



Agence d'ingénierie pour  
entreprendre autrement

## *BIRDS Transfer session*

### Cap Impact training program

11/03/2026



Cofinancé par  
l'Union européenne

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## **Cap Impact training program**

**Context, intended audience & organisation**

# Cap Impact training program

## Objectives



### **Main goal: provide access to social impact assessment**

- For all social and solidarity economy support actors and organisations
- In all regions
- For different stages of an organisation's development
- Training done mostly online to ensure greater access



### **Targeted audience: SSE and social innovation support providers**

- Develop skills in social impact assessment
- Develop an alternative support offer to for-profit consultant firms



### **A training program dedicated to "first steps"**

- For beginners, not for experts
- Short-term program

# Cap Impact training program

## Organisation

### **14 hours total of training**

- 7.5 hours of online training
- 6.5 hours (one day) of in-person exercises

### **3 online training sessions in 6 weeks**

- Session 1: POTENTIAL - DETERMINE THE FOCUS OF THE ASSESSMENT
- Session 2: PROOF - MEASURE YOUR IMPACT
- Session 3: INTEGRATION - USE THE GATHERED DATA

### **1 day of practical application**

- Test and consolidate knowledge
- Discuss issues with others

## Objectives & methodology

### Training methodology: a practical "how to" approach



- **A project-oriented approach to impact assessment:** training oriented to the perspective of a support actor and project owner
- **A step-by-step dynamic**
- **A focus on easy-to-use tools**
- **Contribution of experts and peers:** testimonies and expertise

# Cap Impact training program

## Objectives & methodology

### Training tools



- ❑ **Online collaborative tools**  
Teams space and SharePoint for questions & messages, and recording of the sessions
- ❑ **Resources**  
Compilation of practical guides, reference materials, impact assessment reports
- ❑ **Use cases & co-development**  
Practical cases and adapted tools



*(Guidebook available on [avise.org](https://avise.org))*

## Tips and tricks

### Trainer's approach

- Debunking common misconceptions about social impact assessment:
  - Complexity
  - Only benefits funders
  - Only relevant for project reporting
- Key messages about how to use impact assessment:
  - Adaptive
  - Transformative
  - Learning
  - Reliable
- Neutrality:
  - on the choice of methods
  - on the use of resources

### Best practices

- Simplify the theoretical aspects, focus on the tools and a practical approach
- Focus on the perspective of the project owner or support actor
- Incorporate concrete, real-world examples
- Include first-hand testimonies from peers, experts, innovators or other relevant stakeholders
- Diversify the resources made available
- Provide best practices for each step
- For in-person exercises, focus on co-development exercises and small group work

# Sequencing of the training

## Following the three phases of impact assessment



**Introduction webinar:**

- What is social impact assessment and why do it;
- How to organize the process.



**1 POTENTIAL**

**Determine**  
the focus of the assessment:

- define the challenge for the assessment;
- map out the expected impacts;
- choose the assessment question.



**2 PROOF**

**Measure**  
changes generated by actions:

- choose the methodology;
- define indicators;
- collect data.



**3 INTEGRATION**

**Use**  
collected data:

- analyse gathered data;
- use results;
- sustain the approach.

## Shared structure

### Shared structure for all three sessions:

- Brief introduction and ice-breaker
- Presentation of the phase and the steps within it
- Definitions and theoretical content
- Tools and examples
- Testimonies and sharing of experience (peers or experts)



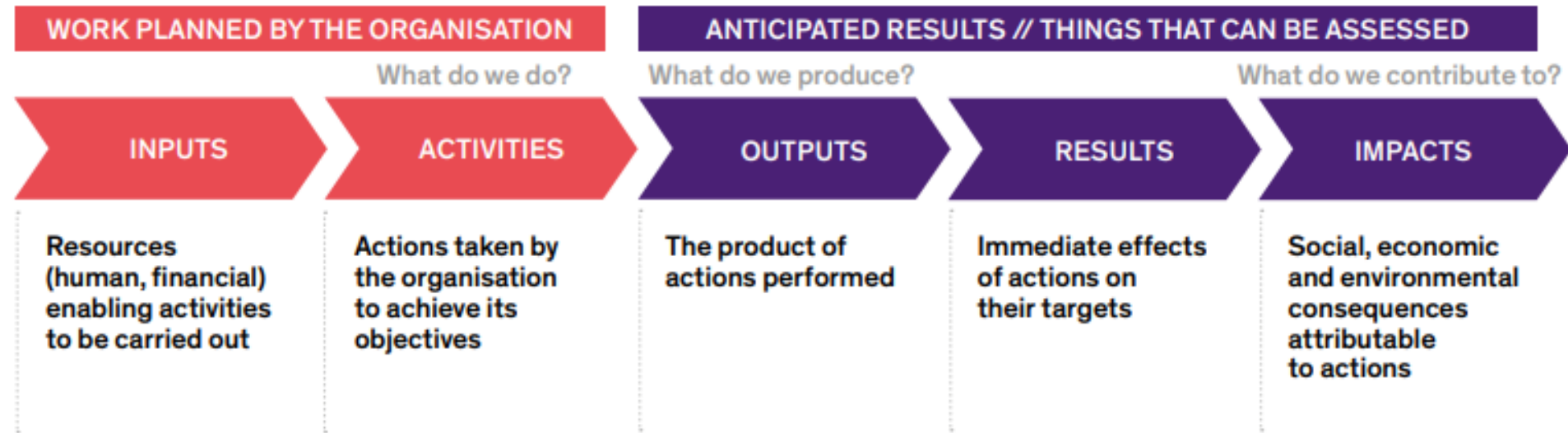
# Training content

**3 on-line sessions, 1 day of practice**



# Defining social impact

## 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

# Why conduct impact assessment?

**Better understand an environment and the effects of actions on beneficiaries**

**Motivate teams and create space for dialogue**

**Recognizing and valuing the work of employees and volunteers**

**Improve practices and fuel the search for innovative solutions**

**Communicate about actions and support advocacy**

**Secure financing or seek new financing**

**Provide proof of the social value created and the relevance of the project**



# **Session 1: Potentiel (preparing the assessment)**

**Project context, stakeholder mapping, theory of change**





# Session 1 – Activities

- 1. Set the context for the structure and define the assessment strategy**
- 2. Stakeholder mapping**
- 3. Theory of change/Impact mapping**
- 4. Define an evaluation question**

# Phase 1: Definitions and theoretical content



## What is social impact assessment?

Assessment is a process that consists of

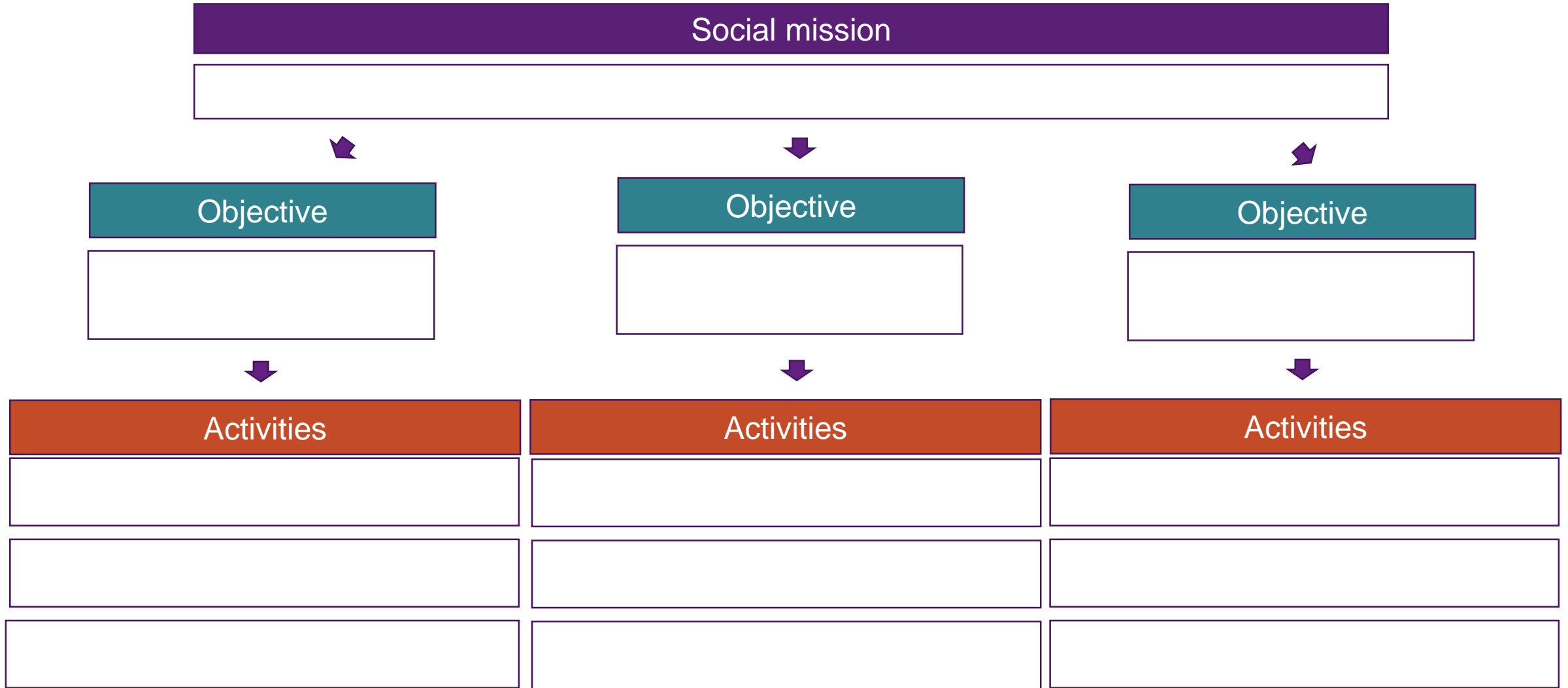
- **understanding, measuring, proving and promoting...**
- ...the positive and negative **effects** generated by an organisation on its environment.

- ▶ An often partial view of reality
- ▶ A participatory and transparent approach
- ▶ An ambition to be adjusted in light of constraints and strategy

# Phase 1: Tools



Tool: the project 'identity card'



# Phase 1: Tools



Tool: identifying assessment stakes

## Continuous improvement

- Consolidate my flagship programme by adapting it to the new needs of beneficiaries
- ...

## Internal use

## Motivation

- Foster reflection on the common objectives of several projects
- Demonstrate the legitimacy of an initiative in a given region
- ...

## Activities

- Demonstrate the effects of my programme on beneficiaries to my financial partner
- ...

## Vision

- Contribute to sector advocacy
- ...

## Accountability

## External use

## Advocacy

# Phase 1: Definitions and theoretical content



## What is a stakeholder?

- "A stakeholder in an organisation is any individual or group that can affect or be affected by the achievement of organisational objectives" (Freeman 1984).
- They may be: internal/external to the organisation, contributors/beneficiaries/affected by the organisation's actions

## Main types of stakeholders

- **Administrators:** members of the project governance team
- **Employees:** salaried members of the organisation who implement the project
- **Volunteers:** volunteers within the organisation who contribute to the implementation of the activity

INTERNAL

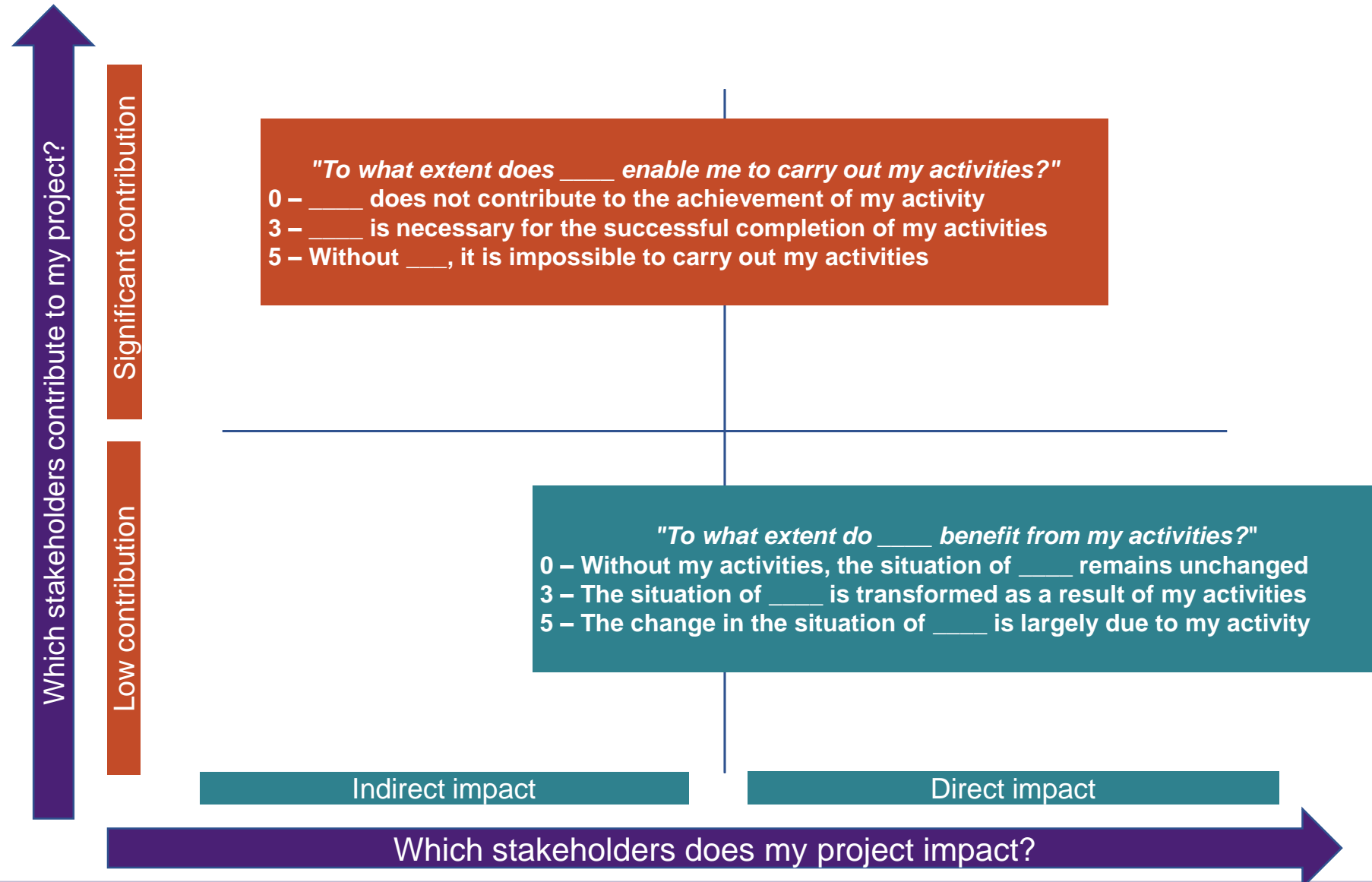
- **Beneficiaries:** individuals targeted as the final, direct or indirect beneficiaries of the activity
- **Funders:** public/private actors who support the project
- **Partner organisations:** operational and/or strategic partners in the activity (companies, other associations, residents, etc.)

EXTERNAL

# Identify and engage stakeholders



## Tool: Stakeholder mapping





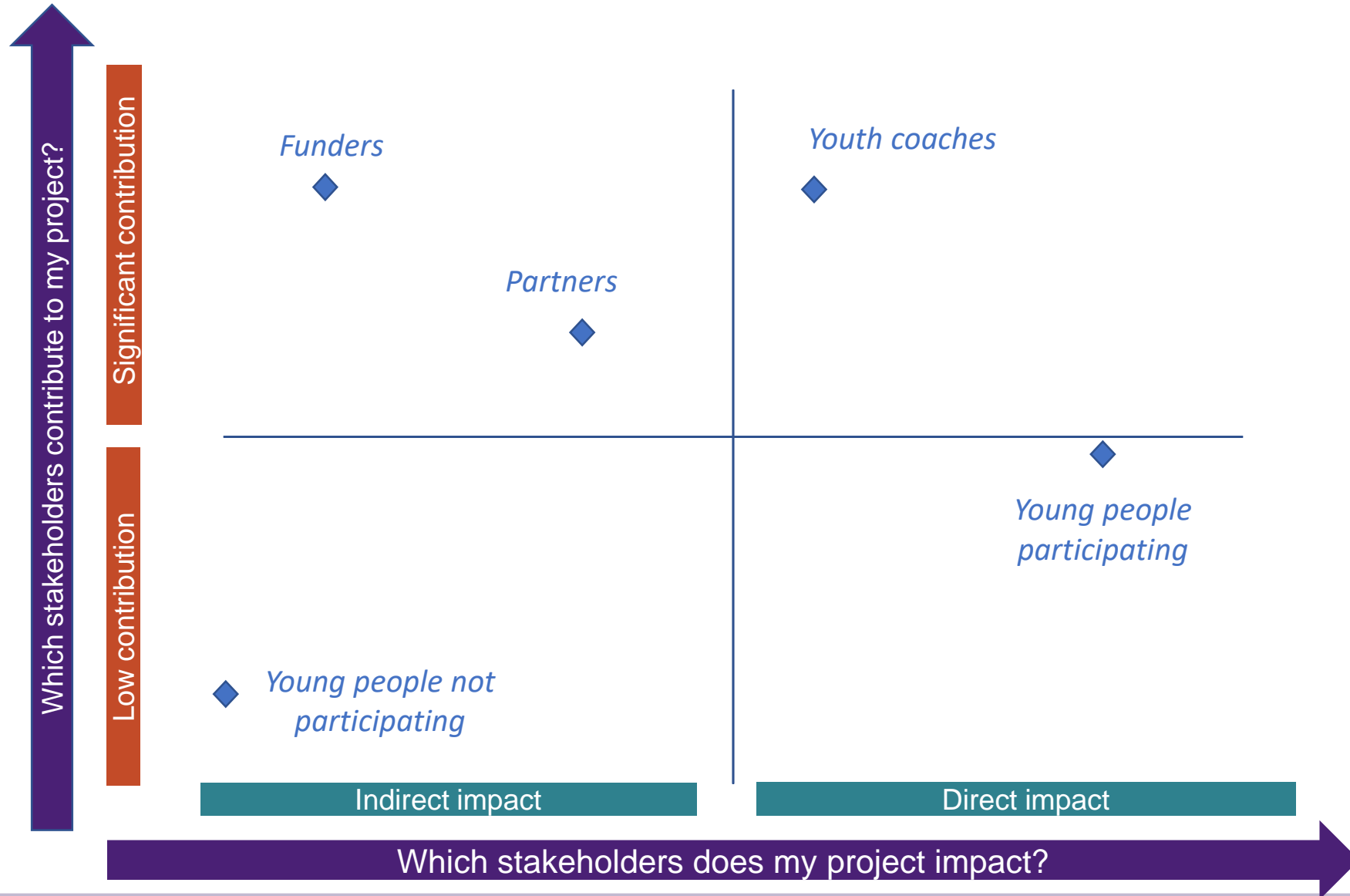
Example: community project "Young People in the City"

- **The "Young People in the City" project is a fictional project, loosely based on a Belgian project called "Jeung en Stadt".**
- **It is an integration programme for young people belonging to the "NEET" (Not in Education, Employment or Training) social category, i.e. young people who are not in education, employment or training.**
  - There are nearly 1 million NEET young people in France
- **The project aims to support young NEETs in urban areas.**
  - To help young people enter the labour market
  - Supporting young NEETs after their first professional experience

# Identify and involve stakeholders



Example: "Young People in the City" community project



# Identify the impacts to be targeted



What are the effects being mapped?

## Effects

*Effects are the direct and indirect changes, short- or long-term, expected or unexpected, that result from the activities implemented.*

- **Short-term effects:** The most immediate and easily observable changes
- **Medium-term effects:** Intermediate changes
- **Long-term effects:** Final change



Activities (what we do), practices (how we do it)

- ▶ The time frame **depends on each activity and structure**
- ▶ Effects may be described differently **depending on the stakeholders**



### The theory of change: what is it?

"A theory of change (ToC) is an explicitly documented (and therefore assessable) vision of how change is expected to occur." **Rick Davies**

- A way of describing how a group hopes to achieve a given long-term goal (Anderson, 2005)
- It is not a method designed specifically to measure impact, but serves as a tool to help develop solutions to complex social problems.

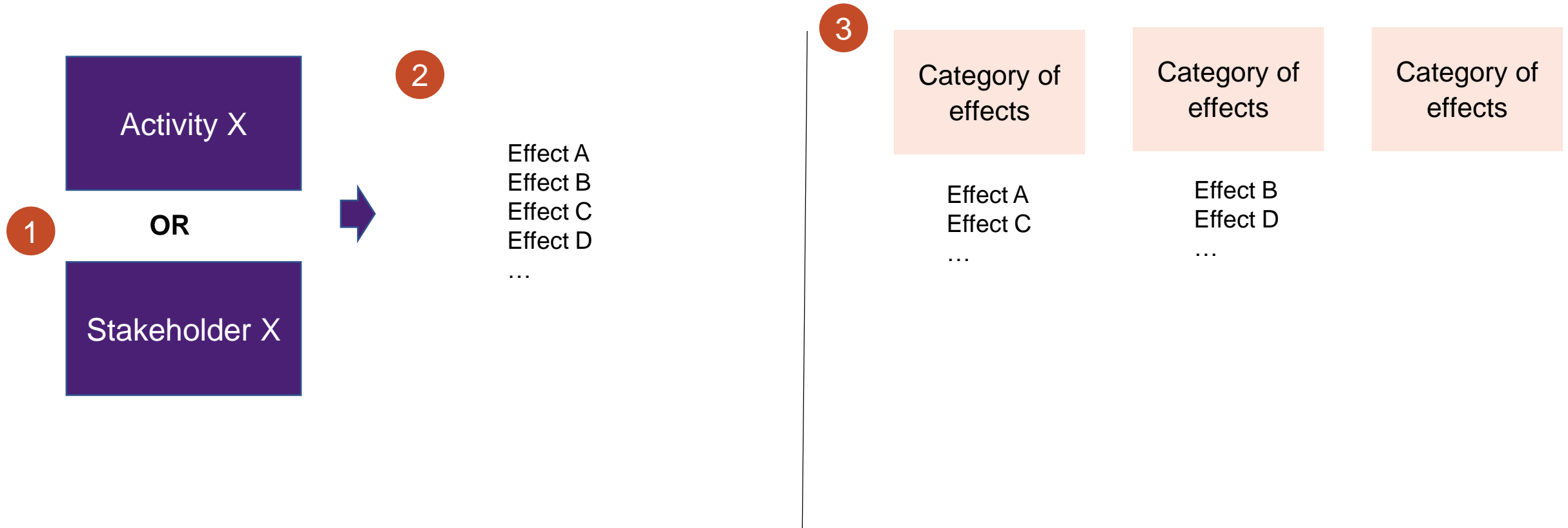
- ▶ Provides a clear understanding of what effects and how they affect stakeholders, with explicit links/correlations
- ▶ Facilitates the prioritisation of effects
- ▶ Strengthens impact assessment by ensuring the relevance and robustness of results
- ▶ Facilitates project promotion/advocacy

# Impact mapping



## Tool: identifying and categorising effects

- 1 Select an activity or stakeholder and list the actions taken
- 2 List the different effects (group discussion)
- 3 Identify the main categories of effects



# Impact mapping



## Example of the "Young People in the City" community project



# Developing a theory of change



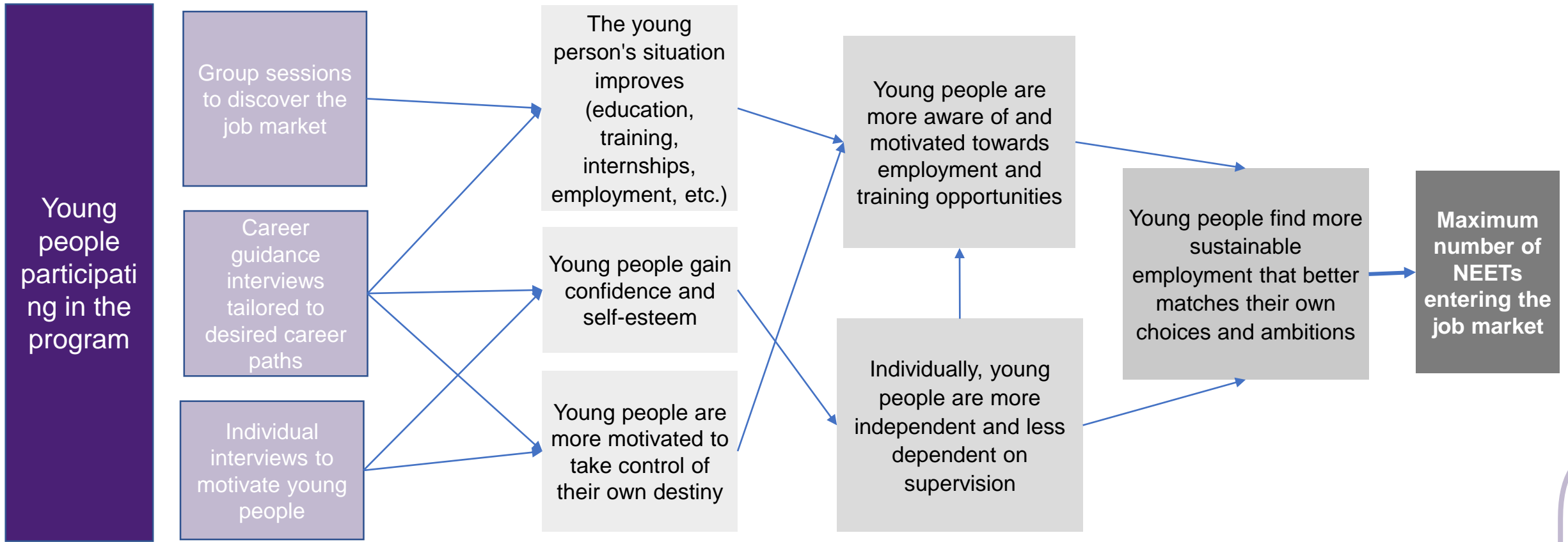
Example: "Young People in the City" community project

## Skills development and re-engagement activities

## Short term

## Mid-term

## Long term



# Defining an evaluative question



## Why and how to define an evaluative question?

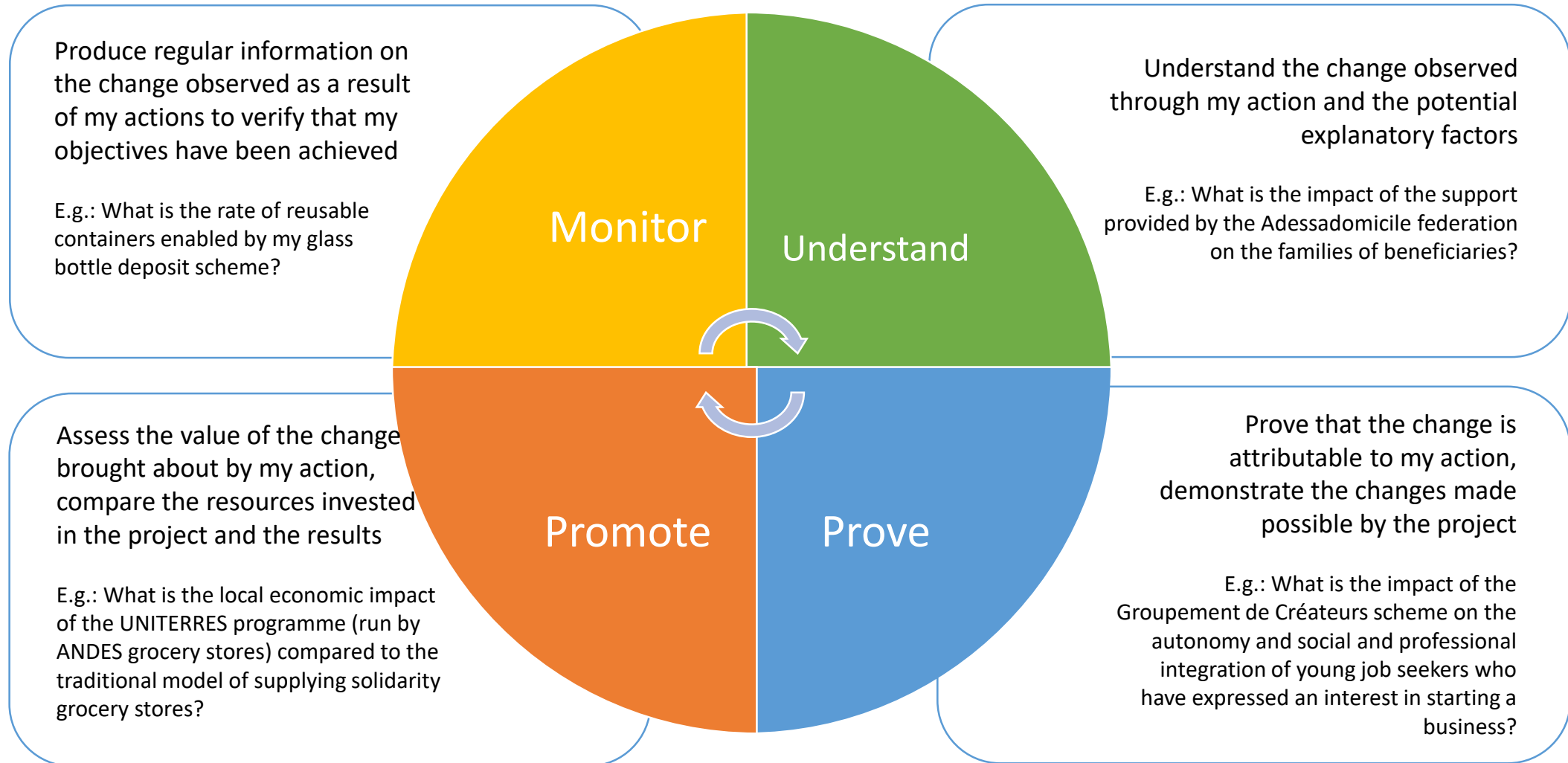
### The evaluative question: what is it?

- It allows you to define the purpose of the evaluation and the question it answers.
- It is defined on the basis of three elements: **the strategic issue** of the evaluation, the **effects identified** as priorities to be measured, and the **purpose** of the evaluation

# Defining an evaluative question



## Tool: 4-purpose compass for formulating your evaluation question





## **Session 2: Proof (measure changes)**

**Selection of indicators, data collection methods & tools**





## Session 2 – Activities

1. Defining your indicators
2. Familiarise yourself with the methods
3. Prepare your data collection
4. Carry out data collection



## Indicators: what, why and how?

### What is an indicator?

- An indicator specifies **the information that must be sought** in order to answer the evaluation question
- It can be used to collect **qualitative or quantitative data**
- There are **three categories of indicators**:
  - Indicators created specifically for the organisation
  - Standardised indicators (e.g. percentage of women in an organisation, employment rate of people with disabilities)
  - Sectoral indicators (e.g. positive exit rate for professional integration schemes)

► **It is not possible to measure everything**: through your evaluation question, you will prioritise the effects and/or conditions to be evaluated and select relevant indicators.

# Defining your indicators



## Choosing the right indicators: instructions for use

### Create the indicator

- Identify the information that, once collected, can be used to answer the evaluation question, i.e. **to measure the expected impact**
- For inspiration, consult **existing databases and reference frameworks**:
  - General reference frameworks: Valor'ESS, Sustainable Development Goals
  - Sector-specific benchmarks: food, justice, employment, social mediation

### Define a target value

- Define a **target for each indicator**:
  - a level of achievement relative to a starting point (or baseline)
  - a comprehension or monitoring objective, etc.

# Define your indicators



## Choosing the right indicators: what data is measured?

### What measurement: quantitative versus qualitative?

#### Qualitative



- Textual data (testimonials, exchanges, etc.)
- Interviews, focus groups, observations
- Measuring complex social impacts

#### Quantitative



- Statistical data (percentages, numbers, etc.)
- Survey
- Verify and evaluate

#### ► **Qualitative and quantitative data are complementary!**

It is advisable to carry out a qualitative measurement to identify/understand its impacts and a quantitative measurement to verify/consolidate.

### What data?



**Objective** (based on a factual situation)



**Subjective** (based on the perception of the respondent)



**Intersubjective** (based on the respondent's opinion of another person)

# Defining your indicators



Example: community project "Young People in the City"

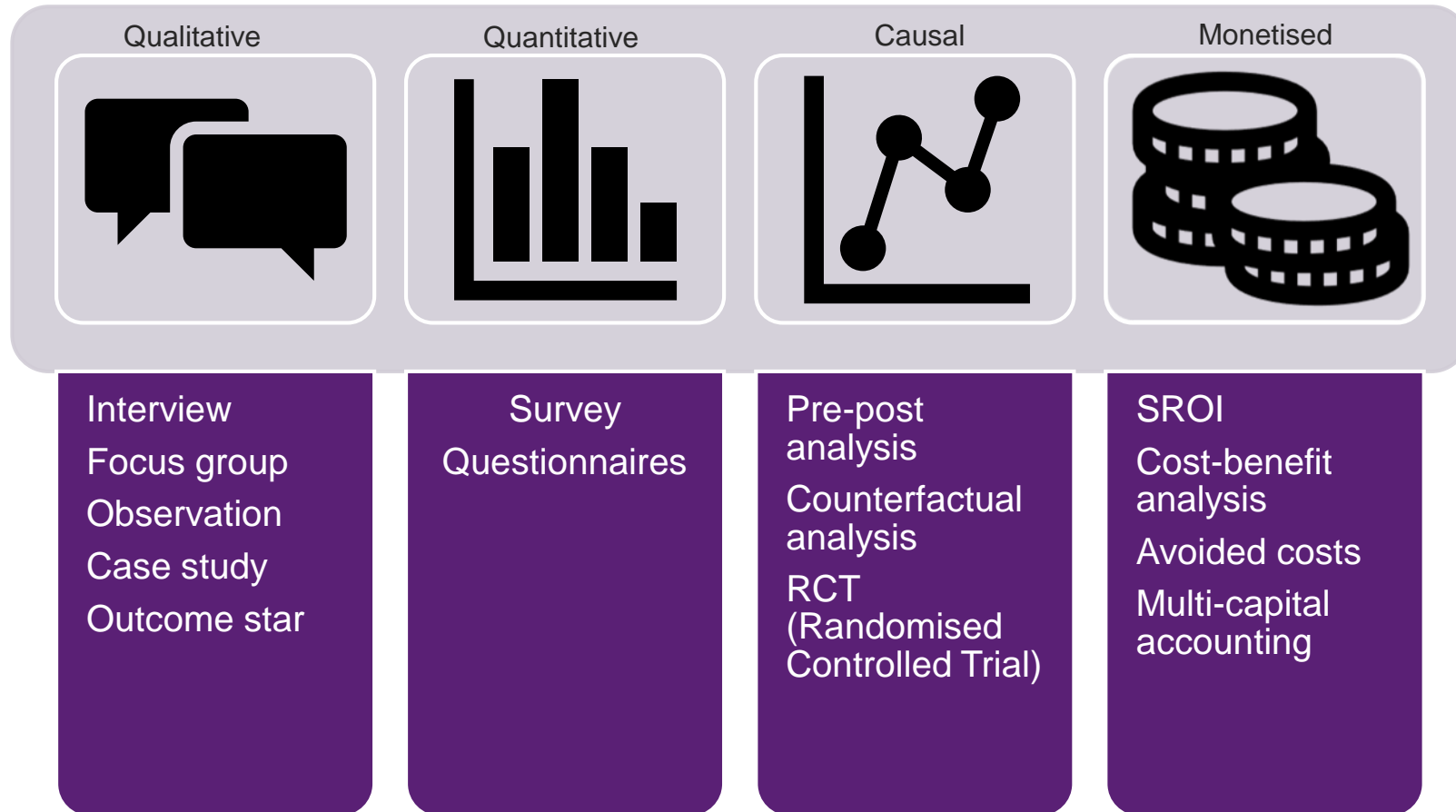
"How do the individual motivational interviews conducted help the young people involved to gain self-esteem?"

Effects to be assessed	Examples of indicators	Examples of target values
Young people gain self-esteem and confidence	Percentage of young people surveyed who acknowledge having greater confidence in their personal plans	At least half of young people report having gained greater confidence in their personal plans
	Improved confidence among young people in local support providers	Understanding approach: the aim is not to target a specific group, but rather to identify which local actors inspire confidence and how this confidence is expressed
	Percentage of young people who have more social interactions thanks to the activity	At least half of young people report having more social interactions with their peers and local actors
	Change in score on the Rosenberg self-esteem scale	This scale is based on 10 questions that establish a score – Target: define a minimum score at the end of the support programme

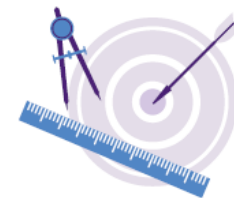
# Understanding methods and tools



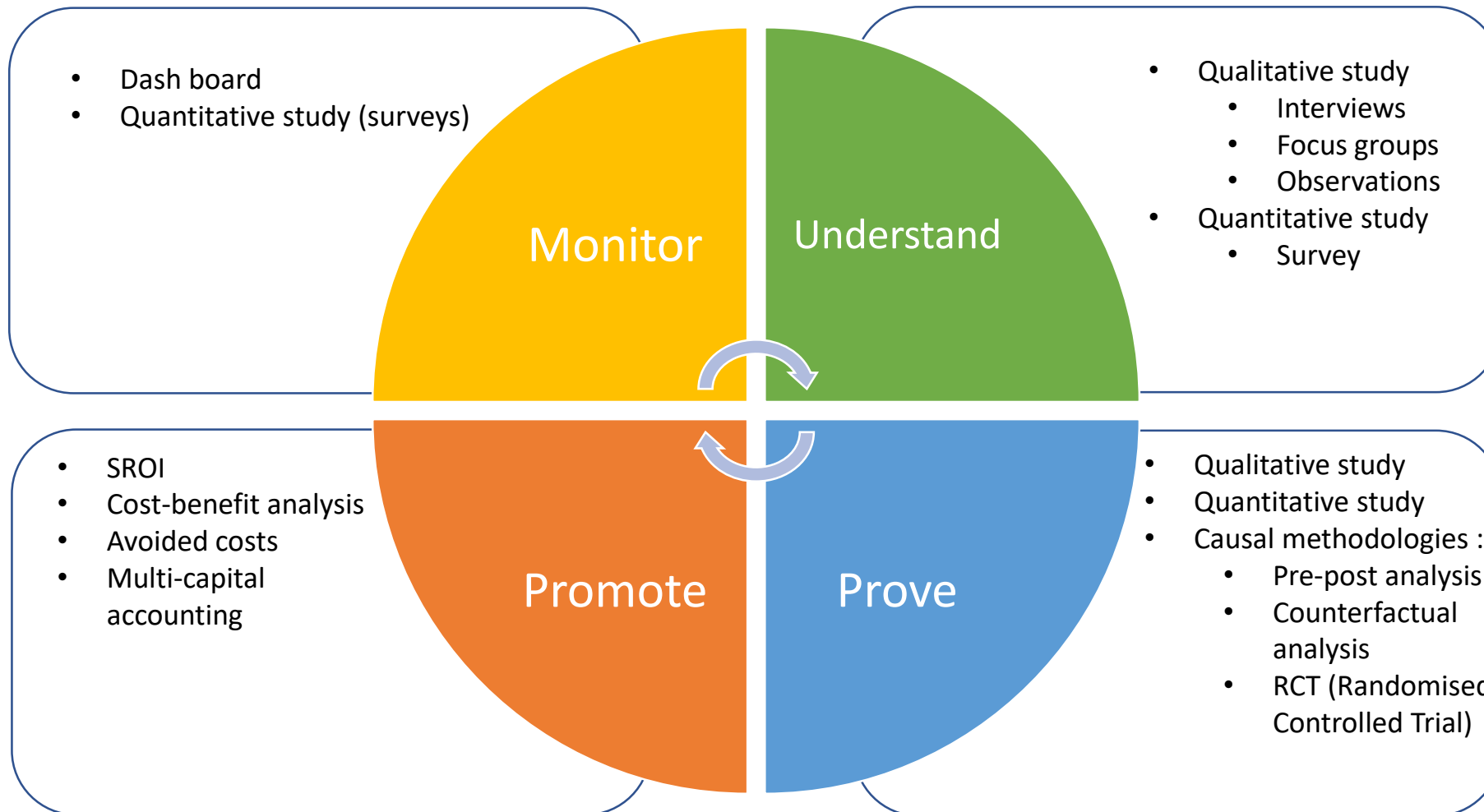
## Tool: Overview of the four main families of methods



# Choosing the right method



## Tool: 4-purpose compass for formulating your evaluation question





# **Session 3: Integration (analysing and using results)**

**Data analysis and interpretation, communications**





## Session 3 – Activities

1. Analyse the data
2. Interpret the results
3. Promote the results internally and externally
4. Draw inspiration from existing examples: examples of capitalisation



## How to analyse data?

### Take stock

**Sort and classify** the data collected

- Qualitative data: transcribe the interviews
- Quantitative data: compilation in a file

### Analyse

**Analyse** according to data type

- Qualitative data: for each stakeholder interviewed, compare the different interviews, identify similarities and differences; observe explanatory factors; collect verbatim quotes
- Quantitative data: calculate statistics; compare before/after

### Summarise

**Summarise** the results obtained

- For each indicator, gather the results (qualitative and quantitative) to answer the evaluation question

# Analyse the data



## Example: "Jeunes dans la ville" (Young People in the City) community project

### Selected indicators

Percentage of young people who have greater confidence in their personal plans

Improvement in young people's confidence in the various local support providers

Percentage of young people who have more social interactions thanks to the activity

### Summary of data analysis

- Overall, **beneficiaries** feel little change, with a marked difference depending on whether the young person entered the programme voluntarily or by referral. Young people who entered the programme voluntarily report having more confidence in themselves, representing 45% of those supported
- Overall, **educators** have noticed a change in the attitude of the young people receiving support, particularly in terms of the professional aspect of the support provided.
- **Local partners**, particularly those working more specifically with young people, have noticed that beneficiaries are more committed to their administrative procedures.
- All of **the partners** surveyed as part of the evaluation process describe the association as a necessary and indispensable local player in the socio-professional integration of young people in the region.
- At the start of the programme, only **a quarter** of the young people had social relationships outside their family and friends.
- After six months in the programme, more **than half of the young people (57%)** had at least several regular social interactions, particularly with sports associations in the neighbourhood.

# Interpreting the results



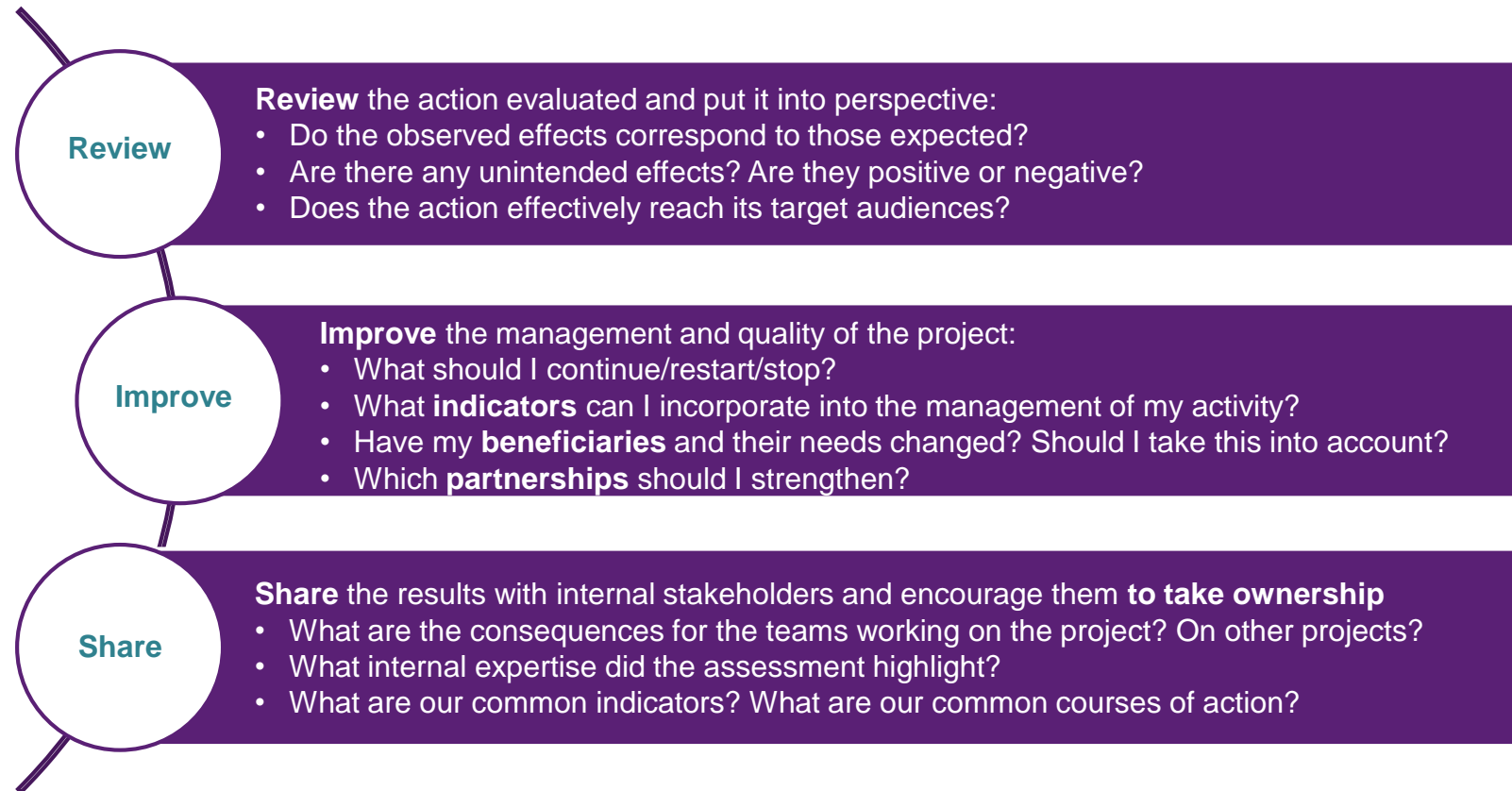
## Example: "Jeunes dans la ville" (Young People in the City) community project

Selected indicators	Summary of data analysis	Target values	Interpretation
Percentage of young people who have greater confidence in their personal plans	<ul style="list-style-type: none"><li>45% of young people receiving support report an improvement in their confidence in their plans</li><li>Educators have noticed a change in the attitude of young people receiving support, particularly in terms of professional guidance</li></ul>	>50%	While some of the young people surveyed find it difficult to assess their feelings, <b>those who joined the programme voluntarily have gained confidence in their project. The educational team (3 out of 4 educators)</b> confirms a change in the young people's attitude...
Improvement in young people's confidence in the various local support providers	<ul style="list-style-type: none"><li>Local partners have noticed a stronger commitment from beneficiaries.</li><li>All of the partners surveyed as part of the evaluation process describe the association as a necessary and indispensable local player in the socio-professional integration of young people in the region.</li></ul>	Understanding	Young people are <b>more engaged</b> in their administrative procedures with local support providers... This highlights the importance of the association and the programme's local roots...
Percentage of young people who have more social interactions thanks to the activity	<ul style="list-style-type: none"><li>At the start of the programme, only a quarter of the young people had social relationships outside their family and friends.</li><li>After six months in the programme, 57% of young people had at least several regular social interactions, particularly with sports associations in the neighbourhood.</li></ul>	>50%	Thanks to the programme, the young beneficiaries have improved their social interactions: <b>more than one in two young people</b> have had regular exchanges with people outside their family circle...

# Using the results internally



## How can the results be used internally?



# Using the results internally



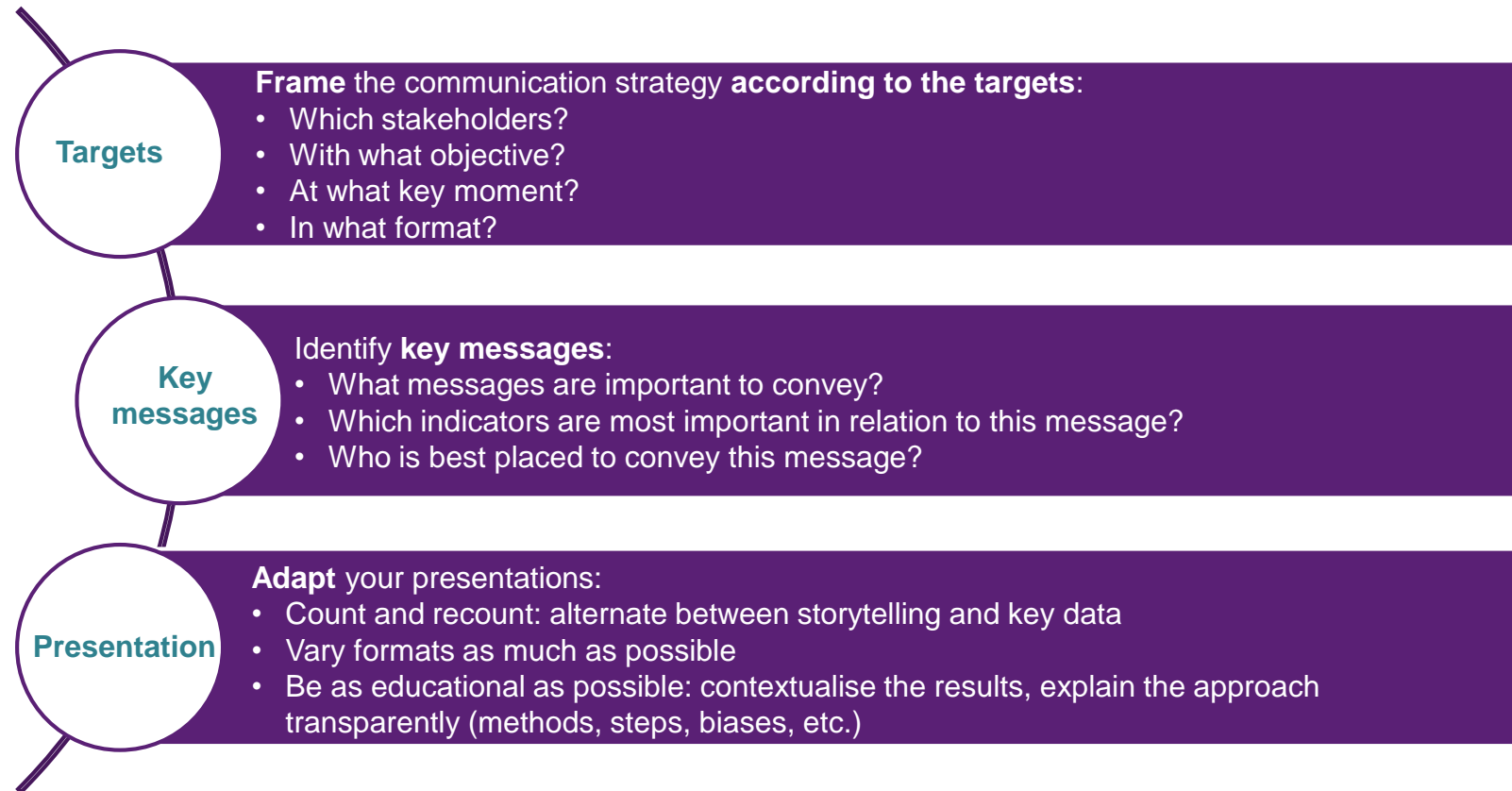
Example: "Young People in the City" community project

Assessment	Improvement	Ownership
<ul style="list-style-type: none"><li>• The activity enables the young people involved to develop new social interactions</li><li>• It helps to improve the self-confidence of young people who voluntarily join the programme, but less so for those who are referred to it</li><li>• The activities carried out by the association are recognised by all stakeholders in the region as promoting the professional integration of young people at the local level</li></ul>	<ul style="list-style-type: none"><li>• Creation of two programmes or adaptation of the programme to the two target groups</li><li>• Analysis of the specific needs and situations of young people who join the programme on referral</li></ul>	<ul style="list-style-type: none"><li>• Presentation of results at the association's annual seminar</li><li>• Organisation of a workshop to share the teams' expertise on the link with the region</li><li>• Organisation of a working group to address the needs of the target audience</li></ul>

# Using results externally



## How can the results be used externally?



# Using the results externally



## Example: "Young People in the City" community project

Who should I share this with?	What are the key messages?	When?	On which media?	For what purpose(s)?	Who is doing it?
Funding	Impact on young beneficiaries in terms of social interaction and confidence	Annual programme closing meeting and renegotiation	Very brief presentation; key figures and a few quotes	Convince, obtain funding to continue the project	Manager and impact advisor
Executive committee	Impact on beneficiaries and areas for improvement Areas for partner collaboration	Monthly meeting	Presentation of key impact figures and shared examples/testimonials Areas for improvement explained	Demonstrate and promote the project to develop it, provide concrete examples	Impact advisor or project manager/project leader Partner
Teams	Programme success and areas for collective improvement	Team seminar or dedicated workshop	Presentation, workshops, beneficiary testimonials	Contextualise, highlight internal benefits	Impact advisor or project manager/project leader Beneficiaries



# **In-person workshop session**

**Test, put into practice, and share**



## Organisation

### 5-6 hours of training

### 2 workshops based on use cases

- Workshop 1: phase 1 – impact mapping and evaluation question
- Workshop 2: phase 2 – indicators

### 2 cases of co-development

- Case 1: What indicators can we use to measure "intangible" elements such as the integration of our values by project leaders?
- Case 2: How can we identify the effects of a support programme during the emergence phase, taking into account the diversity of social utility projects?



## Methodology & tools

- ❑ **2 groups**
- ❑ **Role-playing (a project manager and a support actors)**
- ❑ **2 Use cases**
  - ❑ A portfolio : description of the use case, tools presented in the sessions, documents to help select or design indicators
  - ❑ Visionboard : to map the phases and activities they were working on
  - ❑ « Setback Cards »
- ❑ **Co-development**

### Cas pratique

*La Clef* est une structure associative (association de 1901) créée il y a 2 ans. Elle emploie 3 personnes salariées à temps plein et mobilise une dizaine de bénévoles à l'échelle de sa commune d'implantation.

*La Clef* porte un projet d'habitat inclusif pour les personnes âgées en perte d'autonomie physique et cognitive, impliquant les familles de ces derniers. 2 activités principales :

- Une activité d'hébergement dans un habitat partagé qui occupe 2 salariés référents (1 cheffe de projet et 1 personne formée aux soins infirmiers)
- Une activité d'animation dans et hors les murs impliquant notamment les personnes hébergées, les jeunes de la commune, 2 associations locales (1 structure de gestion d'un jardin partagé et 1 club de sport) coordonnée par 1 cheffe de projet en lien avec les bénévoles.

Les 2 partenaires principaux (la collectivité territoriale et un investisseur privé ) demandent une évaluation d'impact ; il y a aussi un besoin de donner de la visibilité sur les activités de l'association pour la faire connaître.

L'association dispose de 1 an pour réaliser la démarche.

Le porteur de projet n'a jamais réalisé de démarche, et ne se sent pas en maîtrise des outils qui existent. Les équipes sont enthousiastes par rapport à la démarche mais très fortement mobilisées sur les activités et les Appels à projet.



Cap Impact 

« Coup de  
pression »

*Votre financeur veut  
voir des résultats  
intermédiaires en  
amont*

Cap Impact 

« Kézako »

*L'équipe portera une  
partie de la mesure  
(entretiens) : elle ne  
se sent pas légitime et  
doit être sensibilisée  
et outillée*

Cap Impact 

« Blocus »

*L'équipe se  
désengage et doit  
être remobilisée sur  
le sens et l'utilité de  
la démarche*

# Testimonies from participants (2025)



## What did you learn?

*“That the impact assessment is a unique process for each project, depending on the strategic objectives. That there is no ”right answer“ and that it is an excellent basis for collective discussion within an organization and with partners and beneficiaries ”*

*“ Clearly define your needs and internal bandwidth” before getting started ”*

*“(…) the three key steps in impact assessment and the importance of defining the objective (an essential step, in my opinion) ”*

*“Listen, adapt the method to each situation.”*

*“That in terms of impact, what matters is the journey rather than the results, and that the process is iterative ”*

*“The method is really very good. The step-by-step guide is very clear and the practical day is really essential. The fact that you leave with a small booklet is also very useful. You can take it with you when you accompany clients as a discussion aid. “*

*“The strategic compass is an excellent starting point for framing the approach and the importance of making choices!”*



## Impact on participants years later

**Why did you do the training?** “We hear a lot about evaluation, but here we were able to learn how to do it for real, how to organize ourselves, and how to give **realistic and achievable advice** for the projects we support.”

**What did you learn?:** “The purpose of evaluation. At first, we see a purpose that is externally oriented; we want to promote what we do, but ultimately we realize that it is also an opportunity to understand **how it will serve us internally.**”

Then, we see that we need to narrow the scope of the evaluation, otherwise we will drown. We want to evaluate everything, but in the training we understood that we mustn't dilute the evaluation by making it too broad. We feel that all indicators are extremely interesting, but we learned in the training to distinguish between what is interesting and **what is essential to measure.**”

**Why did you do the training?** “To learn how to use the tools, because there are lots of resources available, but also to find my way around them. Sometimes we have a lot of information but don't know **how to go about working on the topic without being a specialist.**”

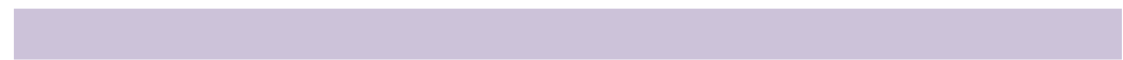
**What did you learn?** “I was able to learn about a number of tools, understand the different phases, and **how to use tools in relation to different goals or needs.**”

For example, the theory of change, enriches my thinking about my role as a support provider and it feeds into the way I question what the organization is trying to achieve. Sometimes associations lose their way a little, and impact assessment can provide **keys to understanding these issues and how the organization can reclaim its project and identity.**

Even if the request comes from a funder, we can benefit from this as a project”



# Merci !



# Des acteurs s'engagent pour l'ESS et l'innovation sociale

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