Solidarity Economy', 2021
- TERRITOIRES INNOVANTS EN ÉCONOMIE SOCIALE ET SOLIDAIRE (TIESS), 'Évaluation et mesure d'impact en économie sociale' [Impact Measurement and Assessment in Social Economics] [online], [tiess.ca/evaluation-et-mesure-dimpact-en-economie-sociale](http://tiess.ca/evaluation-et-mesure-dimpact-en-economie-sociale)

## Methodological tools

- AVISE, CULTURE ET PROMOTION, 'Évaluer l'utilité sociale de son activité. Conduire une démarche d'auto-évaluation' [Assessing the Social Utility of Your Activity. Conducting a Self-Assessment Approach], 2007
- AVISE, FIDAREC, IMPROVE, practical guide 'Comment évaluer son impact? Principes méthodologiques' [How to Assess Your Impact? Methodological Principles], 2021
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**Coordinator and Editor:** Louise de Rochechouart

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# ASSESSING YOUR SOCIAL IMPACT

## **Why assess your social impact? In practical terms, how do you engage in this approach in a way that meets your aims and resources?**

Designed for SSE enterprise leaders and their teams, as well as providers of assistance and finance, this guide offers directions and tools for all those who wish to initiate a “first steps” approach to their social impact assessment, whatever their project’s state of progress. It shows you how to apply tools and methods that are suitable for your environment, your organisation, your aims and your resources.

In addition to defining and introducing social impact assessment aims, it provides practical tools to help you at each stage of the process, as well as concrete examples to inspire you and get you started. It is based on discussions with various actors (experts, SSE enterprise leaders, sector-wide networks, assistance providers and financiers) and on all the work that *Avisé* has carried out in the area of social impact assessment over a period of more than 20 years.



Avisé is a non-profit organisation based in Paris since 2002. Its mission is to develop SSE & social innovation in France and Europe by supporting project leaders & helping to establish an ecosystem favouring their development.

It coordinates action programmes covering every stage of social enterprise's life cycle. Its main objective is to drive essential change in our economy so as to make it more sustainable and more people-centric.

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