



How to use the Common Framework trial template

For organizations curious about the Common Framework V1.0 methodology



COMMON APPROACH
TO IMPACT MEASUREMENT

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What is this guide for?

Purpose:

This guide is for using the Common Framework v1.0 trial template in Excel to work through all five steps of the [Common Framework Version 1.0](#) process.

The trial template in Excel is designed to help impact measurement professionals familiarize themselves with the process of structuring, harmonizing, grouping, and aggregating impact metrics *from a single portfolio and for a single reporting year*.

This guide will help users understand how to:

- Structure and clean impact data
- Understand the core aggregation logic of the Common Framework
- Group metrics into themes and headline indicators
- Apply simple harmonization decisions
- Build portfolio-level aggregations

This guide and template are intended for beginners or the curious. For a more advanced exploration, please review the full [Common Framework v1.0 methodology](#).



Common Framework Version 1.0 Trial Template in Excel

The Common Framework V1.0 trial template is designed to help users understand, test, and apply the Common Framework methodology using real portfolio data.

What it is:

- A learning tool to demonstrate how Common Framework organizes, harmonizes, and aggregates portfolio-level impact data.
- A prototyping tool that allows impact measurement practitioners to test the methodology on their own portfolios and explore different aggregation approaches.

What it is not:

- A fully automated aggregation system.
- An advanced tool for things like automated conversions, advanced transformations, multi-year analysis, or full validation workflows.



Download the blank template
to enter your own portfolio data.



Download the example template
as a reference alongside the blank version.

For organizations seeking more advanced implementation options, please [contact Common Approach](#) about using the [Common Impact Data Standard](#) and supporting digital tools to implement the Common Framework.



Excel workbook architecture

The Trial Template workbook is organized into **seven tabs** that reflect the main steps of the Common Framework aggregation workflow. Together, these tabs support the process of organizing metrics, grouping similar constructs, harmonizing values, defining headline indicators, and reviewing portfolio-level aggregation results. Dedicated Exclusions and Transformation tabs provide transparency into aggregation decisions and assumptions.

Tab	Overview
Welcome	Overview of the Trial Template and definitions for the fields used throughout the workbook.
Themes	Defines the high-level impact themes used to organization portfolio indicators (e.g. Housing, Climate, Financial Inclusion, etc.)
Roll-up	Main working tab where users enter metrics, assign themes, apply harmonization decisions, map metrics to headline indicators, and document exclusions and notes.
Headline Indicators	Defines the portfolio-level headline indicators used for aggregation and reporting.
Aggregation review	Displays aggregated results by headline indicator and theme to support validation and review.
Exclusions	Lists metrics excluded from aggregation, along with the rationale and supporting notes.
Transformations	Lists metrics that have undergone proxy-value or derived-value transformations, including supporting notes.



Before you begin: Enter your data into the roll-up tab

Start by entering your source data in the **Roll-up** tab.

Use one row per metric. Each row should represent one reported metric from one organization for one reporting year.

Outcome							
	A	B	C	D	E	F	G
	Organization name	Indicator	Unit of measure	Unit Description	Outcome (optional)	Year	Indicator Report
1							
2	SPO 1	Displaced Gas Generation	Unspecified Unit	[None provided]	Reduced GHG	2025	1200
3	SPO 1	Tonnes of GHG Reduced	Tonne	Tonnes	Reduced GHG	2025	33
4	SPO 10	# of students	Count	Students	Expanded access to large-scale education initiatives	2025	11499915
5	SPO 11	Clients Cost Saving	Canadian Dollar	\$	Reduced financial barriers to accessing education	2025	1200049
6	SPO 11	Clients Cost Saving	Canadian Dollar	\$	Reduced financial burden for accessing healthcare	2025	12000
7	SPO 11	% increase in representation of underrepresented groups	Percent	%	Increased diversity and representation in healthcare workforce	2025	0,08
8	SPO 11	Candidates Screened	Count	Individuals	Increased access to healthcare services for patients	2025	30071
9	SPO 11	Recruiter Time Saved (hours)	Count	Hours	Increased efficiency in job placement and hiring processes in the healthcare system	2025	37444
10	SPO 12	# of students	Count	Students	Increased access to education for targeted or underserved populations	2025	1000088

Roll-up



Before you begin: Enter your data into the roll-up tab

Complete the following fields:

Field	Description
Organization name	Name of the organization, project, fund, or investee reporting the indicator.
Indicator	The name of the indicator being measured and reported by the organization. This identifies the outcome, output, or activity that the reported values relate to.
Unit of measure	The unit used to quantify the indicator (e.g. count, percentage, ratio, CAD, days, tonnes CO ₂ e).
Unit description (Optional)	A short clarification of what the unit counts or represents in practice (e.g. students, people, businesses, services delivered, etc.)
Outcome (Optional)	The broader outcome or result this indicator contributes to, if known.
Year	The reporting year associated with the indicator report.
Indicator Report	The numerical value reported by the organization. There should be one indicator value for each reporting period.



Before you begin: Enter your data into the metric roll-up tab

Example:

Organization name	Indicator	Unit of measure	Unit Description	Outcome (optional)	Year	Indicator Report
SPO* 1	Tonnes of GHG Reduced	Tonne	Tonnes	Reduced GHG	2025	33
SPO 2	Patients Assessed	Count	Individuals	Improved access to diagnostic and assessment services	2025	1990
SPO 2	Reduced Length of Stay per Patient (days)	Count	Days	Improved patient experience and reduced time burden	2025	32
SPO 3	Patients	Count	Patients	Increased access to healthcare services	2025	98953
SPO 4	# of Users	Count	Individuals	Improved smoking cessation	2025	252
SPO 4	# of users that successfully quit smoking	Count	Individuals	Improved smoking cessation	2025	53

*SPO: social purpose organization



A note on data quality

You do not need perfect data to begin.

Use real portfolio data, even if it is incomplete, inconsistent, or messy. The goal is to get started and improve over time.



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Group metrics by themes

2

Harmonize units

3

Develop headline indicators

4

Aggregate and validate portfolio-level results

5

Consolidate your aggregation policies

The five steps of the Common Framework





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Communicate results

Step 1





Use the **Themes tab** to define the high-level themes that will organize your portfolio data.

- In this starter template, only one set of themes is used throughout the workbook. These themes will populate the dropdown menus in the Roll-up and Headline Indicators tabs.
- You may also optionally include short theme definitions to clarify what types of outcomes, results, or activities belong within each theme.

A		B
1	Themes	Themes definitions
2	Access to Quality Healthcare	Improving the availability, accessibility, affordability, and quality of healthcare products and services for individuals, particularly underserved or vulnerable populations, to support better
3	Access to Quality Education	Expanding access to inclusive, equitable, and high-quality education and training opportunities, enabling individuals to acquire knowledge, skills, and competencies that improve life outcomes,
4	Climate Change Mitigation	Reducing or preventing greenhouse gas (GHG) emissions through activities such as renewable energy generation, energy efficiency, sustainable transportation, and other solutions that
5	Quality Jobs	Creating and sustaining decent work opportunities that provide fair wages, safe working conditions, job security, and opportunities for advancement, while respecting workers' rights
6	Waste management	Supporting the reduction, reuse, recycling, and responsible disposal of waste, including solid, hazardous, and electronic waste, to minimize environmental harm and promote circular
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18		

Example of a populated Themes tab.

1.2

Link bottom-up metrics to your themes



Go to the **Roll-up tab** and use the **Primary theme** column to assign each indicator to the theme it most directly contributes to.

- Themes help organize diverse bottom-up metrics into broader impact categories that can later support grouping, harmonization, and aggregation.

Organization name	Indicator	Unit of measure	Unit Description	Outcome (optional)	Year	Indicator Report	Primary theme
SPO 1	Displaced Gas Generation	Unspecified Unit	[None provided]	Reduced GHG	2025	1200	Climate Change Mitigation
SPO 1	Tonnes of GHG Reduced	Tonne	Tonnes	Reduced GHG	2025	33	Climate Change Mitigation
SPO 10	# of students	Count	Students	Expanded access to large-scale education initiatives	2025	11499915	Access to Quality Education
SPO 11	Clients Cost Saving	Canadian Dollar	\$	Reduced financial barriers to accessing education	2025	1200049	Access to Quality Education
SPO 11	Clients Cost Saving	Canadian Dollar	\$	Reduced financial burden for accessing healthcare	2025	12000	Access to Quality Healthcare
SPO 11	% increase in representation of underrepresented groups	Percent	%	Increased diversity and representation in healthcare workforce	2025	0,08	Access to Quality Healthcare
SPO 11	Candidates Screened	Count	Individuals	Increased access to healthcare services for patients	2025	30071	Access to Quality Healthcare
SPO 11	Recruiter Time Saved (hours)	Count	Hours	Increased efficiency in job placement and hiring processes in the healthcare system	2025	37444	Access to Quality Healthcare
SPO 12	# of students	Count	Students	Increased access to education for targeted or underserved populations	2025	1000088	Access to Quality Education
SPO 13	# Schools	Count	Schools	Improved student learning outcomes	2025	3461	Access to Quality Education

Example of a populated Primary theme column.



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Step 2



2.1

Define the set of common units for your framework



Use the **Common unit** column in the Roll-up tab to define the shared unit that each metric will contribute to for aggregation.

Example: filter applied “Individuals” in unit description and “Access to Quality Healthcare” in Primary theme

Organization name	Indicator	Unit of measure	Unit Description	Outcome (optional)	Primary theme	Common unit
SPO 2	Patients Assessed	Count	Individuals	Improved access to diagnostic and assessment services	Access to Quality Healthcare	Individuals
SPO 4	Number of users	Count	Individuals	Improved smoking cessation	Access to Quality Healthcare	Individuals
SPO 4	# of users that successfully quit smoking	Count	Individuals	Improved smoking cessation	Access to Quality Healthcare	Individuals
SPO 5	Patients in Alzheimer's Clinical Trial	Count	Individuals	Decrease in agitation in patients with Alzheimer's	Access to Quality Healthcare	Individuals
SPO 6	# Clinicians using software X	Count	Individuals	Improved access to medical resources and more efficient information delivery for clinicians	Access to Quality Healthcare	Individuals
SPO 6	Clinicians Served	Count	Individuals	Improved access to medical resources and more efficient information delivery for clinicians	Access to Quality Healthcare	Individuals
SPO 7	# Patients served digitally (output)	Count	Individuals	Improved patient health outcomes	Access to Quality Healthcare	Individuals
SPO 7	Improved health outcomes	Count	Patients	Improved patient health outcomes	Access to Quality Healthcare	Individuals



Tip: Use filters on Unit description and Primary theme to help identify metrics that may reasonably contribute to the same common unit.

2.2

Apply conversions and transformations



Once common units have been defined, use the **harmonization fields** in the Roll-up tab to document how each indicator contributes to its common unit.

Steps for direct equivalence:

- Select “direct equivalence” in the Harmonization type column
- Enter 1 in the Value factor column

Result: the harmonized value will be equal to the original metric value

Example of direct equivalences:



Organization name	Indicator	Unit of measure	Unit Description	Indicator Report	Primary theme	Common unit	Harmonization type	Harmonization formula	Value factor	Harmonized value
SPO 1	Tonnes of GHG Reduced	Tonne	Tonnes	33	Climate Change Mitigation	Tonnes	Direct equivalence		1	33
SPO 2	Patients Assessed	Count	Individuals	1990	Access to Quality Healthcare	Individuals	Direct equivalence		1	1990
SPO 4	# of Users	Count	Individuals	252	Access to Quality Healthcare	Individuals	Direct equivalence		1	252
SPO 5	Patients in Alzheimer's Clinical Trial	Count	Individuals	219	Access to Quality Healthcare	Individuals	Direct equivalence		1	219
SPO 6	# Clinicians using software X	Count	Individuals	483829	Access to Quality Healthcare	Individuals	Direct equivalence		1	483829
SPO 7	Admin Costs Saved	Canadian Dollar	\$	129799931	Access to Quality Healthcare	CAD\$	Direct equivalence		1	129799931
SPO 16	CO2eq emissions avoided/reduced	Tonne	Metric Tonnes	122	Climate Change Mitigation	tCo2e	Direct equivalence		1	122
SPO 17	Tonnes of CO2e avoided	Tonne	Tonnes	291	Climate Change Mitigation	Tonnes	Direct equivalence		1	291



2.2

Apply conversions and transformations

Steps for **fixed-value conversion**:

- Select “fixed-value conversion” in the Harmonization type column
- Enter the conversion rule in the Harmonization formula column
- Enter the numeric conversion multiplier in the Value factor column
- Document any relevant assumptions, references, or sources in the Notes & sources column

Result: the harmonized value is automatically calculated using the specified conversion factor.

Example of fixed-value conversions:

Organization name	Indicator	Unit of measure	Unit Description	Indicator Report	Primary theme	Common unit	Harmonization type	Harmonization formula	Value factor	Harmonized value	Notes & sources
SPO 6	Clinicians Costs Saved	Unspecified Unit	USD\$	45000	Access to Quality Healthcare	\$	Fixed-value conversion	Indicator value * 1,36	136	61200	Annual average exchange rate in 2024 (source: Bank of Canada) 1.00 USD = 1.36 CAD
SPO 18	CO2eq / GHG emissions displaced, avoided, mitigated, and/or reduced	Gigatonne	Gigatonnes of CO2e	12	Climate Change Mitigation	tCo2e	Fixed-value conversion	Indicator value *1,000,000,000	1000000000	12000	1 gigatonne (Gt) = 1,000,000,000 tonnes (tCO ₂)
SPO 19	Gallons of water saved in manufacturing lithium ion batteries (compared with traditional methods)	Unspecified Unit	Gallons	453	Waste management	m3	Fixed-value conversion	Indicator value x 0,378541	378,541	171,479,073	1 US gallon = 0.00378541 cubic metres



2.2

Apply conversions and transformations

Steps for proxy-value or derived-value transformation:

- Select “proxy-value transformation” or “derived-value transformation” in the Harmonization type column
- Enter the transformation rule in the Harmonization formula column
- Enter the numeric transformation multiplier in the Value factor column

Document any relevant assumptions, references, or sources in the Notes & sources column

Result: the harmonized value is automatically calculated using the transformation factor

Example of transformations:

Organization name	Indicator	Unit of measure	Unit Description	Indicator Report	Primary theme	Common unit	Harmonization type	Harmonization formula	Value factor	Harmonized value	Notes & sources
SPO 2	Reduced Length of Stay per Patient (days)	Count	Days	32	Access to Quality Healthcare	Days	Proxy-value transformation	Indicator value / 230	4,348	139,136	Source: Canadian Institute for Health Information: https://www.cihi.ca/en/the-state-of-the-health-workforce-in-canada-2024 1 FTE = 37.5 hours/week 1 FTE year = 230 working days (after vacation and holidays) FTE (annual) = Total FTE days / 230
SPO 5	% decrease in agitation for Alzheimer's patients	Percent	%	16	Access to Quality Healthcare	%	Derived-value transformation	Indicator value * number of patients	219	35	Included as a clinically relevant proxy for improved health outcomes, converted to a user count using the trial population (n=219), with the assumption that reductions in agitation reflect patient-level improvement.
SPO 8	Graduation Rate	Percent	%	61	Access to Quality Education	%	Derived-value transformation	Indicator value * number of students enrolled	40476	24690	graduation rate as part of completion of an education milestone. Multiplied by the total of students enrolled to get the absolute value of number of students demonstrating completion of education milestones.



2.3

Exclude metrics

To exclude a metric from the aggregation:

- In the Exclusion flag column, select “Excluded”
- In the Exclusion rationale column, choose the appropriate reason (e.g., double counting, not material, further research needed, etc.)
- In the Notes & sources column, briefly explain the rationale for exclusion
- In the Value factor column, enter 0 to ensure the metric is not included in the aggregation calculations

Result: the metric will remain documented in the workbook for transparency and auditability but will not contribute to aggregated portfolio results.

Example of exclusions



Organization name	Indicator	Unit of measure	Unit Description	Indicator Report	Primary theme	Value factor	Exclusion flag	Exclusion rationale	Notes & sources
SPO 4	# of successful smoking cessation attempts (% improvement compared to current methods)	Count	Smoking cessation attempts	123	Access to Quality Healthcare	0	Excluded	Double counting	SPO reported on an indicator "# of users that successfully quit smoking" that got aggregated in the headline
SPO 6	% users that make, modify, or support treatment decisions after using software X	Percent	%	73	Access to Quality Healthcare	0	Excluded	Not material	Not counting an outcome. The metric doesn't say if the behavior is positive or negative
SPO 6	Improved Patient Outcome	Percent	%	81	Access to Quality Healthcare	0	Excluded	Additional information required	No metric on the count of users, impossible to transform.



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Step 3



3.1

Drafting headline indicators



Begin by filtering in the Roll-up tab using Primary theme and Common unit

- Review the filtered metrics to identify the shared underlying outcome or construct they represent
- Group together metrics that are judged to reflect a sufficiently similar construct for aggregation

Example: Viewing the sheet with filters applied: "Individuals" in the Common unit column, "Access to Quality Healthcare" in Primary theme column

Organization name	Metric name	Unit of measure	Unit Description	Outcome (optional)	 Primary theme	 Common unit	Headline indicator
SPO 6	# Clinicians using software X in underserved regions	Count	Individuals	Improved access to medical resources and more efficient information delivery for clinicians	Access to Quality Healthcare	Individuals	
SPO 6	# Clinicians using software	Count	Individuals	Improved access to medical resources and more efficient information delivery for clinicians	Access to Quality Healthcare	Individuals	
SPO 2	Patients Assessed	Count	Individuals	Improved access to diagnostic and assessment services	Access to Quality Healthcare	Individuals	
SPO 3	Patients	Count	Patients	Increased access to healthcare services	Access to Quality Healthcare	Individuals	
SPO 4	# of Users	Count	Individuals	Improved smoking cessation	Access to Quality Healthcare	Individuals	
SPO 5	Patients in Alzheimer's Clinical Trial	Count	Individuals	Decrease in agitation in patients with Alzheimer's	Access to Quality Healthcare	Individuals	
SPO 4	# of users that successfully quit smoking	Count	Individuals	Improved smoking cessation	Access to Quality Healthcare	Individuals	
SPO 7	Improved health outcomes	Count	Patients	Improved patient health outcomes	Access to Quality Healthcare	Individuals	



Tip: Pay attention to differences in what is being measured, level of depth, positioning on the impact pathway

3.1

Drafting headline indicators



Go to the **Headline Indicators** tab and create a new headline indicator that clearly describes the common outcome represented by the group of metrics.

B15		
	A	B
1	Headline indicators	Definitions
	Clinicians served	
7		
	Patients served	
9		
	Patients reporting improved health outcomes	
10		
15		
16		
17		
18		
19		
20		
21		
22		

Welcome Themes Roll-up Headline indicators Aggregation review Exclusions Transformati

Example of a populated Headline Indicators column in the Headline Indicator tab.

3.1

Drafting headline indicators



Return to the Roll-up tab and use the **Headline Indicator** column to assign the newly created headline indicator to the relevant metrics (the list of available headline indicators is populated from the Headline indicators tab).

Repeat this process until all metrics that can reasonably be grouped have been assigned to a headline indicator.

	A	B	E	H	I	N
	Organization name	Indicator	Outcome (optional)	Primary theme	Common unit	Headline indicator
1						
29	SPO 2	Patients Assessed	Improved access to diagnostic and assessment services	Access to Quality Healthcare	Individuals	Patients served
32	SPO 4	# of Users	Improved smoking cessation	Access to Quality Healthcare	Individuals	Patients served
33	SPO 4	# of users that successfully quit smoking	Improved smoking cessation	Access to Quality Healthcare	Individuals	Patients reporting improved health outcomes
34	SPO 4	# of successful smoking cessation attempts (% improvement compared to current methods)	Improved smoking cessation	Access to Quality Healthcare	Individuals	Patients reporting improved health outcomes
39	SPO 6	# Clinicians using software X in underserved regions	Improved access to medical resources and more efficient information delivery for clinicians	Access to Quality Healthcare	Individuals	Clinicians served
40	SPO 6	# Clinicians using software	Improved access to medical resources and more efficient information delivery for clinicians	Access to Quality Healthcare	Individuals	Clinicians served
259						
260						
261						
262						
263						
264						
265						
266						
267						

Example of a populated Headline Indicators column in the roll-up tab.

3.2

Refine headline indicators



Review and refine headline indicators iteratively to ensure conceptual coherence across grouped metrics.

- **Filter one Headline indicator** at a time in the Roll-up tab and review all metrics contributing to it.
- Check alignment: Assess whether the grouped metrics genuinely represent the same underlying construct or outcome (e.g., access vs. outcomes, individuals vs. system, direct vs. indirect impact).
- Adjust if needed: exclude, reassign or update transformations if a metric doesn't fit well.

Example: View of metrics for associated with “Students supported through education programs”, by applying a filter to the Headline indicator column

Organization name	Indicator	Unit of measure	Unit Description	Outcome (optional)	Indicator Report	Primary theme	 Headline indicator
SPO 8	Student Enrollment	Count	Individuals	Increased access to education programs	40476	Access to Quality Education	Students supported through education programs
SPO 10	# of students	Count	Students	Expanded access to large-scale education initiatives	11499915	Access to Quality Education	Students supported through education programs
SPO 12	# of students	Count	Students	Increased access to education for targeted or underserved populations	1000088	Access to Quality Education	Students supported through education programs
SPO 13	Number of children assessed to identify early literacy challenges	Count	Individuals	Improved literacy in students	59972	Access to Quality Education	Students supported through education programs
SPO 14	# of students	Count	Students	Improve a child's opportunity to participate in the future of work	492771	Access to Quality Education	Students supported through education programs
SPO 14	# of students prepared for the future of work success	Count	Individuals	Improve a child's opportunity to participate in the future of work	1000042	Access to Quality Education	Students supported through education programs

3.2

Refine headline indicators



Use the Headline Indicators tab to refine and document the headline indicators created in step 3.1.

- Review each headline indicator and develop a clear working definition based on the common concept represented by the metrics assigned to it. Specify what is included and what is intentionally excluded.
- Then, return to the Roll-up tab and review the underlying metrics mapped to each headline indicator and remove any that no longer fit the refined definition.

C19		
	A	B
1	Headline indicators	Definitions
	Clinicians served	Total number of unique healthcare professionals who used or benefited from a product, service, or intervention designed to support their work.
7	Patients served	Total number of unique patients who received a healthcare service, intervention, or were reached by a solution, regardless of changes in health outcomes. Includes: patients assessed, treated, enrolled, or reached digitally
9	Patients reporting improved health outcomes	Total number of unique patients who experienced and reported a measurable improvement in their health status, attributable or meaningfully linked to the intervention. Includes indicators based on direct counts or percentage-based transformations applied to known populations.
10		
15		
16		
17		
18		
19		
20		
21		
22		

Welcome Themes Roll-up **Headline indicators** Aggregation review Exclusions Transformati ...

3.3

Maintain an audit trail



- In the Roll-up tab, ensure all rows contributing to each headline indicator are fully documented in the spreadsheet so that the aggregation decisions are transparent, traceable and reviewable over time.
- Do not delete original reported values or overwrite intermediate calculations.

Indicator											
	A	B	G	J	K	L	M	N	O	P	Q
	Organization name	Indicator	Indicator Report	Harmonization type	Harmonization formula	Value factor	Harmonized value	Headline indicator	Exclusion flag	Exclusion rationale	Notes & sources
13	SPO 13	Number of children identified as at-risk and that would have otherwise been missed	107			0	0	Students supported through education programs	Excluded	Double counting	Excluded because we already aggregated "Number of children assessed to identify early literacy challenges" for the same SPO in this headline indicator.
14	SPO 13	Decrease in Literacy Difficulties	0,32	derived-value transformation	indicator value * number of students	59972	19191	Students with improved education outcomes			The indicator "% decrease in literacy difficulties" was converted into a count of students demonstrating improvement by applying the reported percentage change to the total number of children assessed. This assumes that the observed reduction reflects a share of assessed students experiencing measurable improvement in literacy outcomes.
15	SPO 14	# of students	492771	direct equivalence		1	492771	Students supported through education programs			
16	SPO 14	# of students prepared for the future of work success	1000042	direct equivalence		1	1000042	Students supported through education programs			No double counting, because this metric counts number of students for a different program.
17	SPO 14	% teachers reporting decrease in student conflict	0,3			0	0		Excluded	Other (see notes)	Excluded because this indicator is a teacher-level count and reflects perceived classroom-level change. Not verified individual student outcomes.
18	SPO 14	% teachers reporting improvement in general behaviour	0,48			0	0		Excluded	Other (see notes)	Excluded because this indicator is a teacher-level count and reflects perceived classroom-level change. Not verified individual student outcomes.
19	SPO 15	Total Users	1028	direct equivalence		1	1028	Individuals supported in employment pathways			
20	SPO 15	Undeserved Members	987			0	0	Individuals supported in employment pathways	Excluded	Double counting	indicator "Total users" already aggregated
21	SPO 15	Low Income Members	737			0	0	Individuals supported in employment pathways	Excluded	Double counting	indicator "Total users" already aggregated
22	SPO 15	% students hired after program completion	0,01	derived-value transformation	indicator value * number of students	1028	10	Students with improved education outcomes			Direct student-level outcome reflecting completion and employability, transformation from percentage to count using the known participant base (n=1028)
23	SPO 16	CO2eq emissions avoided/reduced (indicator tonnes)	122	direct equivalence		1	122	GHG reduced or avoided (tCO2e)			
	SPO 17	GHG reduced or avoided (tCO2e)	201	direct equivalence		1	201	GHG reduced or avoided (tCO2e)			



3.4

Align with external standards



In the Headline Indicators tab, use the **External standards alignment** column to document any relevant alignment with recognized external frameworks, standards, or taxonomies.

Where applicable, note similar or related metrics, indicators, or categories used in frameworks such as SDGs, IRIS+, OECD, ICMA, HIPSO, GRI, etc.

IRIS+ PI4060 Client Individuals: Total (Partial – healthcare professionals served)			
A	B	C	D
Headline indicators	Definitions	Primary theme	External standards alignment
Students supported through education programs	Total number of unique students who accessed education or talent development programs, including enrollment, participation, or assessment activities, regardless of demonstrated outcomes.	Access to Quality Education	IRIS+ PI4060 Client Individuals: Total (Partial – education beneficiaries) SDG 4 Quality Education (Conceptual)
Students with improved education outcomes	Total number of unique students demonstrating improvements in academic performance, social-emotional behaviour or completion of education milestones	Access to Quality Education	IRIS+ education outcome improvement indicators (Partial) SDG 4 Quality Education outcome indicators (Conceptual)
Education cost saved (\$CAD)	Total (estimated and direct) monetary value of education-related costs avoided by individuals (e.g., reduced tuition, program costs).	Access to Quality Education	OECD education affordability and household cost burden outcomes (Conceptual only)
Individuals supported in employment pathways	Total number of unique individuals supported through career development and equitable access to employment. They received services aimed at improving employability or access to jobs (e.g., training, job placement support, internships), regardless of employment outcomes achieved.	Quality Jobs	IRIS+ OI8869 Individuals Trained / workforce development beneficiaries (Partial) SDG 8 Decent Work (Conceptual)
Workforce efficiency gains (days)	Total amount of working time saved across employees or users due to improved processes or tools, converted into equivalent workdays using a standardized assumption (e.g., 8 hours per workday).	Quality Jobs	OECD labour productivity / workplace efficiency outcomes (Conceptual only)
Clinicians served	Total number of unique healthcare professionals who used or benefited from a product, service, or intervention designed to support their work.	Access to Quality Healthcare	IRIS+ PI4060 Client Individuals: Total (Partial – healthcare professionals served) ICMA healthcare beneficiary reporting (Conceptual)
Healthcare costs saved (\$CAD)	Total monetary value of costs avoided across the healthcare system, including administrative, operational, and user-level savings, converted into a common currency where needed. Includes:	Access to Quality Healthcare	OECD health system efficiency / healthcare expenditure reduction outcomes (Conceptual)



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4.1

Prepare a trial aggregation



The **Aggregation Review** tab contains a pre-built pivot table displaying preliminary portfolio-level aggregation results grouped by theme and headline indicator.

After making changes in the Roll-up tab, **refresh** the pivot table to update the aggregation results.

Primary theme	Headline indicator	Indicator	Indicator Report	Sum of Harmonized value
Access to Quality Education	Education cost saved (\$CAD)			1200049
	Students supported through education programs			14093264
	Students with improved education outcomes			43891,68
Access to Quality Healthcare	Clinicians served			483829
	Healthcare costs saved (\$CAD)			129873131
	Patients reporting improved health outcomes			4000181,04
	Patients served			4142529
Climate Change Mitigation	GHG reduced or avoided (tCO2e)			1413446
Quality Jobs	Individuals supported in employment pathways			1028
Waste management	Waste avoided (kg)			40000
	Water saved (m3)			1717,766062

4.2

Finalize the aggregation



Use the **+** **button** next to each headline indicator to expand the pivot table and review the underlying metrics contributing to the headline indicator.

Confirm that:

- All included metrics represent a sufficiently similar construct.
- Unrelated metrics have not been grouped together.
- Excluded metrics are not contributing to the aggregation.

Where corrections are needed

- Return to the Roll-up tab
- Revise mappings, common units, harmonization decisions or exclusions as needed.
- Refresh the pivot table in the Aggregation Review tab
- Review the updated results again

1	A	B	C	D	E
2	Exclusion flag	(blank)			
3					
4	Primary theme	Headline Indicator	Indicator	Indicator Report	Sum of Harmonized value
5	Access to Quality Education	Education cost saved (\$CAD)	Clients Cost Saving	1200049	1200049
6		Students supported through education programs	# of students	492771	492771
7				1000088	1000088
8				11499915	11499915
9			# of students prepared for the future of work su	1000042	1000042
10			Number of children assessed to identify early lit	59972	59972
11			Student Enrollment	40476	40476
12		Students with improved education outcomes	% students hired after program completion	0,01	10,28
13			Decrease in Literacy Difficulties	0,32	19191,04
14			Graduation Rate	0,61	24690,36
15	Access to Quality Healthcare	Clinicians served	# Clinicians using software	483829	483829
16		Healthcare costs saved (\$CAD)	Admin Costs Saved	129799931	129799931
17			Clients Cost Saving	12000	12000
18			Clinicians' Costs Saved	45000	61200
19		Patients reporting improved health outcomes	# of users that successfully quit smoking	53	53
20			% decrease in agitation for Alzheimer's patients	0,16	35,04
21			Improved health outcomes	4000093	4000093
22		Patients served	# of Users	252	252
23			# Patients served digitally (output)	4011044	4011044
24			Candidates Screened	30071	30071
25			Patients	98953	98953
			Patients Assessed	1000	1000



Group metrics by themes

1

2

Harmonize units

3

Develop headline indicators

4

Aggregate and validate portfolio-level results

5

Consolidate your aggregation policies

Step 5



5.1

Compile your methodological evidence base



Go to the **Exclusions** tab.

Any metrics marked as Excluded in the Roll-up tab will automatically appear here, along with their associated notes and supporting sources.

Review the list to confirm that:

- All intended exclusions are captured.
- Exclusion rationales have been documented.
- Supporting sources and evidence have been provided where appropriate.

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Organization name	Indicator	Indicator Report	Exclusion rationale	Notes & sources
SPO 13	# Schools	3461	Double counting	The indicator " Number of children assessed to identify early literacy challenges" is already counted for this SPO.
SPO 13	Number of children identified as at-risk and that would have otherwise been missed	107	Double counting	Excluded because we already aggregated "Number of children assessed to identify early literacy challenges" for the same SPO in this headline indicator.
SPO 15	Undeserved Members	987	Double counting	indicator "Total users" already aggregated
SPO 15	Low Income Members	737	Double counting	indicator "Total users" already aggregated
SPO 19	% Reduced CO2e emissions	0,37	Double counting	Already aggregating the absolute number within the same headline.
SPO 4	# of successful smoking cessation attempts (% improvement compared to current methods)	123	Double counting	SPO reported on an indicator "# of users that successfully quit smoking" that got aggregated in the headline
SPO 5	% reduction in somatic stress and anxiety	1	Double counting	excluded because risk of double count with this indicator: % decrease in agitation for Alzheimer's patients
SPO 6	# Clinicians using software X in underserved regions	44368	Double counting	Already aggregated the indicator "# Clinicians using software" for the same SPO
SPO 8	Pass Rate	0,97	Double counting	Already aggregated the indicator "graduation rate" as part of completion of an education milestone as evidence of improvement. We're undercounting shorter-term outcome for conservative principle.
SPO 1	Displaced Gas Generation	1200	Missing data	Unit not specified
SPO 6	Improved Patient Outcome	0,81	Missing data	No indicator on the count of users, impossible to transform.
SPO 6	% users that make, modify, or support treatment decisions after using software X	0,73	Not material	Not counting an outcome. The indicator doesn't say if the behavior is positive or negative
SPO 9	Carbon Emissions Diverted	750	Not material	Excluded as it represents avoided (diverted) emissions rather than direct reductions (headline)
SPO 11	% increase in representation of underrepresented groups	0,08	Other (see notes)	Missing the actual count to meaningfully aggregate.
SPO 14	% teachers reporting decrease in student conflict	0,3	Other (see notes)	Excluded because this indicator is a teacher-level count and reflects perceived classroom-level change. Not verified individual student outcomes.
SPO 14	% teachers reporting improvement in general behaviour	0,48	Other (see notes)	Excluded because this indicator is a teacher-level count and reflects perceived classroom-level change. Not verified individual student outcomes.
SPO 7	Reduction in Clinical Admin Burden	1200	Other (see notes)	Units not specified.
SPO 8	Exams Completed	2300	Other (see notes)	No adjacent indicator with the same construct. Can be reconsidered when more indicators come in.

5.1

Compile your methodological evidence base



Go to the **Transformations** tab.

Any metrics that use a Proxy Value or Derived Value transformation in the Roll-up tab will automatically appear here, along with their associated notes and supporting sources.

Review the list to confirm that:

- All intended transformations are captured.
- Transformation methods have been documented.
- Assumptions, calculations, and supporting sources have been provided where appropriate.

	A	B	C	D	E	F
	Organiz ation name	Indicator	Indicator Report	Harmonization type	Harmonized value	Notes & sources
1	SPO 11	Recruiter Time Saved (hours)	37444	proxy-value transformation	18,00192308	Source: Canada Labour Code (https://laws-lois.justice.gc.ca/eng/acts/L-2/) Assumes an 8-hour standard workday, based on Canadian labour standards and common full-time work conventions (40 hours/week). Assuming 2080 hours per year.
2	SPO 13	Decrease in Literacy Difficulties	0,32	derived-value transformation	19191,04	The indicator "% decrease in literacy difficulties" was converted into a count of students demonstrating improvement by applying the reported percentage change to the total number of children assessed. This assumes that the observed reduction reflects a share of assessed students experiencing measurable improvement in literacy outcomes.
3	SPO 15	% students hired after program completion	0,01	derived-value transformation	10,28	Direct student-level outcome reflecting completion and employability, transformation from percentage to count using the known participant base (n=1028)
4	SPO 2	Reduced Length of Stay per Patient (days)	32	proxy-value transformation	0,139136	Source: Canadian Institute for Health Information: https://www.cihi.ca/en/the-state-of-the-health-workforce-in-canada-2024 1 FTE = 37.5 hours/week 1 FTE year = 230 working days (after vacation and holidays) FTE (annual) = Total FTE days / 230
5	SPO 5	Time (days) reduced in patient stays	66	proxy-value transformation	0,286968	Source: Canadian Institute for Health Information: https://www.cihi.ca/en/the-state-of-the-health-workforce-in-canada-2024 1 FTE = 37.5 hours/week 1 FTE year = 230 working days (after vacation and holidays) FTE (annual) = Total FTE days / 230
6	SPO 5	% decrease in agitation for Alzheimer's patients	0,16	derived-value transformation	35,04	Included as a clinically relevant proxy for improved health outcomes, converted to a user count using the trial population (n=219), with the assumption that reductions in agitation reflect patient-level improvement.
7	SPO 6	Avg. minutes saved per week per clinician	22	proxy-value transformation	4435,099167	The calculation converts average weekly time savings per clinician into an annual, system-wide full-time equivalent. FTE-years saved = (22 minutes/week × 46 weeks × 483,829 clinicians) ÷ (60 minutes × 8 hours × 230 working days) Calculated on 46 weeks worked and 8 hours of work/day. Industry norm as of Canadian Institute for Health Information
8	SPO 7	Days of repetitive clinical administrative burden	5555	proxy-value	24 15314	Source: Canadian Institute for Health Information: https://www.cihi.ca/en/the-state-of-the-health-workforce-in-canada-2024 FTE = 37.5 hours/week

Transformations



Continuing beyond the trial template

This guide covers the Common Framework process through Step 5.1. More advanced elements of Step 5—including additional validation, interpretation, documentation, and governance processes—are outside the scope of this trial template.

The purpose of this guide is to help users begin testing and applying the methodology using real portfolio data in a lightweight and accessible Excel workflow.

As implementation maturity grows, users may choose to expand toward:

- more advanced quality control and review processes,
- multi-year aggregation workflows,
- Common Impact Data Standard implementation,
- and more automated aggregation and reporting tools.

For support with your trial, you can [book a meeting with the Common Approach team](#) to review your aggregation work and discuss potential next steps.

For guidance on implementing the Common Framework using the Common Impact Data Standard and more advanced structured data workflows, please [contact Common Approach](#).



Thank you!



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