

## 2-Day SROI Accreditation Training in Hong Kong (in-person)

**Two Sessions:** (#1) March 21-22 [Thu & Fri] & (#2) March 25-26 [Mon & Tue]  
[daily 9:30am to 5:00pm ] [quota: 18 intakes per session]

**Lead Trainer:** Terence YUEN, Executive Director, Social Value Hong Kong  
(Social Value AP3 Advanced Practitioner & Accredited SROI Trainer)

**Co-Trainers:** Tom CHAN, Social Value AP3 Advanced Practitioner (session #1)  
Winnie NG, Senior Consultant, Climate Finance Asia (session #2)

**Fee:** HKD8,000 per participant (covering one-year SVI/SVHK membership fee)  
HKD7,500 per participant (for existing SVHK members)

**Medium of Instruction:** Cantonese (teaching materials in English)

**Venue:** ESG Innovation Lab, 28/F, 28 Stanley Street, Central

Highly interactive, this is the flagship training program accredited by Social Value International that provides learners with the necessary knowledge and skills to be able to conduct a social value or SROI assessment to maximise the impacts of your work. The program has been delivered all around the world for over 10 years by highly experienced Accredited Trainers from Social Value International.

The program meets the requirements for assurance – meaning that your work meets best global standards and by working closely with our trainers, you will be guided using case studies and practical activities so you can effectively measure and manage the impacts of your work.

Social Return on Investment (SROI) is an approach to understanding and managing the impacts of a project, organisation or policy. It is based on stakeholders and uses financial value of the important impacts identified by stakeholders to identify what is important to them.

It is a framework to structure thinking and understanding. It's a story not a number. The story should show how you understand the value created, manage it and can prove it.

The benefits of SROI include:

- A consistent and clear approach to understanding and reporting on the changes caused by an organisation; resulting in:
- Better organisations, with better strategies, systems and accountability; and
- Organisations that are more able to manage risks, identify opportunities and raise finance required to achieve their mission or strategy.

The Social Value and SROI accreditation program provides training to a level suitable for trainees seeking to become accredited practitioners – a prerequisite for attaining the status of AP2 accredited practitioner and AP3 advanced practitioner.

### **Advancing the SVI Practitioner Professional Pathway – AP1 / AP2 / AP3**

<https://www.socialvalueint.org/professional-pathway>

To become an accredited Social Value and SROI practitioner, accredited by Social Value International, a candidate needs to fulfill the following requirements:

#### **Level 1 Social Value Associate (AP1)**

- Become a member of Social Value International
- Successful completion of online Social Value and Impact Management Exam
- Signed copy of Social Value Commitment to Good Practice

#### **Level 2 Accredited Practitioner (AP2) and Level 3 Advanced Practitioner (AP3)**

- Attained the AP1 qualification
- Completed the Social Value and SROI accreditation training program
- Successful assurance of a Social Impact or SROI analysis (mentoring and peer support are permissible in application for AP2 status)
- Successful assurance of a Social Impact or SROI analysis (mentoring and peer support are not allowed in application for AP3 status)
- Successful completion of an interview conducted by SVI

This course is designed as the first step for individuals considering doing an SROI. No prior experience is required. While completion of the training program does not guarantee accreditation, it is a necessary step towards becoming an accredited practitioner.

#### **Registration and Payment Methods:**

Online form: <https://forms.gle/pTbkQzrBWdPW52gu5>

#### **For Further Enquiry:**

Contact us at [hkisia@socialvaluehk.org](mailto:hkisia@socialvaluehk.org)

Supported by:



## Two-Day Social Value and SROI Accreditation Training (in-person)

### Module Contents:

	Module	Module Content
Day 1	Module 1: Scope and Purpose of Impact Management	1.1 Purpose and process 1.2 Principles of Social Value 1.3 Verification and standards
	Module 2: Identifying Stakeholders and Outcomes	2.1 Stakeholders, inputs and outputs 2.2 Understand outcomes 2.3 Well-defined outcomes
Day 2	Module 3: Measuring the Amounts of Changes	3.1 Quantity (Indicators) 3.2 Duration
	Modules 4 & 5: Valuing Changes to Outcomes / From Outcomes to Impact	4.1 Value 4.2 Monetary valuation 5.1 Causality
	Module 6: Calculations, Aggregation, Reporting and Embedding	6.1 Most important outcomes 6.2 Reporting, verification & embedding

**DAY 1** is a practical, step-by-step introduction to the SROI process. We'll begin with some theory but the process is best learnt by trying it, so trainees will learn how to develop a value map – the heart of the SROI process – and explore the processes using an example appropriate to each trainee.

**DAY 2** covers, through group exercises and discussion, issues that practitioners will need to demonstrate an understanding of if they wish to become accredited. Although designed with the assurance process in mind, this course is suitable for anyone wanting more than just an introduction to SROI. Contending issues will be discussed, best practice and techniques shared and examples explored.

Training does not guarantee accreditation, but is a necessary step towards becoming an accredited practitioner. To become a SROI practitioner, accredited by Social Value International, you need to have:

- Completed this training
- Completed a SROI analysis; and
- Become a member of Social Value International

Please note additional fees are required for taking the online Social Value and Impact Management Exam (for attaining AP1 status) and for applying the SROI report assurance service (for attaining AP2 or AP3 status).

### Registration and Payment Methods:

Online registration: <https://forms.gle/pTbkQzrBWdPW52gu5>

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**Payment Methods:**

1. *Direct Transfer*

Please arrange fund transfer to HSBC account 658-104211-001 (Social Value Hong Kong Limited) and **send the image of your fund transfer advice by email to [hkisia@socialvaluehk.org](mailto:hkisia@socialvaluehk.org)**

2. *Cheque*

Send a crossed cheque payable to “**Social Value Hong Kong Limited**” to:

1/F, 6 Hing Wan Street, Wan Chai, Hong Kong (attention: Dr. Terence Yuen, Executive Director)  
(ref: 2024 SROI Training)

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Information to be provided by each trainee: (or use [online form](#))

Name of Trainee: \_\_\_\_\_ (email: \_\_\_\_\_)

Organization: \_\_\_\_\_

Position: \_\_\_\_\_

**Your Preference on Available Training Session:**

- Session #1 March 21<sup>st</sup>-22<sup>nd</sup> (Thursday and Friday)
- Session #2 March 25<sup>th</sup>-26<sup>th</sup> (Monday and Tuesday)\*
- Either session is good

\* Session #2 delivery is subject to demand

**Notes:**

- 1) Please provide all available time slots as we would like to assemble a good mix of participants for both workshops; we’ll confirm with you the assigned training session asap.
- 2) Your registration is **not** confirmed until you received a confirmation email from us. We need to verify your payment and make sure the training sessions are not over-subscribed.
- 3) Please provide information for each participant.

For enquiry, please contact us at [hkisia@socialvaluehk.org](mailto:hkisia@socialvaluehk.org) or 9636-1324 (Mr. Yuen)