SUPPORTING **SOCIAL IMPACT ASSESSMENT**

A Handbook for Social Innovation Decision-Makers

avise

BiRDS
Boosting Initiatives & Resources to Develop Social innovation

Co-funded by the European Union

Social Innovation Initiative

Produced by the National competence centers for social innovation of France, Sweden, Portugal and Spain, this handbook is intended for social innovation decision-makers, mainly policy makers and funders (including European Social Fund+ managing authorities).

It's aim: **encourage support for impact assessment,** moving beyond compliance reporting toward genuine evidence-based practice. It offers methodological guidance, examples and concrete actions to better support social impact assessment. It can be used to start conversations with project teams, align practices with peers, challenge processes, and ultimately make better-informed decisions about **how to invest in social change.**

Designated by the European Commission and each EU member state, the National competence centers for social innovation (NCCSI) develop, with the support of the European Social Fund+, a strategy to promote social innovation, foster synergies between stakeholders and direct them towards relevant funding.

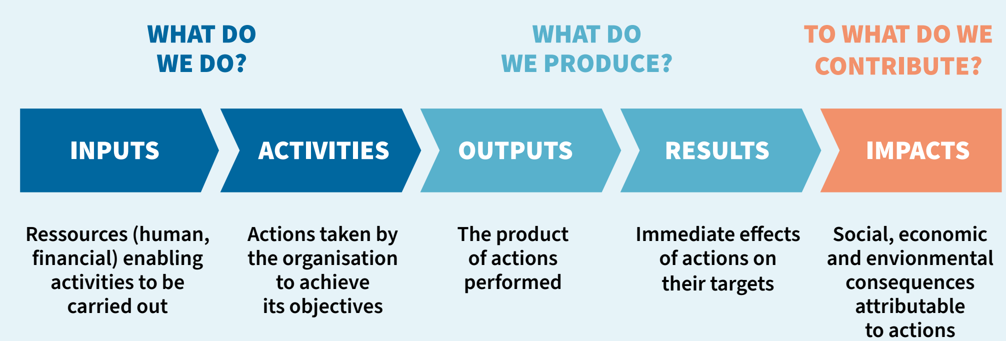
> **"The added value of social impact measurement lies in offering actionable information [...] Social impact measurement can help ensure that public resources and other forms of support to social and solidarity economy entities lead to the intended positive social outcomes"**
>
> **– OECD, 2021**

DEFINING IMPACT ASSESSMENT

The concept of social impact is attracting growing interest internationally, both from the social economy and from traditional businesses. Generally speaking, impact assessment is the process of **understanding and measuring the effects** generated by a project or organisation onto its stakeholders, both internal (employees, volunteers) and external (direct beneficiaries, indirect beneficiaries, local community, environment). It encompasses all changes, positive or negative, expected or unexpected, that are directly attributable to the project's activities.

Impact assessment focuses on the **changes generated** by an action – what it contributes to – not what it produces. This makes it distinct from practices such as monitoring and reporting (which track outputs and results) and from Corporate social responsibility (CSR) or Environmental social and governance (ESG) practices (which focus on an organisation's internal processes). These distinctions can be understood in terms of an organisation's **impact value chain.**

IMPACT VALUE CHAIN



Source: EVPA, 'Guide pratique pour la mesure et la gestion de l'impact'. (A practical Guide to Impact Measurement and Management), 2015

CONDUCTING IMPACT ASSESSMENT

Impact assessment is a comprehensive process that extends well beyond mere data collection. Practices can vary greatly in terms of the methods and tools used, their duration, their scope, and the resources required. However, all impact assessments are comprised of **three main phases.**

1 › DESIGN	**Defining the context and purpose of the assessment**
2 › MEASURE	**Collecting data to measure changes**

During the measurement phase, different data collection methods can be used.

QUANTITATIVE DATA COLLECTION	**QUALITATIVE DATA COLLECTION**	**VALUATION OR MONETISATION METHODS**	**COUNTERFACTUAL METHODS**
surveys, questionnaires, statistics	interviews, focus groups, case studies	social return on investment, cost-benefit analysis	Randomized control trials, counterfactual analysis

3 › LEARN	**Using the data collected for internal learning and external advocacy**

There is **no one collectively agreed-upon best method** for impact assessment. The choice of method will depend on the strategic and operational goals of the assessment, the resources available, and the technical capacity of those conducting the assessment. Most social innovation projects in Europe use an approach based on a theory of change and mixed methods (qualitative and quantitative) known as "realist evaluation". Realist evaluation is centered on learning: it seeks to explain how and why effects occur, by examining the specific mechanisms at play and the conditions under which they lead to change.

USING IMPACT DATA **AS A FUNDER OR POLICY-MAKER**

A STRUCTURAL TENSION

Funders must assess a portfolio of diverse social innovation projects through a common lens, in order to compare solutions and identify the most relevant ones — while preserving the specificity of each project (responses tailored to precise needs).

STANDARDISED APPROACH

Using indicators that are shared among several projects makes it easier to compare them and make decisions as well as simplifying reporting processes.

SPECIFIC APPROACH

Each project has its own evaluation with its own indicators, providing a more nuanced and precise understanding of the impacts generated and changes needed.

THE LIMITS OF STANDARDISATION

This simplified approach is insufficient for assessing the full scope of impacts generated. Standardised indicators measure performance, not transformation — they create incentives to optimise the numbers rather than the practices.

THE LIMITS OF SPECIFICITY

This more complete approach makes comparison and data aggregation difficult. Without a shared framework, it is hard to draw lessons at portfolio level.

A WAY FORWARD

Funders develop a theory of change (the intended social change and its mechanisms) at portfolio level. Establishing a small number of shared strategic indicators, combined with indicators contextualised to each project, makes it possible to achieve both comparison and support.

WHY IMPACT ASSESSMENT **MATTERS**

Impact assessment makes it possible to **define, measure and attribute** social and environmental value, helping organisations deliver on their mission and demonstrating how social innovation drives systemic change.

62.2%

of European social enterprises measure their impact, an additional 22.2% plan to do so in future.

Source: European Social Enterprise Monitor 2023-2024

For social innovation projects and their owners

- **Understand** how actual change is created, what works and what needs improvement.
- **Improve and innovate,** based on concrete results.
- **Build capacity** among teams in strategic planning, data collection and results-based management.
- **Strengthen relationships** with internal teams, beneficiaries and partners through the participatory process.

For beneficiaries of projects

- **Receive improved services** that better correspond to needs and contexts.
- **Feel heard and valued** by sharing experiences and participating in the assessment process.

For funding partners

- **Align with project owners through a shared vision** of the change created by the project.
- **Strategically allocate funds and resources** to projects according to an in-depth understanding of what works and why.
- **Track progress over time** to gain comparable insights and prepare to scale a project.

For policymakers

- **Enhance effective decision-making** on social policy based on proven outcomes regarding social challenges and their solutions.
- **Coordinate actions** based on a better understanding of how initiatives interact with one another to contribute to local policies and strengthen communities.
- **Demonstrate accountability and transparency** as to how public resources translate into social value.

IMPACT ASSESSMENT **IN PRACTICE**

For scaling social innovation projects and strengthening public policy

FRANCE

The Territoires Zéro Chômeur de Longue Durée (TZCLD) project

Launched in 2016, the TZCLD project aims to demonstrate that it is possible, at a local scale, to offer a permanent job contract to every person who has been in long-term unemployment.

The initiative drew on a macroeconomic study estimating the cost of long-term unemployment to build an **evidence-based case for decision-makers and funders.** Impact results also demonstrated the experiment's broader social value: 60% of beneficiaries, who had been unemployed for an average of 54 months, successfully exited long-term unemployment. Since 2020 the assessment has expanded to include other effects: employment beyond direct beneficiaries, quality of life, inequalities, and sustainable development.

These assessments helped secure unanimous passage of an experimental law by French parliament in 2016, and its extension to at least fifty new territories in 2020. A third law, adopted unanimously by the National Assembly in January 2026 to make the experiment permanent, was amended by the Senate in June 2026 and now awaits a second reading. In this way, impact assessment made it possible to advocate effectively for establishing the experimental project into French public policy regarding employment.

SPAIN

The VIDAS platform

The Vidas platform - promoted by the Spanish Ministry of Social Rights, Consumer Affairs and the 2030 Agenda - developed its first innovation portfolio in the field of care through 19 pilot projects (2022–2024), with a mission to advance community-based, deinstitutionalised care. A second phase of 35 projects co-financed by European Social Fund+ was launched in 2026 covering child protection, disability, elderly care, homelessness and independent living.

Impact assessment was designed as a **continuous process embedded** within the project itself, rather than a final measurement. As a result, a significant number of these innovations have been **transferred or scaled** through new project calls launched by regional or local administrations, or through direct incorporation into these administrations' service portfolios. Likewise, learnings from these impact assessments have been reflected in the draft bill amending the disability and dependency legislation.

*An **innovation portfolio** addresses complex challenges by connecting multiple interdependent initiatives (innovations, experiences, key learnings) to identify patterns that enhance overall impact and to create the architecture for experimentation and decision-making.

HOW TO SUPPORT THE DEVELOPMENT OF IMPACT ASSESSMENT

PROVIDE FUNDING

Project owners across countries cite economic costs as the main obstacle to impact assessment. As such, providing financial support specifically for this practice is an essential need for develo-ping innovation and ultimately providing needed services for citizens.

Structure financing in multi-year cycles
rather than annual grants, creating the conditions necessary to generate and track meaningful impact over time.

Adapt expectations and resources provided
according to each organisation's stage of development and theory of change complexity, rather than applying uniform standards across a portfolio.

Dedicate specific budget lines to impact assessment,
treating it as a core funding commitment rather than an afterthought.

PROVIDE NON-FINANCIAL SUPPORT

Funding alone is rarely sufficient to build robust impact assessment practices. Decision-makers can play a transformative role by offering structured non-financial support that is accessible and tailored to the means and goals of social innovations.

Prioritise flexibility,
allowing project owners to adapt their impact indicators and approaches to actual project needs (how and why change happens) rather than imposing rigid, pre-designed frameworks (whether a numerical target was met).

Invest in training and skills development
for organisations of varying sizes and maturity, embedded from the outset, not treated as an optional add-on.

Invest in shared assessment infrastructure:
common frameworks, open-source tools or databases, and peer-learning networks or mentorships, to build capacity while reducing costs at portfolio level.

MANAGE BY IMPACT

Often impact reports are produced and shared but not used to inform strategic decisions either internally or externally to the project. Impact management means using impact assessment results actively to inform strategy, not just compile reports.

Treat impact assessment results as decision-support tools, not miracle solutions.
Impact results enhance learning and transparency, but meaningful growth requires combining them with strategic dialogue.

Design assessments to capture the full picture
by including unintended or negative effects and the long-term analysis of dynamics (not just short-term outcomes) to support more sustainable choices.

Embed assessments into formal decision-making structures
(steering committees, board meetings, other governance bodies), and translate impact results into a strategic vision when communicating them.

COOPERATE

Cooperation counters the fragmentation (siloed funding, disconnected initiatives, short-term thinking) that can limit res-ponses to social challenges. It operates at two levels: between decision-makers and the projects they support, and among decision-makers themselves.

Address impact assessment early in the partnership,
adapting to the project's key milestones and the funder's own timeline.

Co-define impact goals, frameworks and indicators with projects
to ensure that what gets measured is meaningful to all stakeholders.

Treat poor or mixed results as a starting point for dialogue,
rather than grounds for immediate defunding.

Coordinate among decision-makers:
actively align on shared goals, pool resources, and data where possible.

Establish a clear theory of change at the funder or policy level,
articulating what effects are expected and how, applying the same strategic clarity expected from projects.

IMPACT ASSESSMENT **IN PRACTICE**

For scaling social innovation projects and strengthening public policy

SWEDEN

The Combined training (Yrkes-SFI) program

Yrkes-SFI began as a cluster of local and regional projects across Sweden, co-funded by the European Social Fund+, sharing one mission: accelerating migrants' and foreign-born people's path to the labour market by combining language learning with practical vocational training.

Impact assessments — drawing on longitudinal data from Statistics Sweden (SCB) alongside regional project evaluations — tracked completion rates, language progression, transitions into employment or further education. The evidence was compelling: integrated training accelerated both language acquisition and labour market entry compared to traditional, sequential interventions, with post-completion employment rates reaching nearly 50% within one year. The evaluations also confirmed that the cross-sector collaboration model (spanning municipalities, the public employment services, and local employers) worked in practice.

The results were convincing enough that the Swedish National Agency for Education was commissioned to spread and integrate the model nationally. What started as scattered pilots became **durable, nationally embedded policy:** combined language-and-vocational training is now a permanent, established part of the Swedish education system.

PORTUGAL

Academia de Sonhos Fora de Portas / Social Prescribing initiative

The Academia de Sonhos Fora de Portas project, funded by la Caixa Foundation, piloted Portugal's Social Prescribing model. Social prescribing is an integrated, person-centred approach that links primary healthcare, social services, and community resources for vulnerable people. Family doctors refer patients to community activities alongside clinical care, promoting active ageing, social participation and the prevention of isolation.

Impact assessment was built into the project from the start through a structured framework using internationally validated instruments to track changes in well-being, vitality, social participation and quality of life. The results provided robust evidence of statistically significant improvements among beneficiaries, confirming the model's effectiveness.

Healthcare professionals widely recognised gains in patients' functional status and community participation, which drove an increase in referrals and supported the shift from a pilot project to a nationally backed initiative. The success of these community interventions provided a **transferable and scalable model** for social prescribing, leading to the Social Innovation and Entrepreneurship Initiative (IIES), supported by the Portugal Social Innovation Mission Structure through blended public–private funding

FURTHER READING

Avise,
French National ressource center on impact assessment

Avise (2015),
Social innovation handbook

Avise (2015),
Social innovation characterization grid

Avise (2024),
Assessing your social impact

Better evaluation knowledge platform

BIRDS (2025),
"Transnational comparisons: social impact assessment ecosystems and practices"

OECD (2023),
Policy Guide on Social Impact Measurement for the Social and Solidarity Economy, Local Economic and Employment Development (LEED), OECD Publishing, Paris

OECD/European Union (2024),
Measure, Manage and Maximise Your Impact: A Guide for the Social Economy, Local Economic and Employment Development (LEED), OECD Publishing, Paris

GLOSSARY

European Social Fund+ (ESF+)
The European Union's financial instrument for funding projects across European Union member states to improve employment opportunities, promote social inclusion, and support education and skills training, particularly for disadvantaged groups.

Impact
The positive or negative, intended or unintended effects on stakeholders as a result of an intervention. The ultimate social, environmental, or economic benefits delivered to communities or target groups.

Impact assessment
The processes of collecting, analysing and interpreting information regarding the impact results of an intervention in order to understand effectiveness and areas for improvement.

Social economy
A sector comprising entities such as cooperatives, nonprofits, charities, and foundations aimed at social purposes and reinvesting profits for community benefit rather than private gain. Sometimes referred to as the "third sector" (which is sometimes used to designate strictly non-profit or non-governmental organisations), depending on cultural and institutional contexts.

Social innovation
Novel solutions, methods or approaches that address social challenges more effectively, sustainably, or inclusively t han existing alternatives.

Stakeholder
Any individual or group that can affect or be affected by an organisation's activities.

Director of Publication: Cécile Leclair (Avise) – **Coordinator and Editor:** Lydia Fenner (Avise) – **Contributors:** BIRDS members - Avise (France), Forum for Social Innovation (Sweden), Portugal Social Innovation & Cohesion & Development Agency (Portugal), the Directorate-General for Family Diversity and Social Services of the Ministry of Social Rights, Consumer Affairs and the 2030 Agenda (Spain) – **Revision Committee:** Louise de Rochechouart, Fanny Etienne – **Graphic design:** Estelle Gironde – **Publisher:** Avise, 18 avenue Parmentier, 75011 Paris **Printing:** Imprimerie Courand et Associés – **Printed on 100% recycled** – **ISBN:** 979-10-91375-43-6 – **Printing end date:** September 2026 – **www.avise.org**

ABOUT THE AUTHORS

Avise is a non-profit organisation based in Paris since 2002. Its mission is to develop the social solidarity economy and social innovation in France by supporting project leaders and helping to establish an ecosystem favouring their development. It coordinates action programmes covering every stage of a 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.

www.avise.org

BIRDS brings together the National Competence Centres for Social Innovation of France, Portugal, Spain and Sweden, co-funded by the European Union's Social Innovation+ Initiative (2024–2027), to strengthen regional ecosystems, impact assessment, upscaling and funding of social innovation. Partners: Avise (France), Forum for Social Innovation (Sweden), Portugal Social Innovation & Cohesion & Development Agency (Portugal), the Directorate-General for Family Diversity and Social Services of the Ministry of Social Rights, Consumer Affairs and the 2030 Agenda (Spain).

www.avise.org/boosting-initiatives-resources-develop-social-innovation

Co-funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or European Social Fund Agency. Neither the European Union nor the Granting Authority can be held responsible for them.