

Transnational Capacity Building workshop 4  
**Boosting Social Impact  
Measurement Capacity  
through digitalisation & data use**  
29 January 2026 – Italy (Online)

**Gabriele Guzzetti**

**Direttore Generale, Triadi**

***Social Impact: Digitalisation and AI  
Integration***





# Triadi

# Triadi - Key areas of activity

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## ADVISORY

- Materiality analysis and strategic positioning
- Theory of Change design and implementation
- Impact assessment, evaluation and monetisation
- Compliance and alignment with international standards and regulations
- Reporting & disclosure

## TRAINING

- Onboarding session for C-level & executives
- Practical workshops on impact evaluation methodologies and tools
- Capacity building programs
- Updating sessions on international standards and regulations

## TECH HUB

- Support in digitalization process and integration of impact methodologies
- Development of tailor-made tools for impact management and evaluation
- Digital platforms and AI-powered solutions for monitoring and reporting

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## OUR CUSTOMERS



Asset Managers and Banks



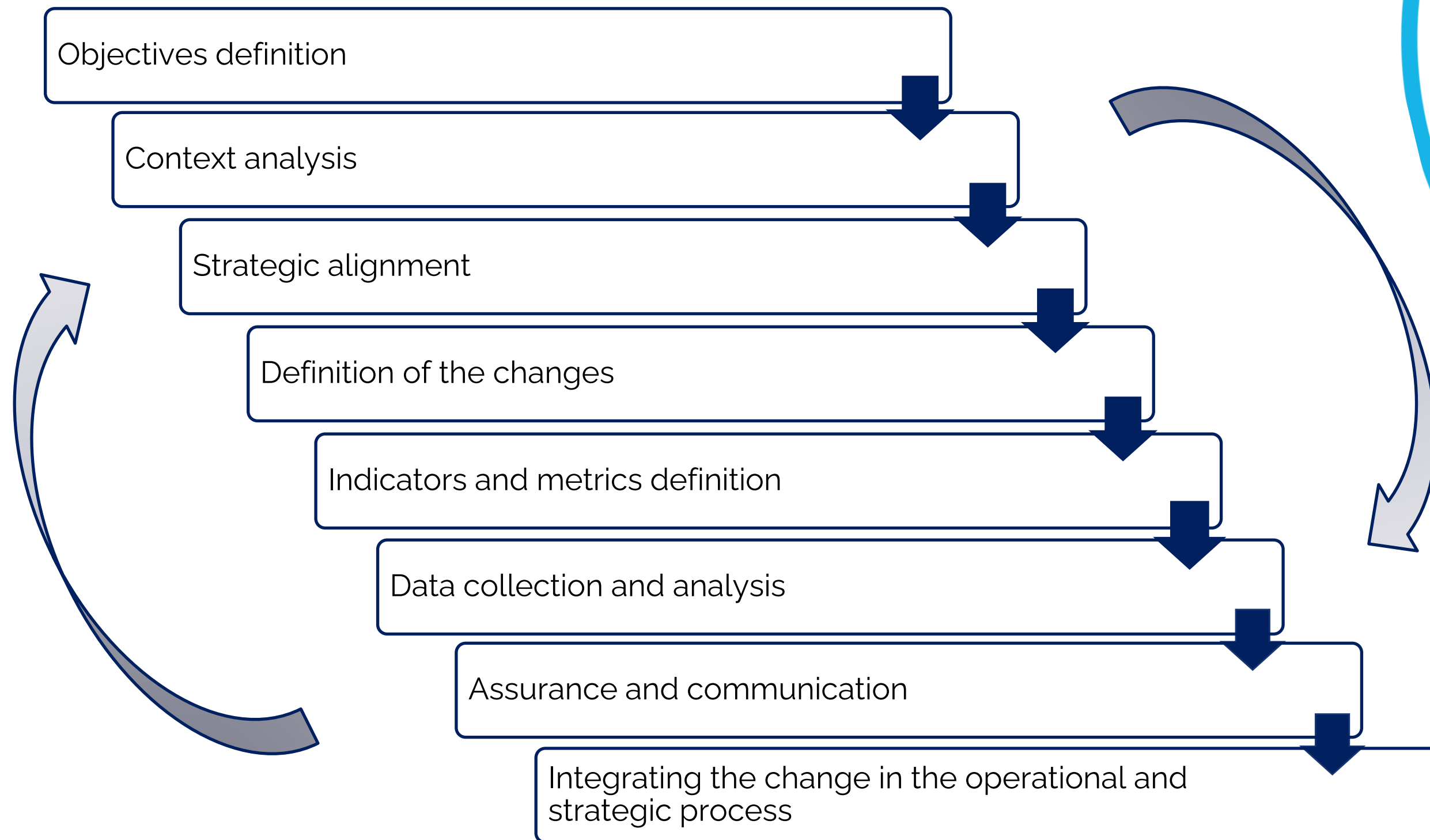
Corporates and SMEs

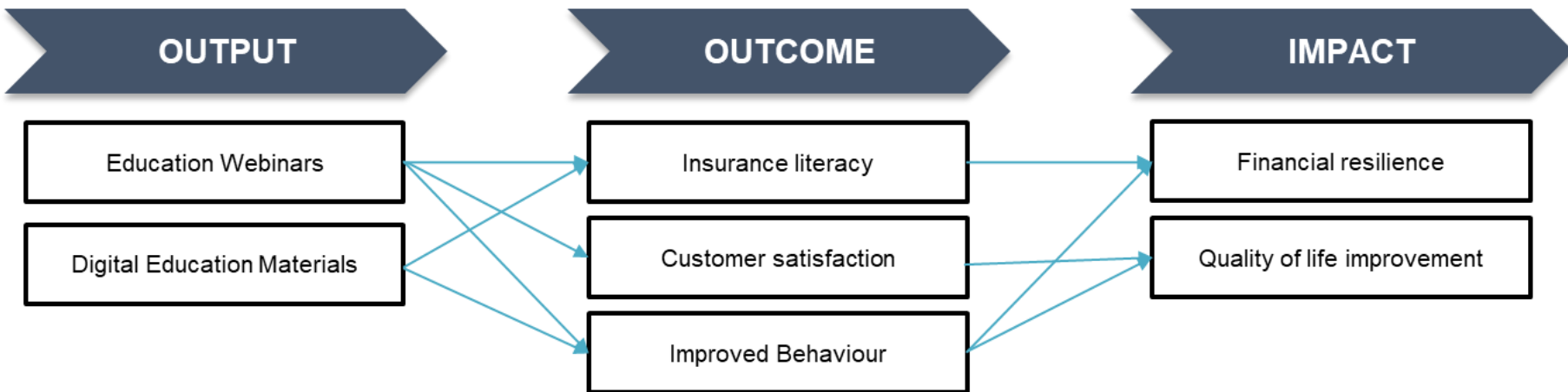
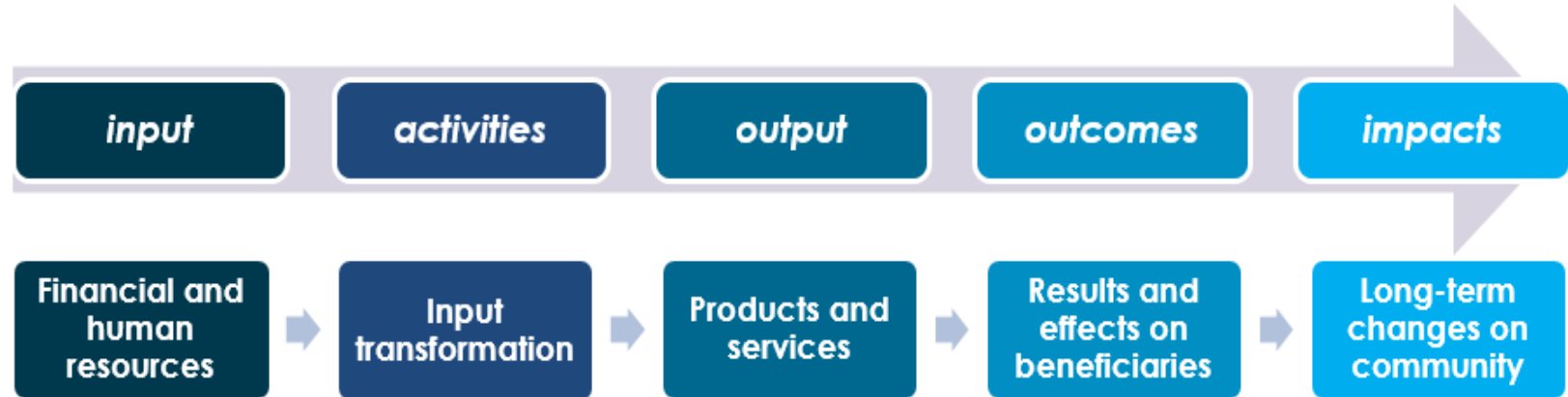
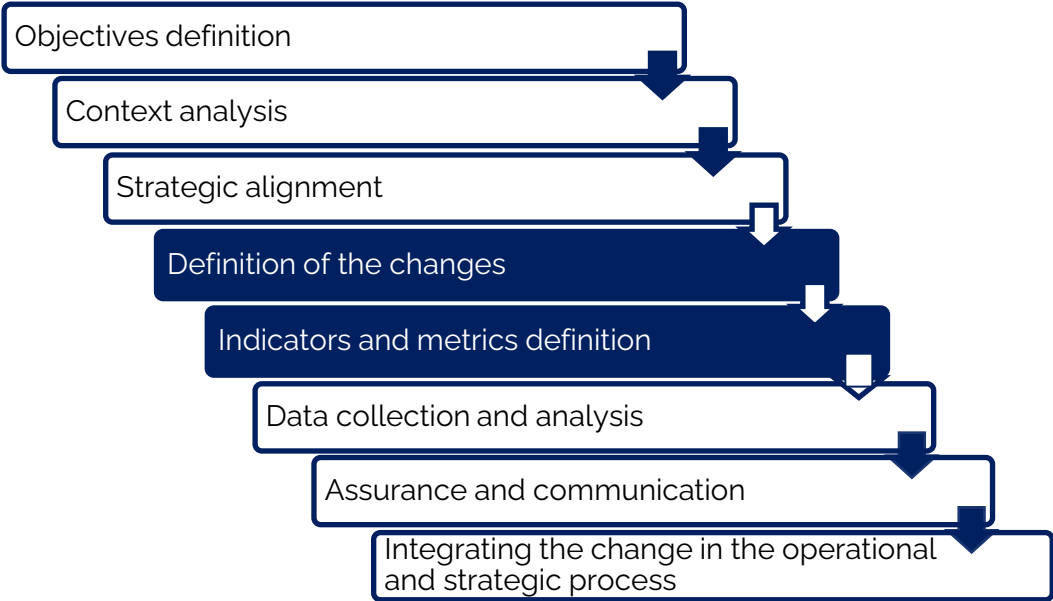


Not for profit, NGOs, Foundations

# The Impact Measurement and Management Process







Output (indicators and metrics)
<b>Number of insurance webinars conducted</b> (Count of workshops held per reporting period)
<b>Hours of insurance education provided</b> (Total hours spent conducting workshops and educational sessions)
<b>Quantity of educational materials distributed</b> (Total number of brochures, guides, and online resources distributed)
<b>Completion of webinar series</b> (Percentage of participants who completed the entire insurance workshop series)

Outcome (indicators and metrics)
<b>Increase in insurance literacy levels</b> (Pre- and post-assessment scores measuring the change in participants' knowledge about insurance concepts)
<b>Changes in insurance behavior</b> (Percentage of participants who report making changes to their insurance coverage or purchasing new policies after the intervention)
<b>Net Promoter Score (NPS) for Educational Initiatives</b> (NPS based on customer responses after intervention)

Impact (indicators and metrics)
<b>Improved community resilience to financial shocks and unexpected events</b> (Percentage change in the reported ability of community members to recover from financial setbacks over time)
<b>Improved overall quality of life within the community</b> (Percentage change of community members of how insurance knowledge has contributed to an improved quality of life over time)



DATA AVAILABILITY



SPREAD  
INFORMATION

QUALITY OF DATA



ACCOUNTABILITY & DATA  
ASSURANCE

COST AND LACK OF  
KNOWLEDGE



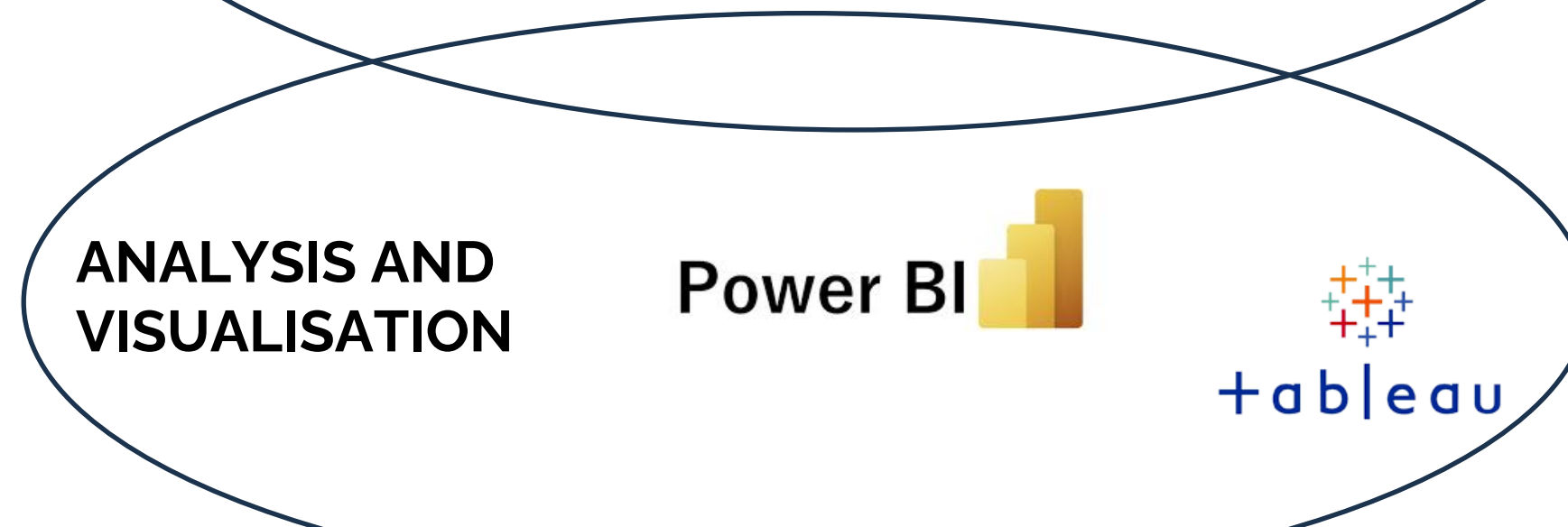
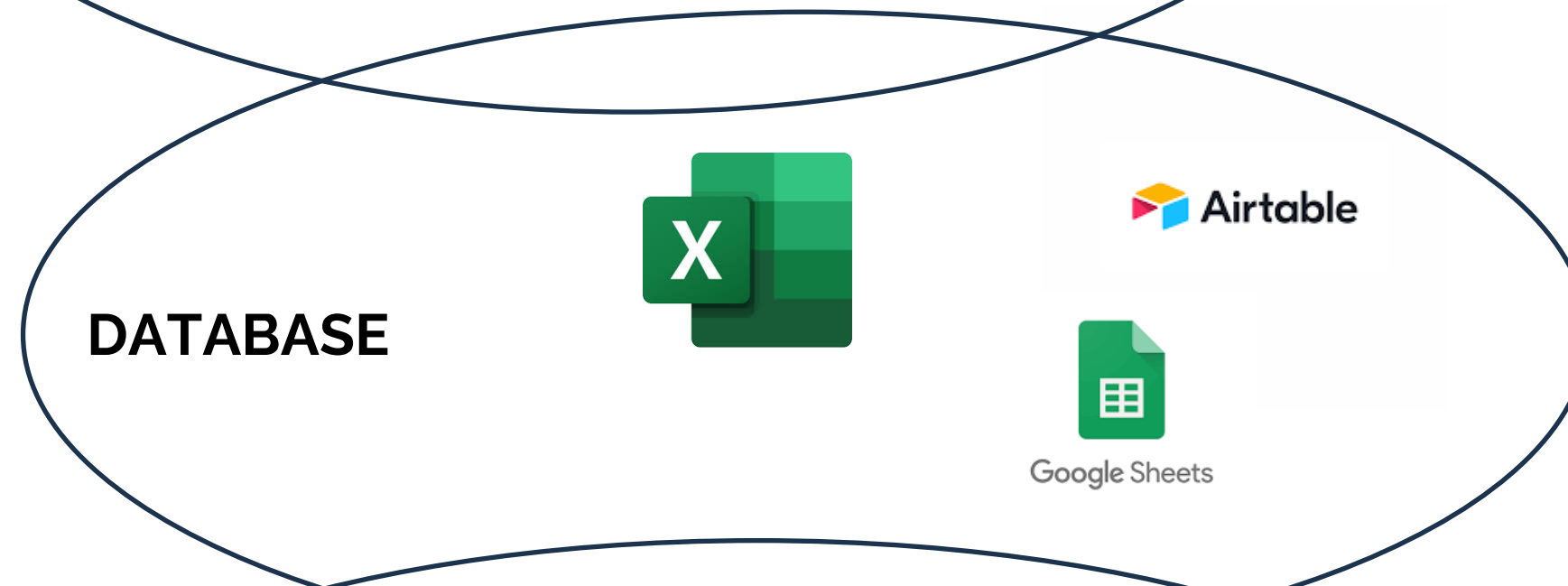
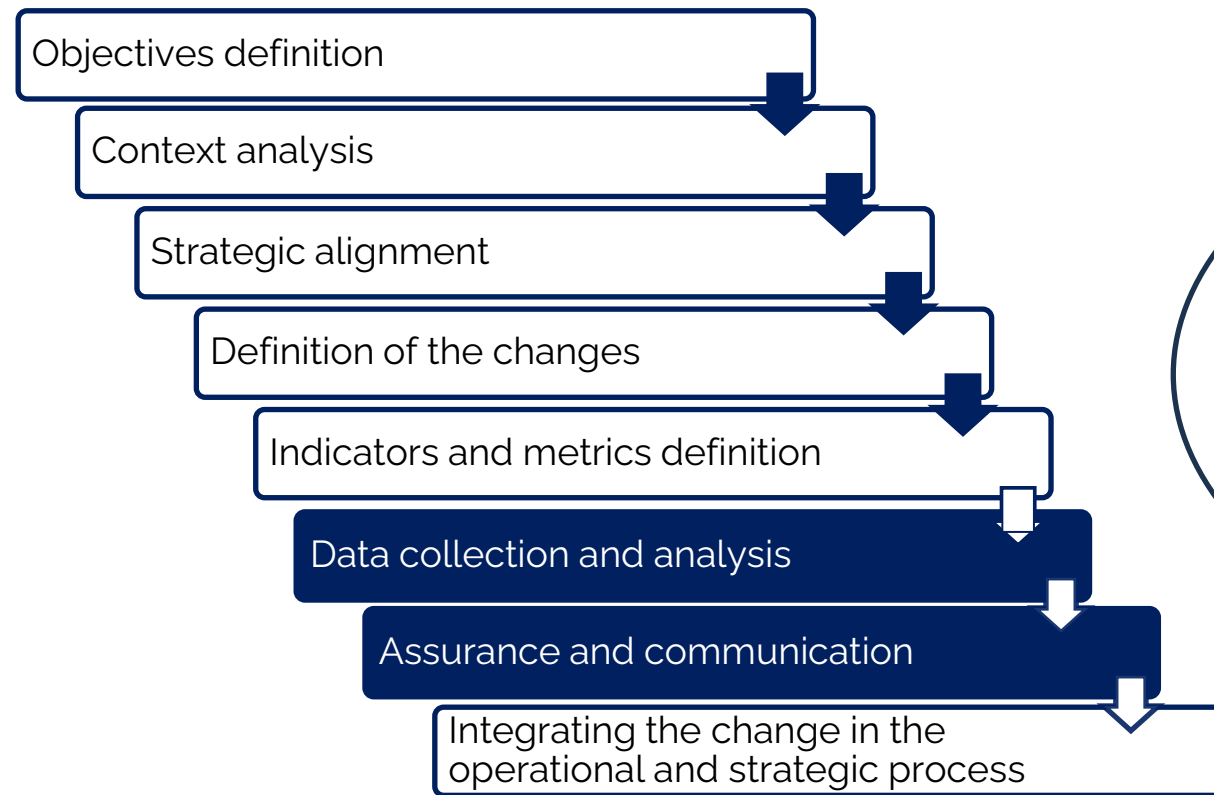
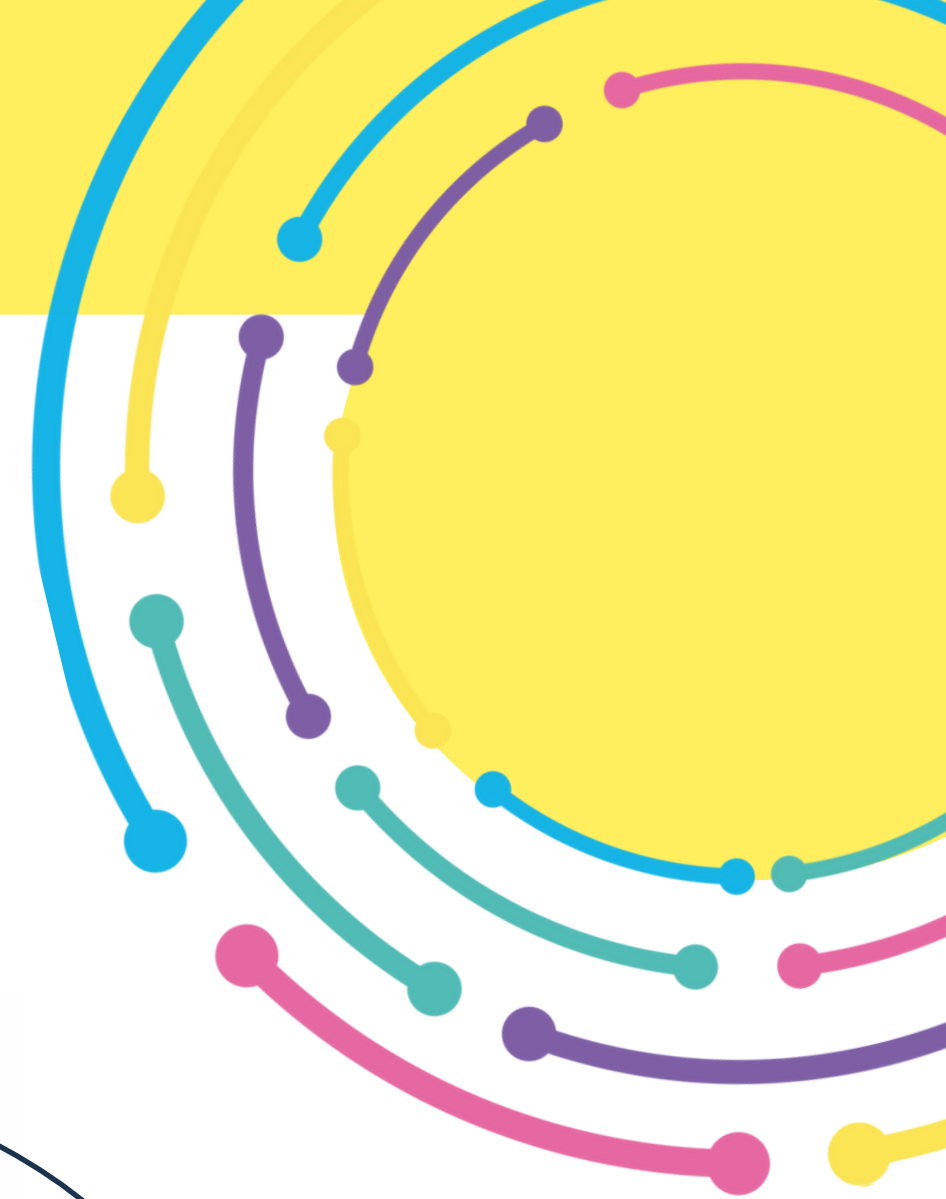
HOW TO REALLY USE DATA AND  
RESULTS



# Instruments for digitalization and automation



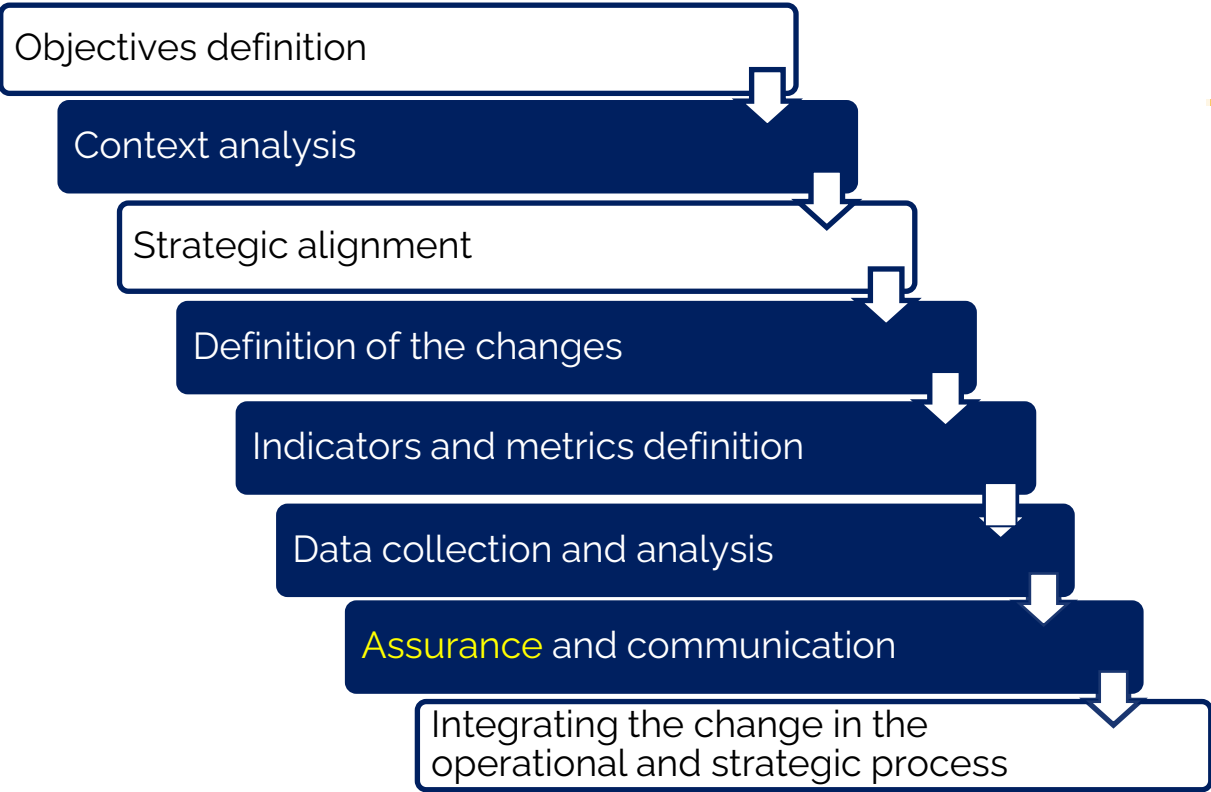
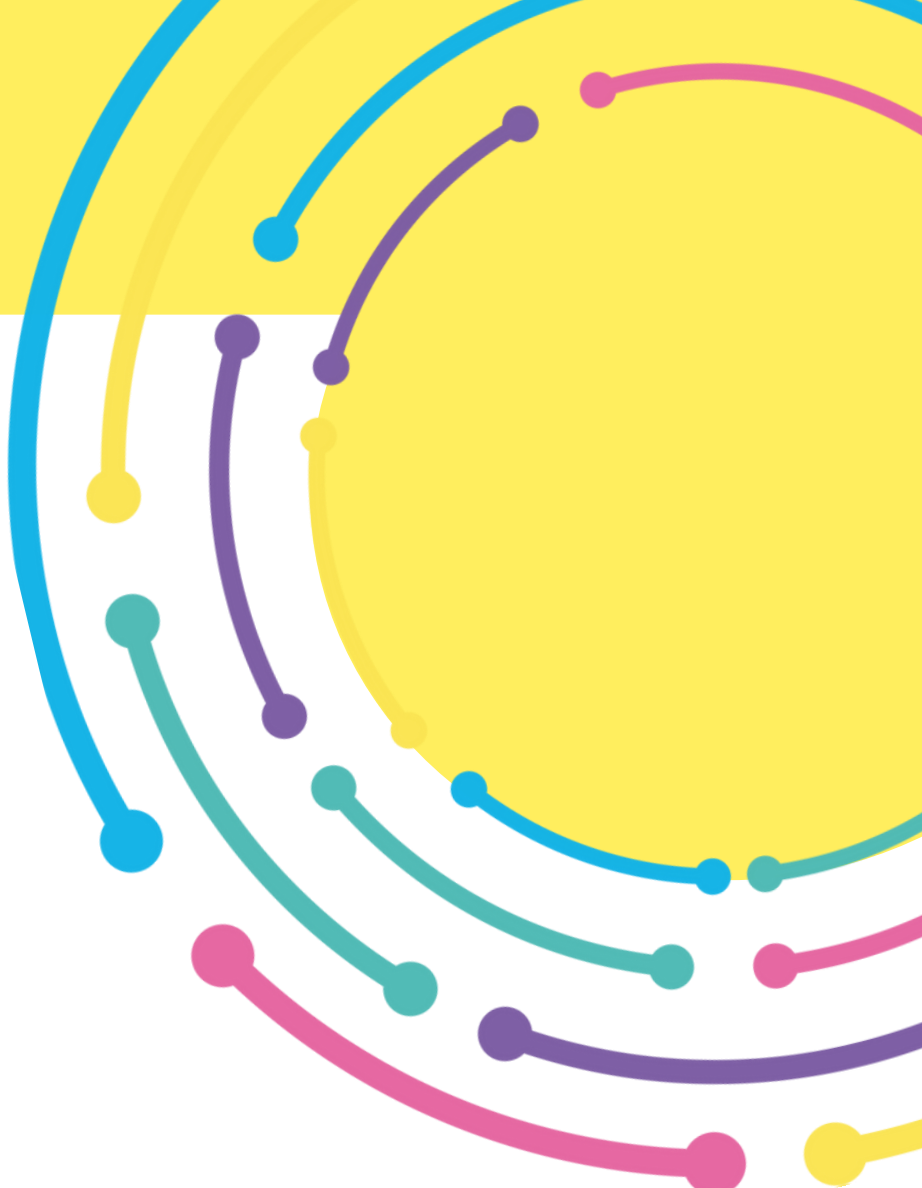




**Cost effective**  
**High Flexibility**  
**Low Barrier to Entry**



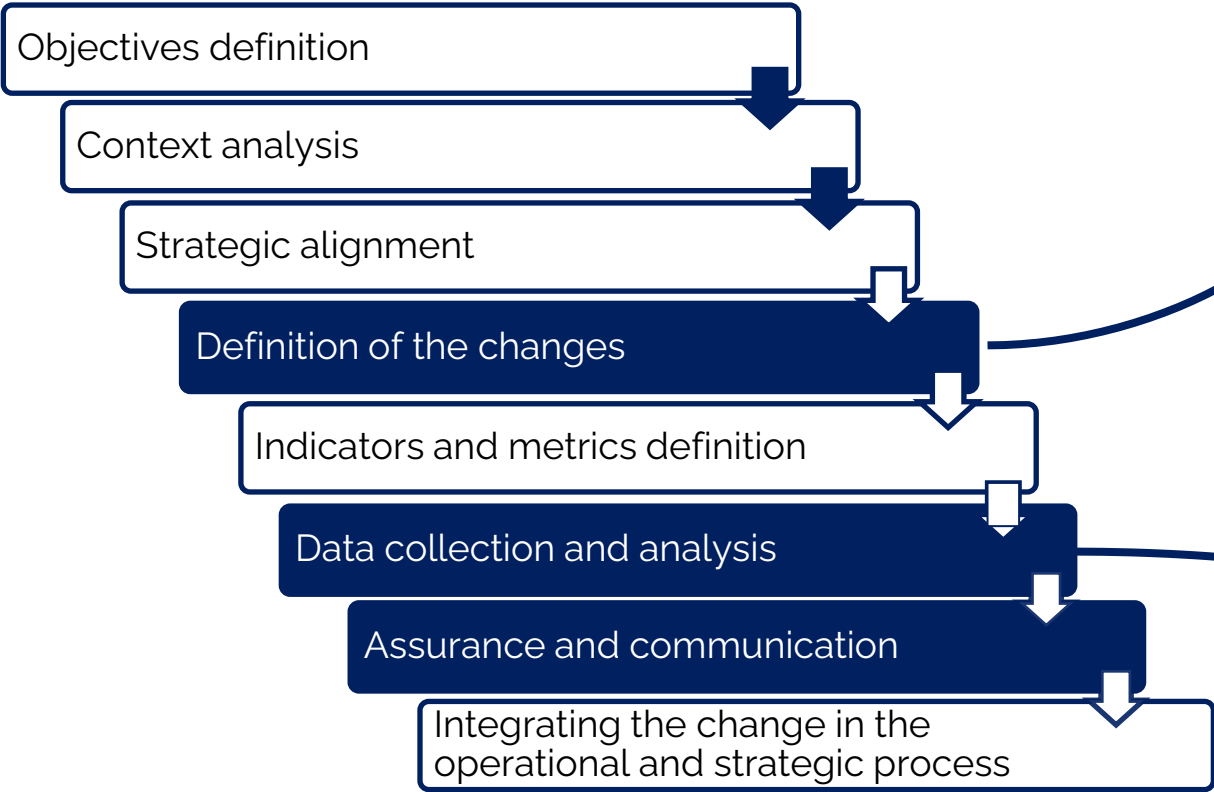
**Data Silos**  
**Manual Error**  
**Limited Qualitative Analysis**



- Speed & Scalability
- Versatility
- Integration with traditional tool



- Hallucinations
- Privacy & Ethics
- AI doesn't «know» your community
- Prompt dependance



Sopact Copilot for Impact and Sustainability



Tools typically designed for general use rather than social impact measurement.

worldfavor

sopact

IMPACT  
MAPPER

Generation  
Impact Global

open-es

IMPACTA  
UpMetrics

CLARITY AI

UPRIGHT PROJECT

Sustainability & ESG Strategic  
Management Platforms

Impact Measurement & Management (IMM)  
Platforms

Net Impact Quantification and  
rating



Data Centralization  
Methodological Robustness  
Automated Reporting



Standardization vs. Flexibility (Customization Costs)  
Process Integration  
Learning curve

# Social Impact: Digitalisation and AI Integration – Case study





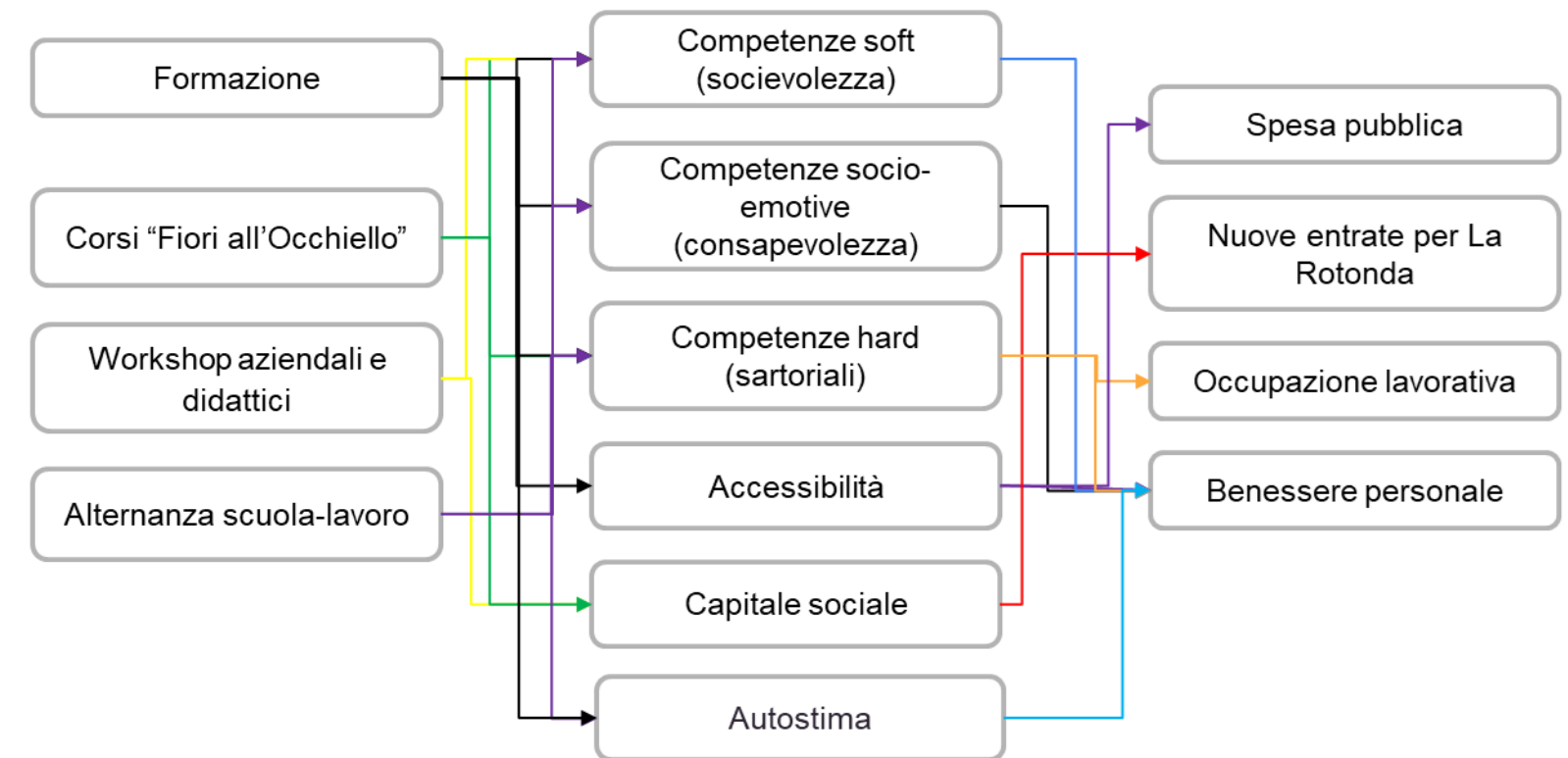
## *From single project measurement to Ad hoc platform for data collection and analysis*

It is always important to start with a **structured mapping** from the activities to the changes you want to generate, divided into different areas of analysis (e.g. sectors in which you operate, types of beneficiaries, etc).

### output

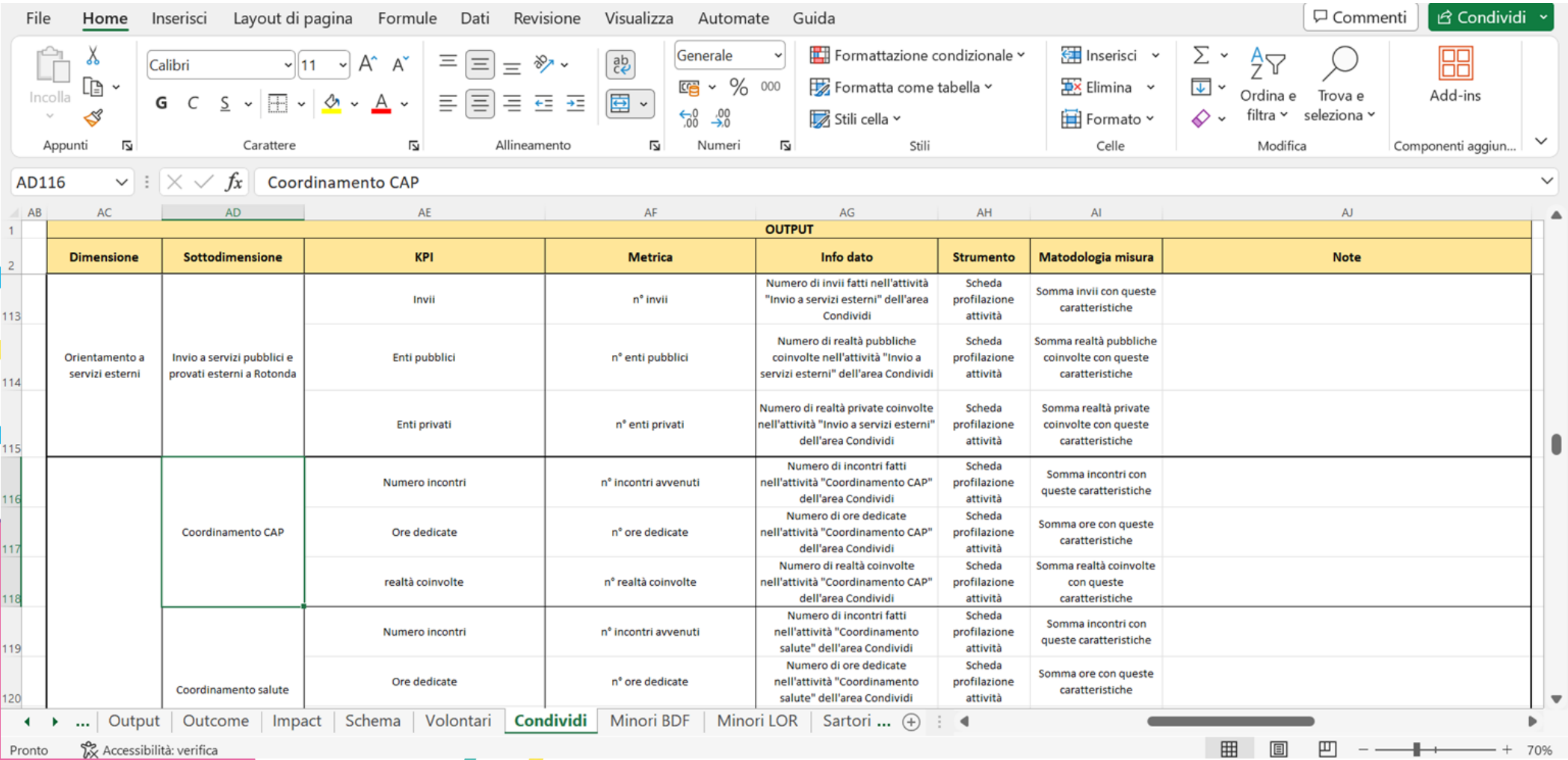
### outcome

### impact





*From single project measurement to Ad hoc platform for data collection and analysis*



Dimensione	Sottodimensione	KPI	Metrica	Info dato	Strumento	Metodologia misura	Note
Orientamento a servizi esterni	Invio a servizi pubblici e provati esterni a Rotonda	Invii	n° invii	Numero di invii fatti nell'attività "Invio a servizi esterni" dell'area Condividi	Scheda profilazione attività	Somma invii con queste caratteristiche	
		Enti pubblici	n° enti pubblici	Numero di realtà pubbliche coinvolte nell'attività "Invio a servizi esterni" dell'area Condividi	Scheda profilazione attività	Somma realtà pubbliche coinvolte con queste caratteristiche	
		Enti privati	n° enti privati	Numero di realtà private coinvolte nell'attività "Invio a servizi esterni" dell'area Condividi	Scheda profilazione attività	Somma realtà private coinvolte con queste caratteristiche	
	Coordinamento CAP	Numero incontri	n° incontri avvenuti	Numero di incontri fatti nell'attività "Coordinamento CAP" dell'area Condividi	Scheda profilazione attività	Somma incontri con queste caratteristiche	
		Ore dedicate	n° ore dedicate	Numero di ore dedicate nell'attività "Coordinamento CAP" dell'area Condividi	Scheda profilazione attività	Somma ore con queste caratteristiche	
		realtà coinvolte	n° realtà coinvolte	Numero di realtà coinvolte nell'attività "Coordinamento CAP" dell'area Condividi	Scheda profilazione attività	Somma realtà coinvolte con queste caratteristiche	
	Coordinamento salute	Numero incontri	n° incontri avvenuti	Numero di incontri fatti nell'attività "Coordinamento salute" dell'area Condividi	Scheda profilazione attività	Somma incontri con queste caratteristiche	
		Ore dedicate	n° ore dedicate	Numero di ore dedicate nell'attività "Coordinamento salute" dell'area Condividi	Scheda profilazione attività	Somma ore con queste caratteristiche	

**Structuring a solid framework that can support digitisation:**

- Definition of indicators
- Metrics for calculation
- Data collection logic: desk analysis, surveys, etc.
- Data collection tools (e.g. surveys questions)
- Systematisation of collection tools for different beneficiaries

## *From single project measurement to Ad hoc platform for data collection and analysis*



**The final tool must meet the needs of the organisation:**

- Each beneficiary must only answer questions evaluating the activities in which they participated and the outcomes/impacts associated with them.
- Each operator must answer questions relating to the beneficiaries they have followed.
- The system must allow data to be viewed by area, with a focus on internal efficiency.
- With a focus on strategic decisions and communication, the system must allow aggregate data to be viewed according to the impact of the entire organisation.
- Ensure intuitive and usable graphics to support internal decisions and external communication.

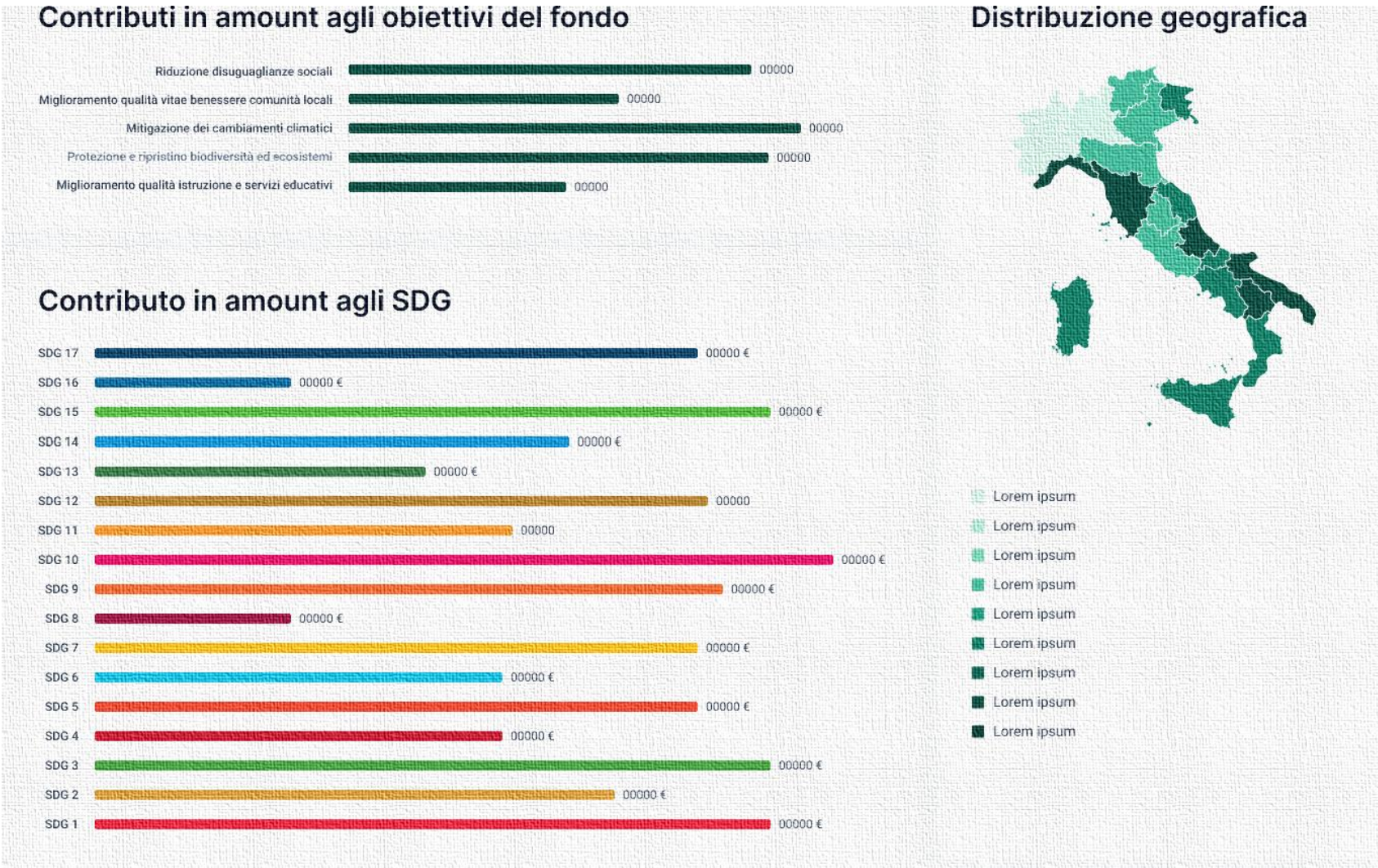


Hub for the Investor

The platform supports the management of the impact generated by investments by understanding their contribution to SDGs and the investor's objectives

Human led-approach

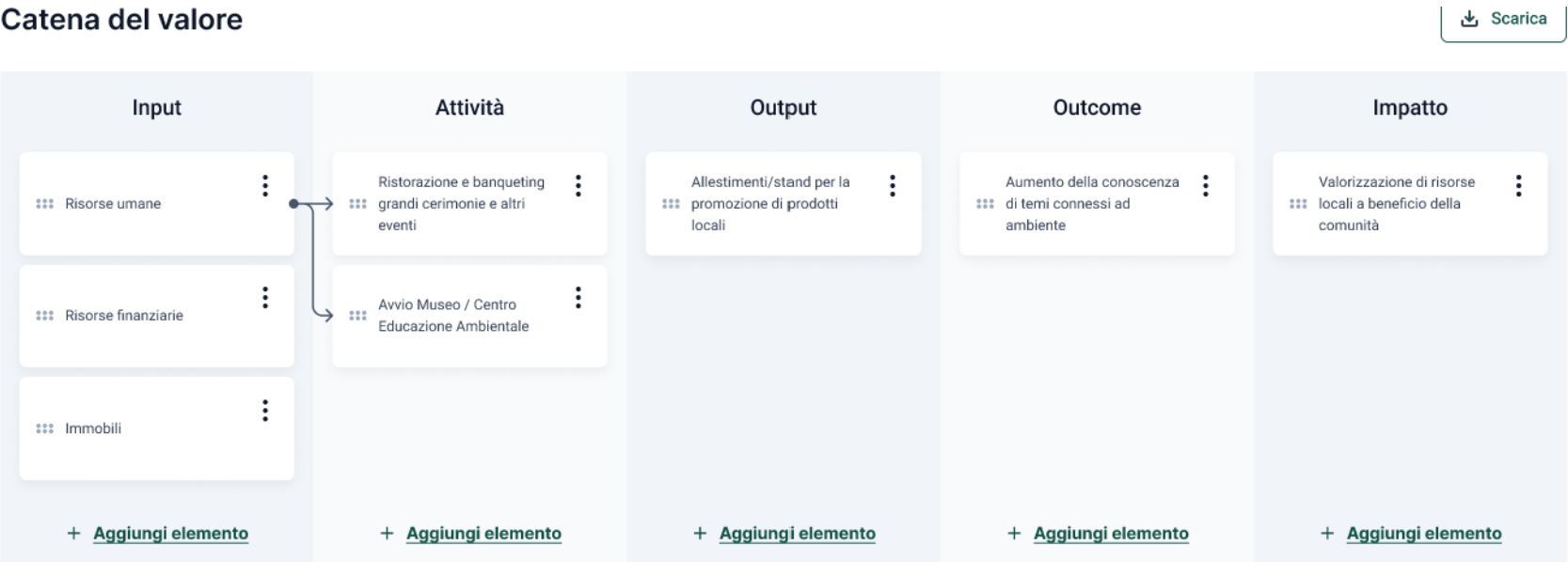
The entire framework is built on a traditional, human-led approach. Every logic link and metric selection is validated manually by impact experts.





Enabling Collaboration

The platform enables the collaboration with the investee in stakeholder analysis, the definition of the impact value chain



KPI and Target Monitoring

The platform enables the joint identification and tracking of KPIs, ensuring all parties are aligned on performance expectations.

Assurance and Accountability

Every KPI reported can be linked back to specific evidence, ensuring the data is verifiable and traceable

KPIcatena del valore				Aggiungi target
KPI outcome	Metrica/formula di calcolo KPI		Baseline	
N° di persone escluse o a rischio di esclusione sociale che migliorano le loro condizioni materiali di vita	N° mesi	Σ tempi/ beneficiari	Lorem ipsum dolor sit amet consectetur. Adipiscing dis at ipsum morbi eu pulvinar mollis tempor purus.	3
N° di persone escluse o a rischio di esclusione sociale che migliorano le loro condizioni materiali di vita	N° mesi	Σ tempi/ beneficiari	Lorem ipsum dolor sit amet consectetur. Adipiscing dis at ipsum morbi eu pulvinar mollis tempor purus.	3
KPI output	Metrica/formula di calcolo KPI		Baseline	
N° di persone escluse o a rischio di esclusione sociale che migliorano le loro condizioni materiali di vita	N° mesi	Σ tempi/ beneficiari	Lorem ipsum dolor sit amet consectetur. Adipiscing dis at ipsum morbi eu pulvinar mollis tempor purus.	3
N° di persone escluse o a rischio di esclusione sociale che migliorano le loro condizioni materiali di vita	N° mesi	Σ tempi/ beneficiari	Lorem ipsum dolor sit amet consectetur. Adipiscing dis at ipsum morbi eu pulvinar mollis tempor purus.	3



## Automated Speech-to-Text (Transcoding):

Utilizing AI engines to instantly convert hundreds of hours of video/audio into searchable text, saving months of manual transcription

## AI-Powered Theme Identification

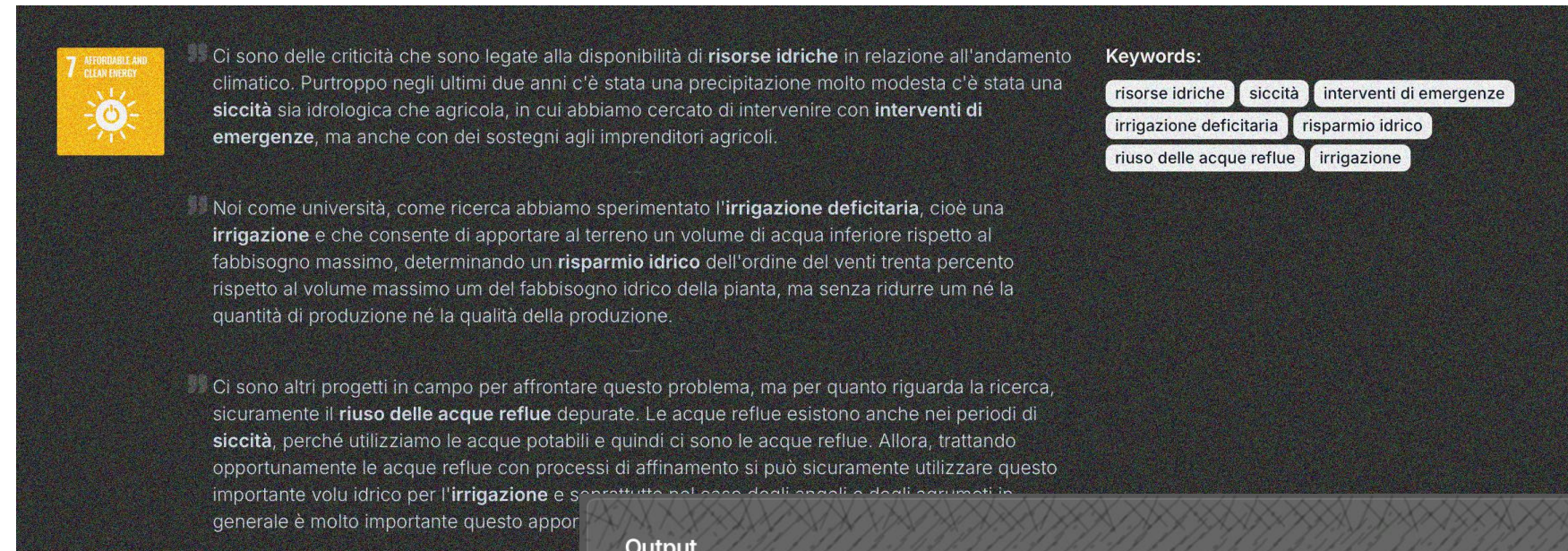
Identification of themes related to sustainable development challenges using machine learning tools

## Sentiment & Emotion Analysis

AI-powered Natural Language Processing (NLP) scans the transcripts to detect emotional tones (e.g., confidence, frustration, gratitude) and quantify qualitative "vibes."

## Automated analysis and visualisation

Automated calculation of syntethic impact indicators [non-monetary]  
Visual representation through dashboards



**7 AFFORDABLE AND CLEAN ENERGY**

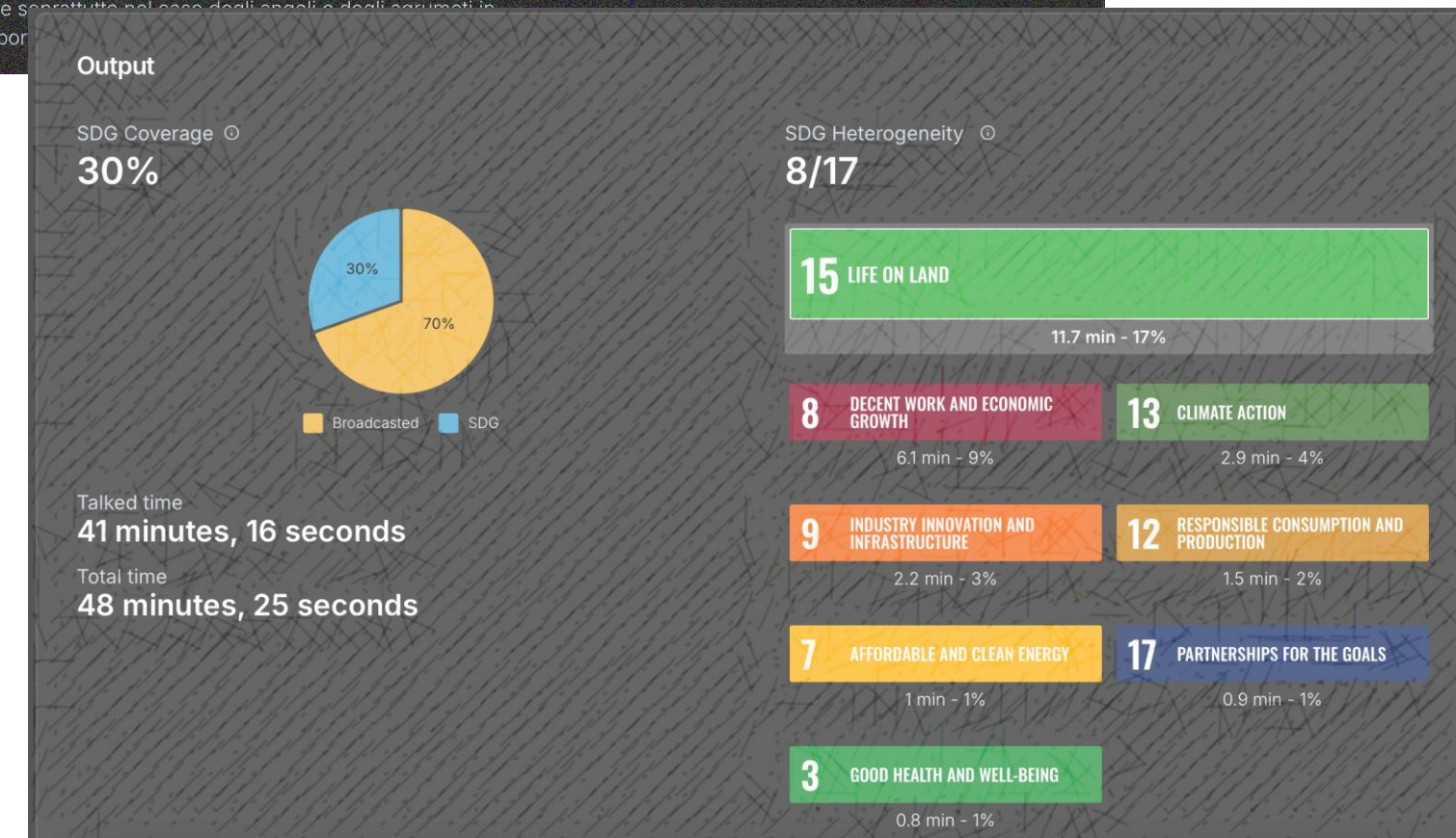
Ci sono delle criticità che sono legate alla disponibilità di **risorse idriche** in relazione all'andamento climatico. Purtroppo negli ultimi due anni c'è stata una precipitazione molto modesta c'è stata una **siccità** sia idrologica che agricola, in cui abbiamo cercato di intervenire con **interventi di emergenze**, ma anche con dei sostegni agli imprenditori agricoli.

Noi come università, come ricerca abbiamo sperimentato l'**irrigazione deficitaria**, cioè una **irrigazione** e che consente di apportare al terreno un volume di acqua inferiore rispetto al fabbisogno massimo, determinando un **risparmio idrico** dell'ordine del venti trenta per cento rispetto al volume massimo um del fabbisogno idrico della pianta, ma senza ridurre um né la quantità di produzione né la qualità della produzione.

Ci sono altri progetti in campo per affrontare questo problema, ma per quanto riguarda la ricerca, sicuramente il **riuso delle acque reflue** depurate. Le acque reflue esistono anche nei periodi di **siccità**, perché utilizziamo le acque potabili e quindi ci sono le acque reflue. Allora, trattando opportunamente le acque reflue con processi di affinamento si può sicuramente utilizzare questo importante volu idrico per l'**irrigazione** e soprattutto nel caso degli angeli e degli agrumati in generale è molto importante questo apor

**Keywords:**

- risorse idriche
- siccità
- interventi di emergenze
- irrigazione deficitaria
- risparmio idrico
- riuso delle acque reflue
- irrigazione



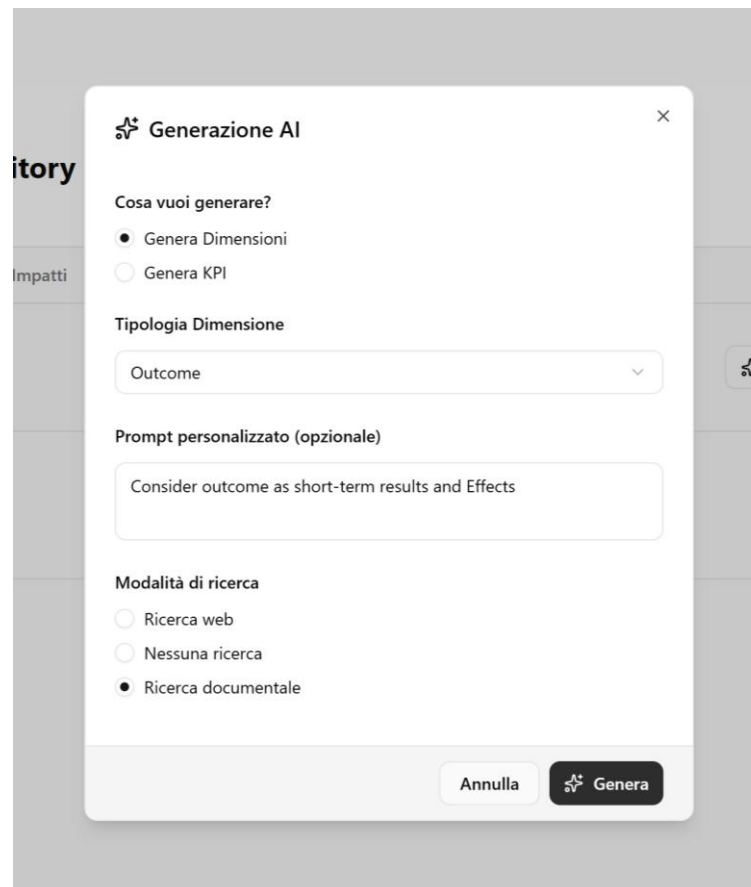


## EXAMPLE: Restarting from the Territory. Integrated Pathways to Prevent Early School Leaving and Address NEET Conditions in the Naples North Metropolitan Area

This one-year project addresses early school leaving and NEET conditions in Naples North through integrated educational support, guidance, and territorial coordination. It combines individual case management and ecosystem-level action to generate measurable and evaluable social impact.

### INPUT

- ❖ Project description documents
- ❖ Project logical framework
- ❖ Transcripts of in-depth calls with the client

**Generazione AI**

Cosa vuoi generare?

- ☒ Genera Dimensioni
- ☐ Genera KPI

Tipologia Dimensione

Outcome

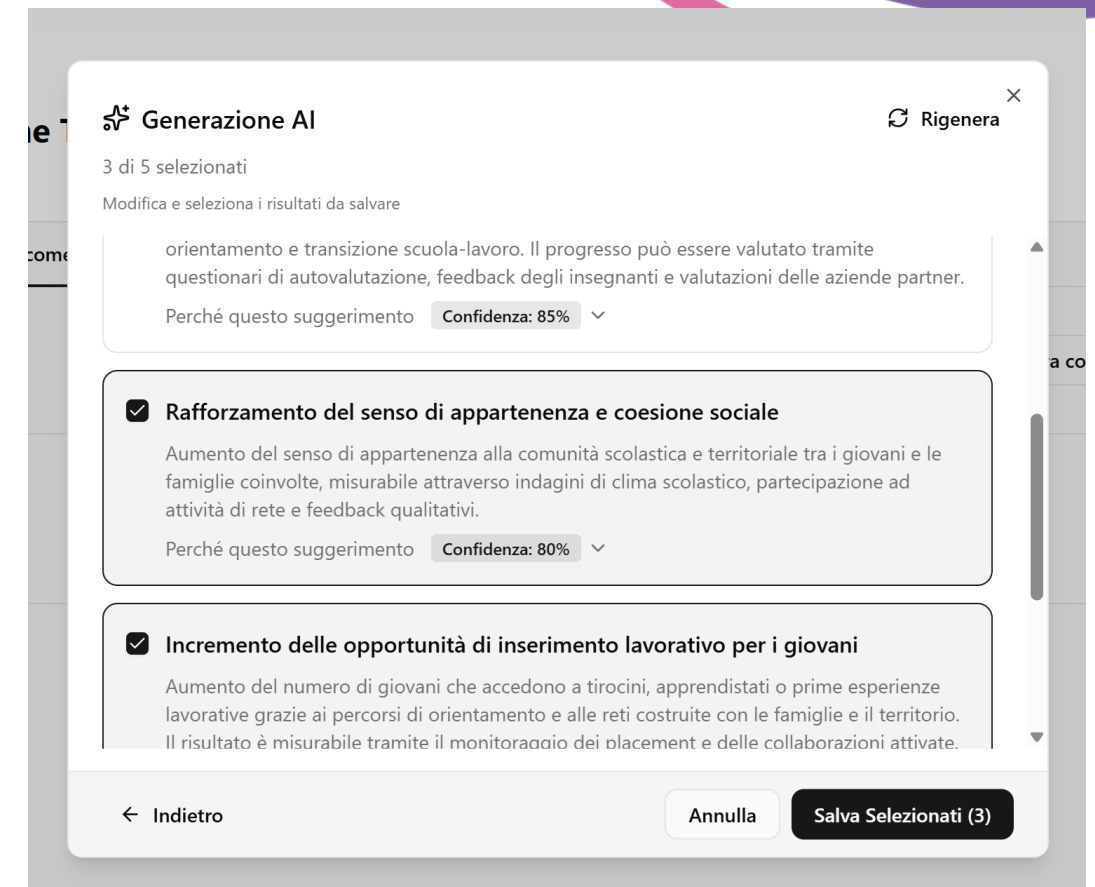
Prompt personalizzato (opzionale)

Consider outcome as short-term results and Effects

Modalità di ricerca

- ☐ Ricerca web
- ☐ Nessuna ricerca
- ☒ Ricerca documentale

Annulla Genera

**Generazione AI**

3 di 5 selezionati

Modifica e seleziona i risultati da salvare

orientamento e transizione scuola-lavoro. Il progresso può essere valutato tramite questionari di autovalutazione, feedback degli insegnanti e valutazioni delle aziende partner.

Perché questo suggerimento **Confidenza: 85%**

☒ **Rafforzamento del senso di appartenenza e coesione sociale**

Aumento del senso di appartenenza alla comunità scolastica e territoriale tra i giovani e le famiglie coinvolte, misurabile attraverso indagini di clima scolastico, partecipazione ad attività di rete e feedback qualitativi.

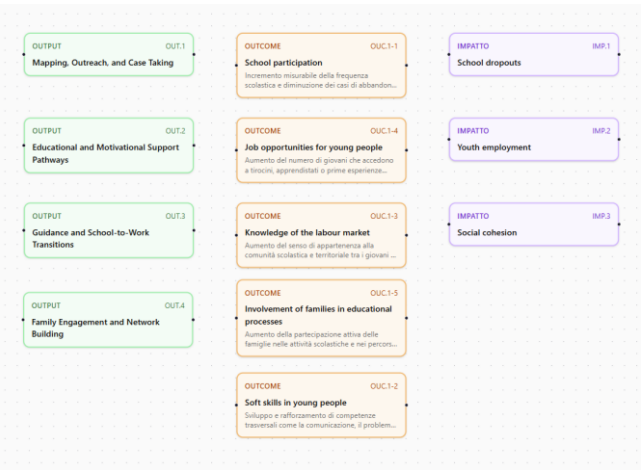
Perché questo suggerimento **Confidenza: 80%**

☒ **Incremento delle opportunità di inserimento lavorativo per i giovani**


Aumento del numero di giovani che accedono a tirocini, apprendistati o prime esperienze lavorative grazie ai percorsi di orientamento e alle reti costruite con le famiglie e il territorio. Il risultato è misurabile tramite il monitoraggio dei placement e delle collaborazioni attivate.

← Indietro Annulla Salva Selezionati (3)



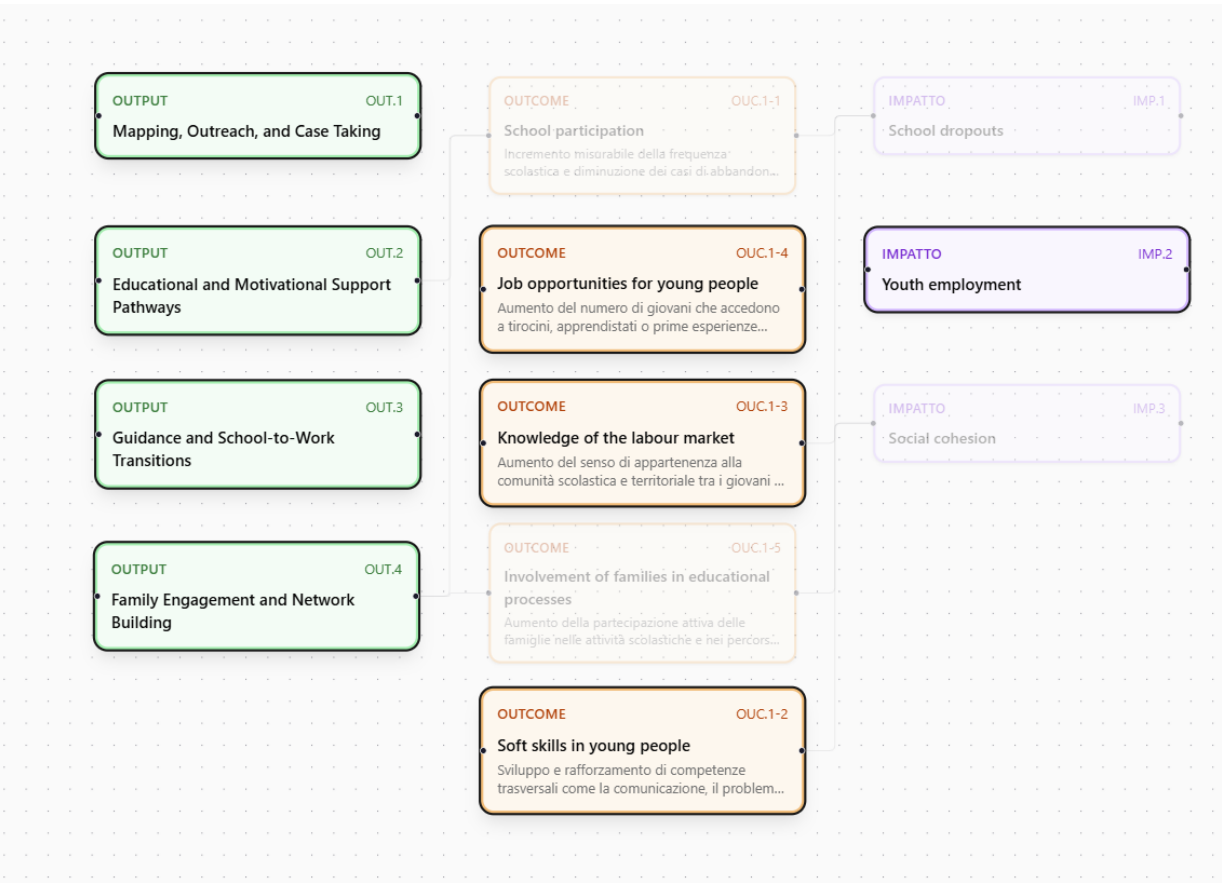


VALUE CHAIN DEFINITION:  
Generation of dimensions  
and creation of causal links  
between them



**HUMAN IN THE LOOP**

Generation of KPIs  
for each dimension



Generazione AI

Cosa vuoi generare?

☐ Genera Dimensioni

☒ Genera KPI

Dimensione di Riferimento

Cerca dimensione...

Cerca dimensione...

Output

Family Engagement and Network Building

Guidance and School-to-Work Transitions

Educational and Motivational Support Pathways

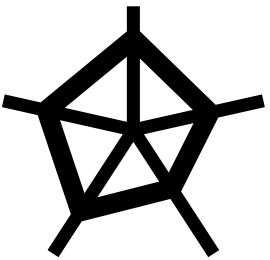
Mapping, Outreach, and Case Taking

Outcome

School participation

Incremento misurabile della frequenza scolastica e diminuzione dei casi di abbandono tra i giovani coinvolti nei percorsi di supporto educativo e...

MONITORING





European Social Fund+ (ESF)  
Employment and Social Innovation (EaSI)  
strand

## A new standard for impact intelligence.

ADALTIM builds the infrastructure for transparent, reliable and comparable impact ratings, delivered through a mission-driven organisation. By combining cutting-edge AI-powered data systems with deep impact measurement expertise, ADALTIM places true societal value at the heart of impact-driven decisions.

### Our Added Value

#### ➤ Methodological Innovation

Shifting the focus from scoring compliance (ESG rating model) to outcome-level results, where long-term change truly resides, along the Theory of Change (Impact rating).

#### ➤ Data- and technology-intensive tools.

Enabling benchmarking and comparability of investees' social impact through an AI-powered platform combining impact metrics with area- and sector-specific impact datasets.

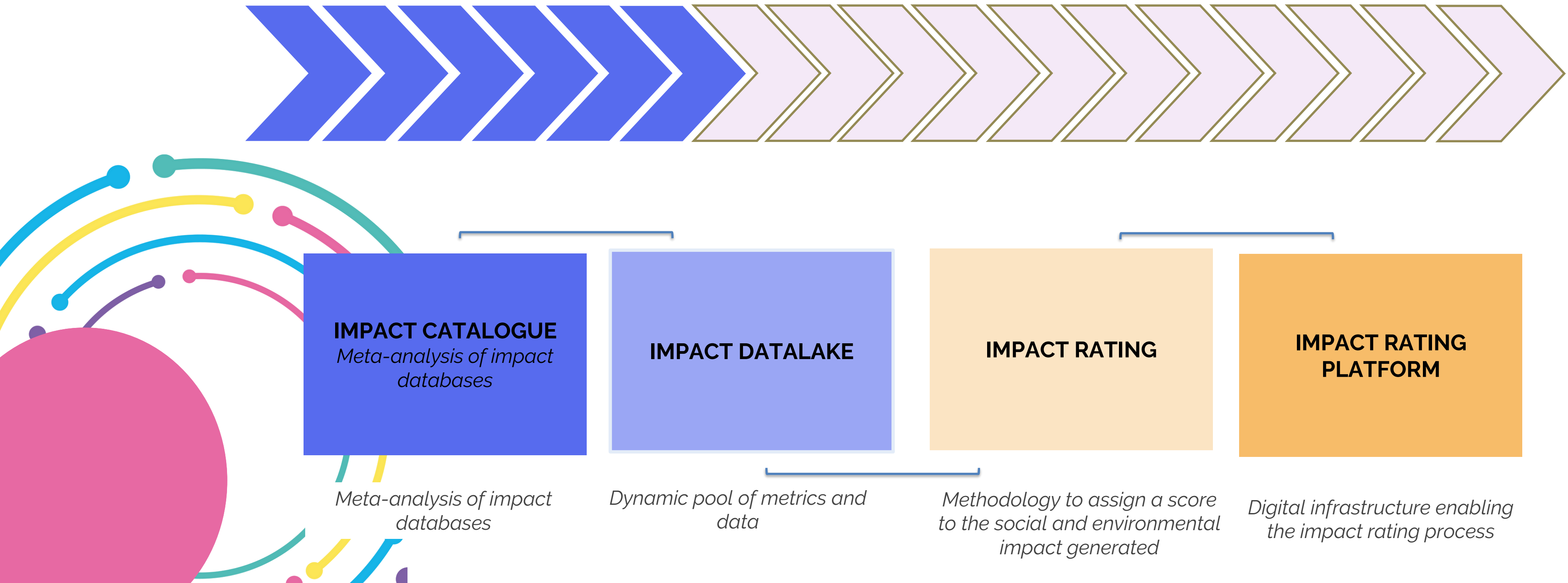
#### ➤ Lasting results

Establishing an independent, market-based organisation to deliver the rating services beyond the project's lifetime.

#### ➤ A radical approach to impact

Accountability, transparency and trust embedded in every step of the impact rating process.

# Pathway to the Impact Rating Platform



# Thank you!

## Contacts:

**Gabriele Guzzetti | Managing Director**

**[Gabriele.guzzetti@triadi.it](mailto:Gabriele.guzzetti@triadi.it)**

**[contatti@triadi.it](mailto:contatti@triadi.it)**

**doimpact.eu**