



SROI Report Checklist

This is for your own use, to check your progress as you work through the guide.

Checklist	Target Date	Completion
Stage 1: Establishing scope and identifying stakeholders		
Provided background information on the organisation?		
Explained why you are carrying out the analysis and for whom, including considering how you will communicate with them?		
Decided if you are analysing part of the organisation or all of it?		
Decided if you are analysing the social return in relation to a specific source of income or for activities funded by several sources?		
Is this an evaluation of the past or a forecast of the future?		
What timescale will the report cover?		
Have resources been identified (e.g., sufficient time, resources, and skills?)		
Has the stakeholder table been completed?		
Considered that some of these changes may happen to stakeholders that are outside your scope and should you revise the scope to include them?		
Stage 2: Mapping outcomes		
Completed the first two columns of the Impact Map?		
Documented your decisions on which stakeholders are material?		
Involved stakeholders in completing the next sections?		
For each stakeholder, have you included their contribution (input) to the activity (there may be some stakeholders that do not make an input)?		
Have the inputs been assigned a value?		
Have you checked to make sure that the inputs you have recorded include whole costs of delivering the service (e.g., overheads, rent)?		
Does the report include a description of the outcomes?		
Does it cover intended and unintended changes?		
Have you included positive and negative changes?		
Do you want to add or remove stakeholders or stakeholder groups?		



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Stage 3: Evidencing outcomes and giving them a value		
Are indicators for the outcomes identified?		
How long do the outcomes last?		
Do you already have information in relation to each indicator?		
If not, do you have a plan for how you will gain this information?		
Have you completed the column for the source of the information?		
Have you completed the column for each indicator?		
For each outcome where you have not recorded one or more indicators, have you included the reason in your report?		
Have you identified a financial proxy and source for each outcome?		
Are there any indicators for which you have not recorded a financial proxy? Have you included these in your report?		
Stage 4: Establishing impact		
Do you have information for deadweight in relation to each outcome?		
Do you think any of your estimates for deadweight can be explained by reference to displacement or attribution?		
If some deadweight can be explained by displacement, have you decided to add a new stakeholder (and/or change the scope)?		
If there is attribution, does this mean that you have missed out contributions made by other stakeholders who should now be added?		
Have you estimated attribution and recorded how you made the estimate?		
If the outcomes last for more than one period, what happens to the outcome over this period (drop-off)?		
Have you calculated impact (indicator multiplied by financial proxy minus percentages for deadweight, displacement, and attribution)?		
Have you calculated any drop-off?		
As a result, are there any changes where the activities in the scope do not contribute to a significant change?		
Have you completed the columns for deadweight, attribution, displacement, and drop-off?		



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Stage 5: Calculating the SROI		
Have you set out the financial values of the indicators for each period		
Have you selected a discount rate?		
Calculated: a) social return ratio, b) net social return ratio, c) payback period?		
Do you have a total value for the inputs?		
Have you checked the sensitivity of your result for amounts of change, financial proxies, and measures of additionality?		
Stage 6: Reporting and embedding		
Have you summarised the changes required to the organisation's systems, governance, or activities to improve ability to account for and manage social value created?		
Have you prepared a plan for these changes?		
Have you planned how to communicate your value in formats that meet your audiences' needs?		
If you have decided to produce a full report, does it include an audit trail of all decision-making, assumptions and sources?		
If you have decided to produce a full report, have you included a qualitative discussion of the assumptions and limitations underlying your analysis?		
Have you reviewed whether your communications created the desired effect in your audiences, and whether they liked the content and format?		
Have you decided on your approach to verification?		