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- 01 what's happening + in the news
- 02 accountability + measurement
- 03 choosing indicators
- 04 logic model vs theory of change
- 05 success factors + pitfalls to avoid

**TODAY'S CLASS**

2





**Hear from Sauder Marketing Professors:**

- A fantastic opportunity to meet and network with Sauder's amazing marketing professors

**Professors come from:**

- Market Research, Agencies, PR, Communications, Sales and Business Development, Digital Marketing, Sustainability & Non-Profit Marketing, and Product & Brand Management

**When: Wednesday, October 25th from 5:00-7:00 pm**

**Where:** Bruce R. Birmingham Undergraduate Centre (in-person)


**RSVP Form:**

[https://docs.google.com/forms/d/e/1FAIpQLStOZBX5w7EQwOCsOiBWC0\\_Kb81aV4E\\_z-4lXFp4p0k2anzX-A/viewform?usp=sf\\_link](https://docs.google.com/forms/d/e/1FAIpQLStOZBX5w7EQwOCsOiBWC0_Kb81aV4E_z-4lXFp4p0k2anzX-A/viewform?usp=sf_link)

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## Seventh Generation Launches Comprehensive Framework for Calculating Corporate Climate Impacts

September 2022



**2021 Corporate Consciousness Report**

Founding principle (1988) ~ *Corporations could be a powerful force for positive change and play an important role in securing a just and sustainable world.*

Climate Impact: Footprints + Fingerprints

quantitative

- **Carbon Footprint** ~ operation, sourcing, production, product use (i.e. Scope 1-3 emissions)
- **Carbon Fingerprint** ~ generated by corporate investments + cash (i.e. money held by Unilever's banking partners)

qualitative

- **Matrix of climate impact best practices** (transparency, commitments, business integration, leadership) ~ to evaluate climate performance of service providers (scale: lagging, progressing, leading)

<https://sustainablebrands.com/read/new-metrics/seventh-generation-launches-comprehensive-new-framework-for-calculating-corporate-climate-impacts>

[https://www.seventhgeneration.com/sites/default/files/2022-09/SVG\\_Fingerprints\\_Climate\\_Impact\\_Report\\_2021.pdf](https://www.seventhgeneration.com/sites/default/files/2022-09/SVG_Fingerprints_Climate_Impact_Report_2021.pdf)

## IN THE NEWS

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## First-of-Its-Kind Methodology Provides Standard for Measuring Food Waste Across Hotel Chains

September 2021



World Wildlife Fund + Greenview +  
Accor/Hilton/Hyatt/IHG/Marriott

Common approach for hotel industry to  
collect data + measure and report waste.

UN SDG 12.3 + 12.5

[sustainablebrands.com](https://sustainablebrands.com)

<https://sustainablebrands.com/read/new-metrics/first-of-its-kind-methodology-provides-standard-for-measuring-food-waste-across-hotel-chains>

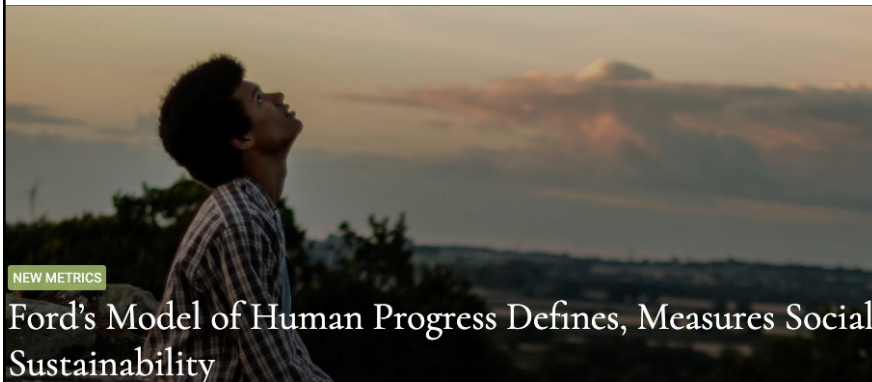


## IN THE NEWS

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## Model of Human Progress ~ reporting on social impact, informing social sustainability-related decision-making + strategy development

October 14 2020



NEW METRICS

### Ford's Model of Human Progress Defines, Measures Social Sustainability

<https://sustainablebrands.com/read/new-metrics/ford-s-model-of-human-progress-defining-and-measuring-social-sustainability>

*Ford partnered with the University of Michigan's Erb Institute for Global Sustainable Enterprise to define social sustainability and identify metrics to track improvements. Many companies engaged in sustainability have clear metrics regarding environmental sustainability, but less so social sustainability.*

Sector agnostic model.

Definition of "S" in ESG elusive



## IN THE NEWS

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image source: sustainablebrands.com

Enhances social dimension of human progress through 4 ways:

1. Preserving human rights
2. Protecting human health, safety and wellbeing
3. Increasing access to mobility  
(represents the “social good” that the company’s products and services provide)
4. Enhancing economic prosperity in the community

# FORD MODEL OF HUMAN PROGRESS

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Stakeholder **trust** (in the company) and **innovation** (in products and processes, which continually improves functions and quality) are key enablers of social impact and human progress..

Table – Summary of the recommended and aspirational metrics identified for the means-level priority impact areas.

How Ford drives Human Progress (“Ends”)	How this impact is achieved (“Means”)	Recommended metric
Increase economic prosperity for the community	Invest in the community, through production	Total cumulative \$ invested into the community <i>Future metric: GDP Impact</i>
	Build capacity for economic prosperity in the community, through philanthropy	
Increase access to the social good provided by company’s product or service (for Ford, this is ‘access to mobility’)	Increase the extent of social good provided (For Ford: Increase the movement of people)	Total mobility vehicle sales (including, if available, other mobility forms) <i>Future metric: Total # people moved</i>
	Decrease cost of products or services (For Ford: Decrease the cost of transportation)	TBD
	Increase connectivity	N/A
Preserve human rights	Preserve human rights, with emphasis on salient issues (e.g. workers’ rights)	Corporate Human Rights Benchmark
Protect human health, safety, and well-being	Protect stakeholders’ physical (including emotional) well-being, related to: <ul style="list-style-type: none"><li>- Target zero employee fatalities &amp; serious injuries, including mental health disabilities (Occupational Health &amp; Safety)</li><li>- Enhance product safety (For study company: Vehicle crashes)</li><li>- Decrease operational and product-level environmental impacts</li></ul>	Occupational Health & Safety: <ul style="list-style-type: none"><li>- Total # employee fatalities (manufacturing)</li><li>- Global lost time case rate (including from mental health)</li></ul> Vehicle Safety: <ul style="list-style-type: none"><li>- % of vehicle lines with 5-star Global NCAP rating</li></ul> Community & Environmental Safety: N/A (disclosed as part of environmental reporting)

# FORD MODEL OF HUMAN PROGRESS

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## Social Problem Situational Analysis

- Well written, well articulated
- Strong narrative
- Well researched – range of sources
- In-depth analysis
- Formatting
- Graphics, appendices
- Course concepts integrated
- References
- Not enough proofreading – grammar, flow, clarity
- Confusing writing style, sentence structures
- Insufficient synthesis
- Topic choice challenging – at times difficult to include all elements in assignment guideline
- Little to no data to support statements
- Solid text – no formatting, no images/graphs



image source: bodyunburdened.com

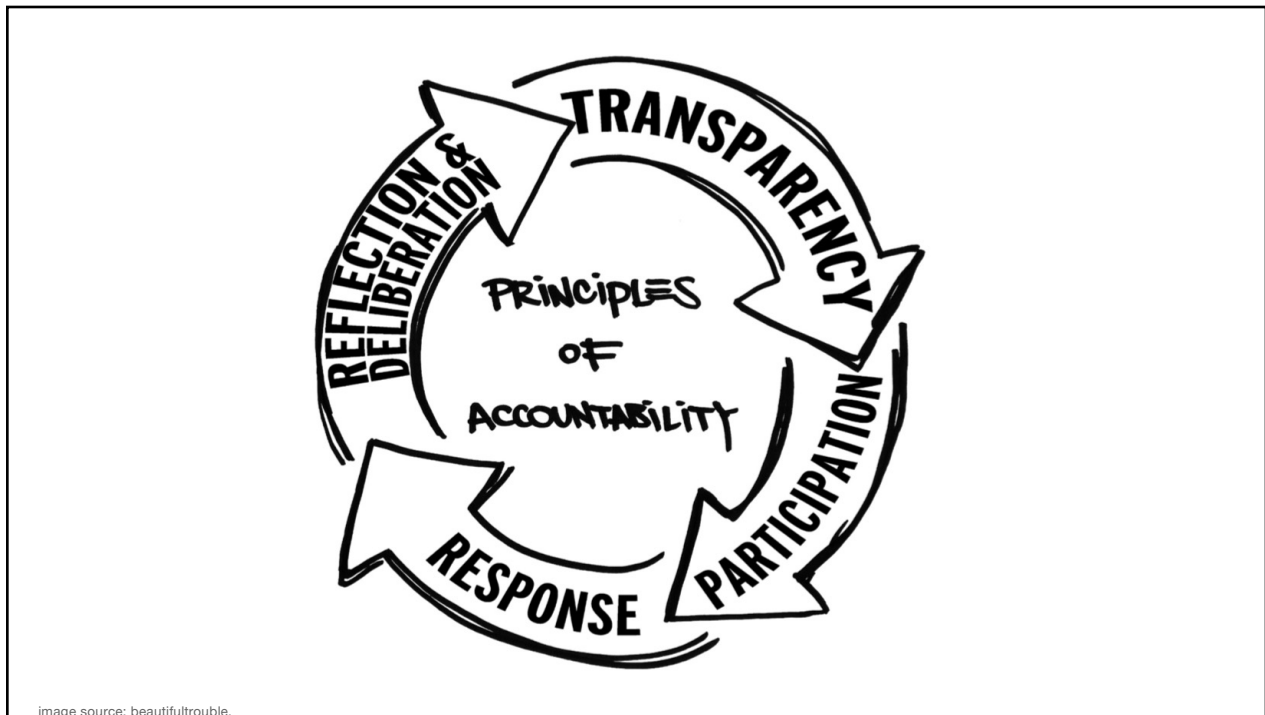
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## Accountability



image source: truthliesdeceptioncovers.info

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When we don't put a number on something, we are giving it the only value that is definitely wrong: ZERO.

*Daniel Aronson, 2013*

Organizations that do nothing but measure the numbers rarely create breakthroughs. Merely better numbers.

*Seth Godin, 2013*

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## Measurement in Practice

- We have expectations about “what should happen”
- We look for feedback
- We adjust course
- It can be hard to identify and explain our assumptions about causal connections between things
- Especially in complex social, political and economic systems where not everyone has the same information
- Clear communication matters if you want to “Prove and Improve”



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*“The market is best served when each organization can measure its social impact in the way that is most meaningful and insightful to its aim and operations, as long as it follows common principles for good measurement.”*

Ruff + Olsen

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<div>Prove</div> <div>Accountability</div> <div>Summative</div>	<div>Improve</div> <div>Management</div> <div>Formative</div>
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	Common Practice	Best Practice
<div>“Proving” (External)</div> <div>Marketing, Communications and Reporting</div>	Selling only the value proposition for the customer	Measuring the positive and negative outcomes in the whole value chain
	Telling a story with data fragments out of an evaluation context	Reporting to a standard, based on materiality analysis
	‘Push’ information	Engaged conversation
<div>“Improving” (Internal)</div> <div>Better Decisions (leading to) Better Outcomes</div>	Evaluation after the fact	Sync data gathering and decision making
	Opaque and closely held decision making	Power and influence to those affected by activities
	Employee engagement is focused on metrics and targets	Employee engagement is about shared learning and identifying opportunities for impact

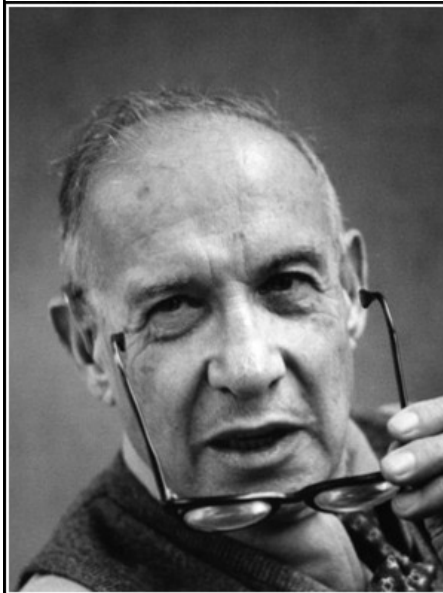
junxion.com

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*“Improving impact is ultimately about making better decisions – decisions that lead to better business outcomes and better social outcomes.”*

Garth Yule, Junxion

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You can't ~~manage~~ <sup>improve</sup> what you don't measure.

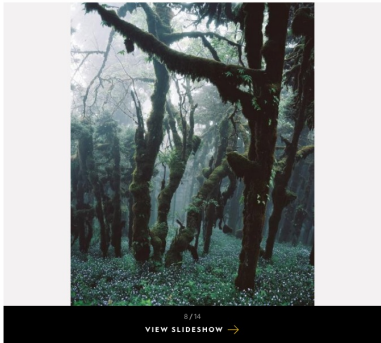
— Peter Drucker —

AZ QUOTES

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# Worlds’ “Happiest” Country Also Has No Carbon Emissions

October 2020  
(originally published March 2018)



Fir trees create a dense cover in this Bhutan forest. Bhutan’s constitution guarantees that 60 percent of the country’s forests will remain protected.

The small kingdom of Bhutan could be a model for countries on the front lines of climate change.

Bhutan is one of the world’s remaining biodiversity hotspots. Approximately 72% of Bhutan is covered by forests. Government mandate that 60% will be protected for all time.

Bhutan not only carbon neutral, but also a **carbon “sink”**, through its abundant forests absorbing more carbon from the air than released.

**Gross National Happiness Index** ~ socioeconomic index (social thermometer) to ensure economic development doesn’t “squench” traditional lifestyles + allows for inclusivity



[nationalgeographic.com](https://www.nationalgeographic.com)

[https://www.nationalgeographic.com/photography/proof/2018/march/bhutan-gross-domestic-happiness-sustainability-environment-mountains/?cmpid=org=nop;mc=cm-email;src=nop;cmp=editorial;add=SpecialEdition\\_Escape\\_20201007&rid=DEB35FE319CB57C4A857386A2CBE0D5D](https://www.nationalgeographic.com/photography/proof/2018/march/bhutan-gross-domestic-happiness-sustainability-environment-mountains/?cmpid=org=nop;mc=cm-email;src=nop;cmp=editorial;add=SpecialEdition_Escape_20201007&rid=DEB35FE319CB57C4A857386A2CBE0D5D)

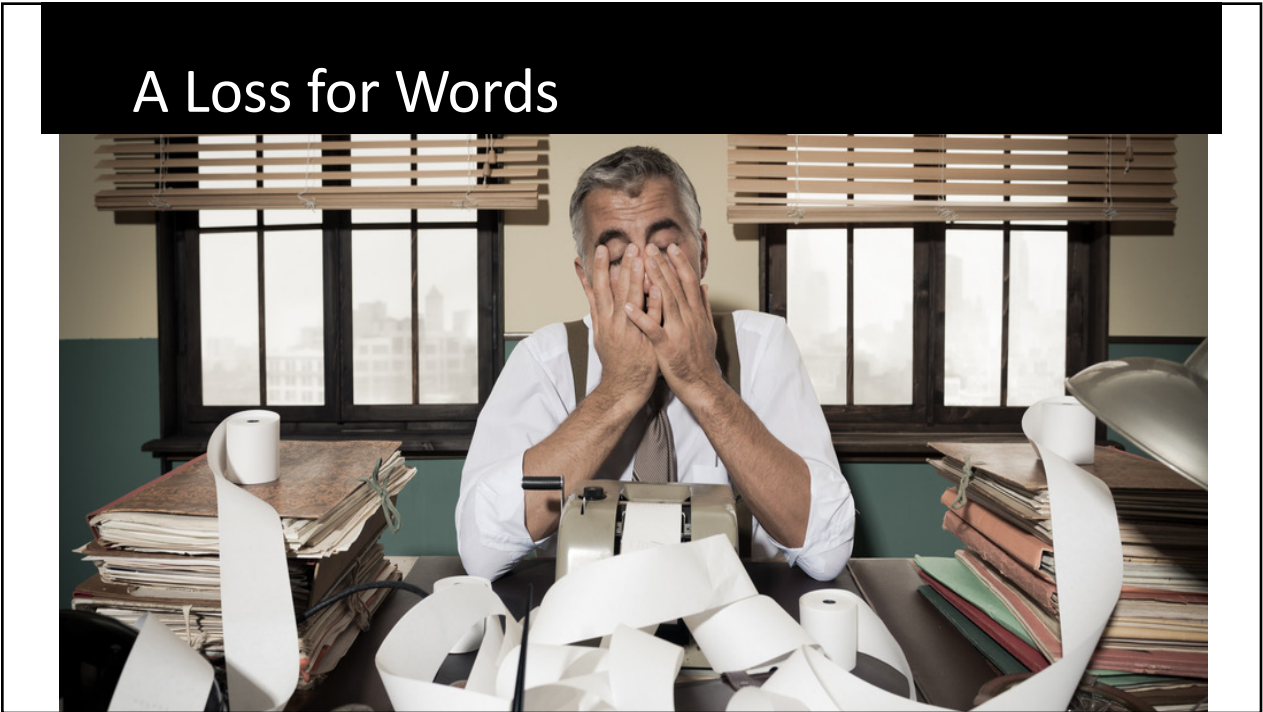


[businessinsider.com](https://www.businessinsider.com)

<https://www.businessinsider.com/bhutan-happiness-technology-2018-8>

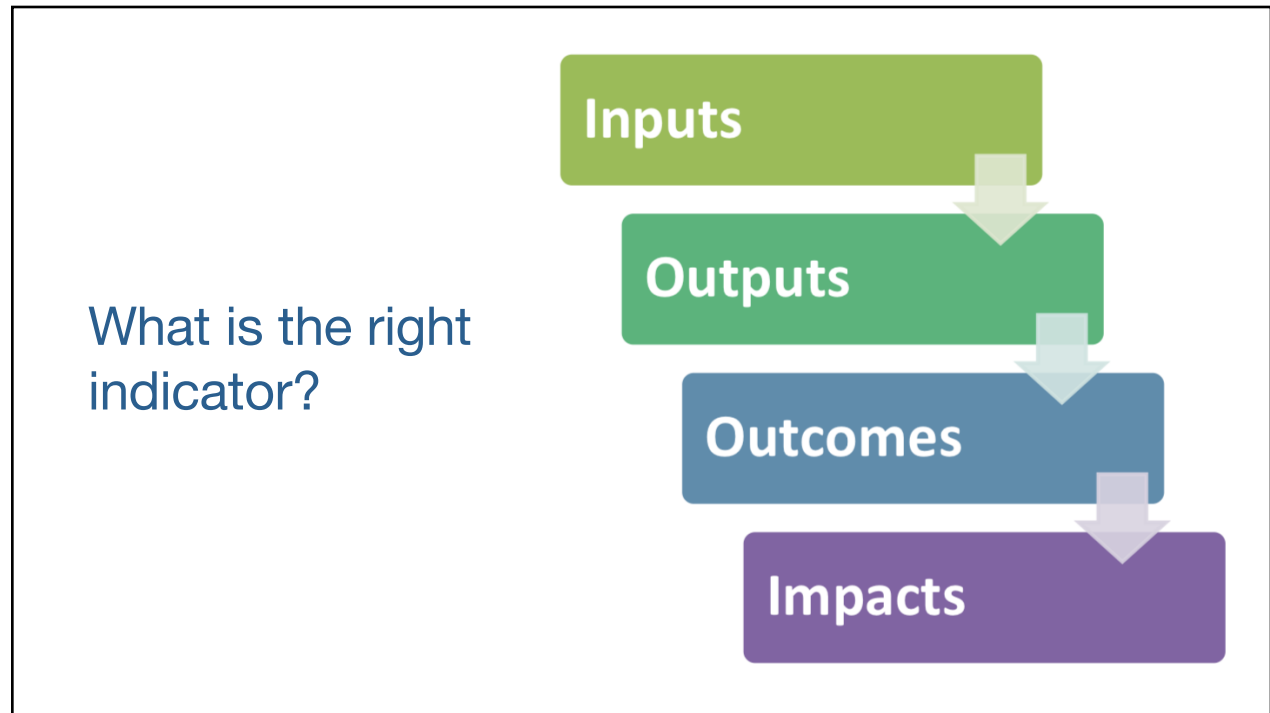
IN THE NEWS

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## Logic Model vs Theory of Change: telling them apart

Adapted from material originally created by:  
Helène Clark, Director, ActKnowledge  
Andrea A. Anderson, Research Associate,  
Aspen Institute Roundtable on Community Change

[https://www.theoryofchange.org/wp-content/uploads/toco\\_library/pdf/TOCs\\_and\\_Logic\\_Models\\_forAEA.pdf](https://www.theoryofchange.org/wp-content/uploads/toco_library/pdf/TOCs_and_Logic_Models_forAEA.pdf)

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## Logic Model vs Theory of Change:

- Terms are often used interchangeably
- Funders, and increasingly, investors demand one or the other
- Both can improve business model design (but in different ways)
- Both are foundational concepts for ALL the measurement methods and systems of indicators referenced in the readings (IRIS, GRI, SROI, DV, etc.)

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## Logic Model vs Theory of Change:

**Logic Model**

**Theory of Change**

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## Logic Model vs Theory of Change:

### Logic Model

### Theory of Change

Inputs	Activities	Outputs	Intermediate Outcomes	Long-term Outcomes

*Basic United Way format, 1996*

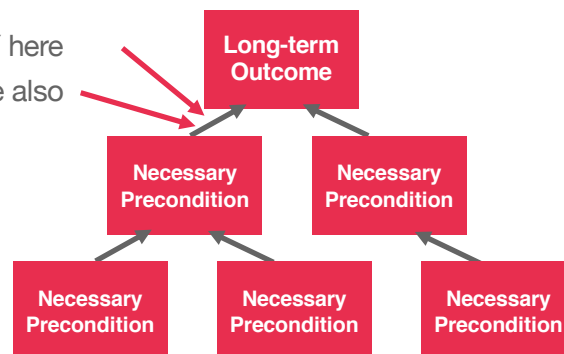
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## Logic Model vs Theory of Change:

### Logic Model

### Theory of Change

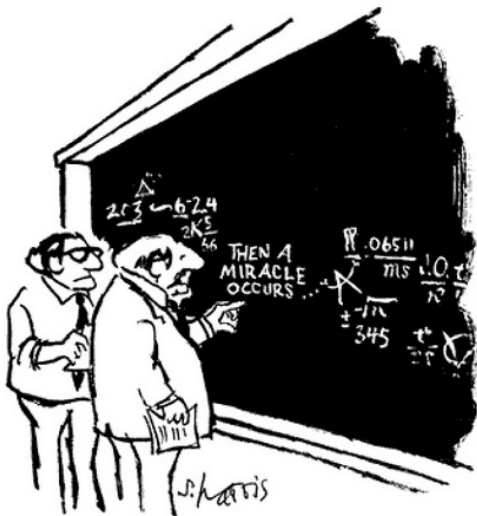
Explain WHY here  
Show activities here also



All outcomes that must be achieved BEFORE long-term

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## What is Theory of Change?



"I think you should be more explicit here in step two."

Essentially comprehensive description and illustration of how and why a desired change is expected to happen in a particular context.

source: theoryofchange.org

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## Logic Model vs Theory of Change:

### Logic Model

- **Starts with program** & shows components
- Shows inputs, activities, & outputs but **not WHY** outcomes are expected
- Doesn't always identify required indicators or evidence
- **A bit like business model generation**

### Theory of Change

- **Starts with goal**; determines programs needed
- Requires justification at each step
- Indicators or evidence are required ~ causal model
- Links outcomes + activities to explain **HOW and WHY** the desired change is expected to come about
- **A bit like 'question zero' and critical analysis**

**Why is this important?**

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You need to know HOW WELL a precondition needs to be met in order to get to the next goal.

**What does that mean?**

example:

*How often do students need to attend an after-school program in order for their reading tests scores to improve?*

Inputs	Activities	Outputs	Intermediate Outcomes	Long-term Outcomes
Teachers Students Books	After school reading program	Books are read	Continued attendance at after school program	Improved reading test scores

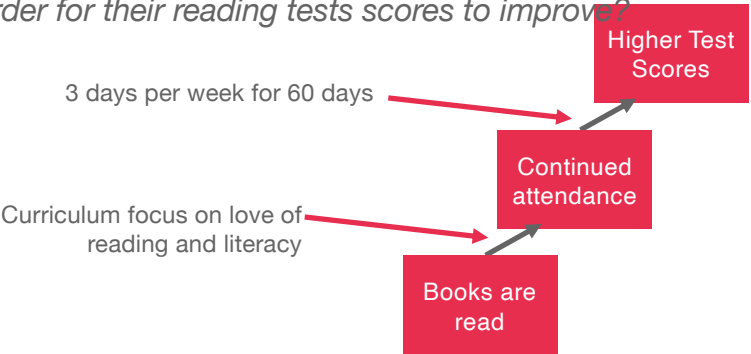
31

You need to know HOW WELL a precondition needs to be met in order to get to the next goal.

**What does that mean?**

example:

*How often do students need to attend an after-school program in order for their reading tests scores to improve?*



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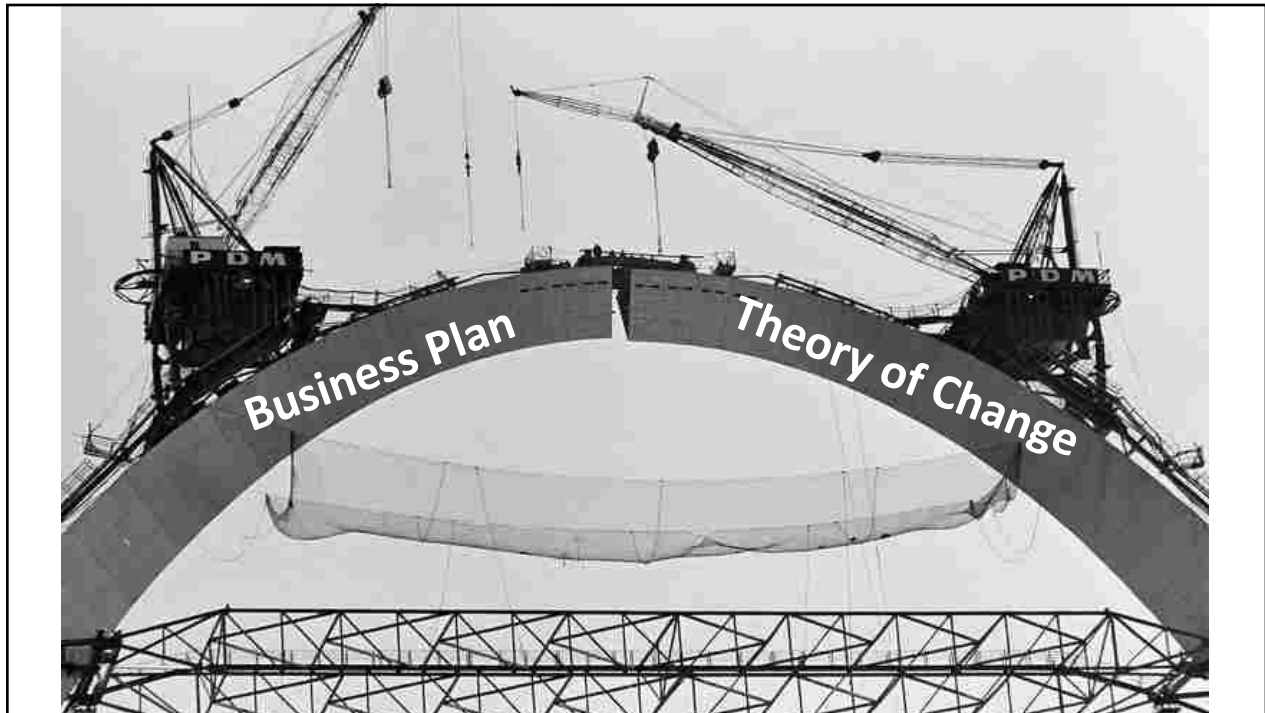
### Sample Logic Model: Social Enterprise School for Non-Profit Organizations

Resources/Inputs	Activities	Outputs	Short-term Outcomes (up to 6 mo. after activity begins)	Longer-term Outcomes (6-12 mo. after activity begins)	Impact (1 year and beyond)
Funding	Workshop on Business Options, Environmental Scanning and Stakeholder involvement	Number of and type of workshops attended for all team members	Increase in knowledge of business practices	Successful launch of SE venture	Increase in in earned income revenue
Curriculum & Materials			Increase in awareness of organizations' core competencies	Maintain support from peers	Diversification of revenue sources
Facilities & Equipment	Workshop on Exploring Ideas related to Core Competencies	Number of and type of completed assignments between workshops	Increase in skills in feasibility market research	Increase in perceived support of SE across within organization	Application of social enterprise process to future ventures
Expert trainers and coaches	Workshop on Feasibility Research	Development of Business Advisory Committee within organization	Increase in business plan development skills	Application of SE development process to future ventures	Adequate resources allocated to all social enterprise ventures
Volunteers	Workshop on Business Plan Development		Increase in access to resources, support, and start-up funding		Value & support for social enterprise ventures throughout organization
Guest speakers	Workshop on Refining Plan & Creating the Pitch		Increase in self-efficacy of team members		Greater organizational sustainability
Administrative Support			Improved attitude among team members about SE		Team/organizational capacity for SE ventures
Strategic partners					
Marketing & Recruitment materials					
Eligible & committed participants					

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## Logic Model vs Theory of Change:

### Logic Model

- Representation
- List of components
- Descriptive

### Theory of Change

- Critical thinking
- Pathway of change
- Explanatory

**Summary**

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# Success Factors

*A 2011 review of 33 social enterprises at Vancity Community Foundation showed these success factors:*

- Distinct transition from operating like a non-profit to **operating like a business**
- Offered an **appealing product or service**
- Had **strong management skills and experience**
- Had **strong support networks**
- Had **good planning + evaluation systems**
- **Decisively made changes when necessary**

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## Two Lenses (Demonstrating Value)

What information is useful?



How will the information be used?



[demonstratingvalue.org](http://demonstratingvalue.org)

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## Evaluation ROI (Demonstrating Value)

		Ease of Collection		
		Difficult	Medium	Easy
Importance of Information	High	Consider an alternative?	Worth the effort	Definitely!
	Medium	Probably not worth it	Only if you have time	Worth the effort
	Low	Ignore	Probably not worth it	Probably not worth it

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## Skoll's “-ize” Tips

1. **Contextualize:** how do metrics connect with organization's core strategy?
2. **Prioritize:** focus on meaningful measures
3. **Capitalize:** focus on outcomes and indicators that are critical to the organization's work
4. **Right size:** tailor depth of metrics to the audience
5. **Systematize:** monitoring and evaluating should be part of everyday metrics (dashboard)

<http://skoll.org/2015/07/28/prioritize-capitalize-right-size-and-more-5-insights-from-the-skoll-foundation-on-monitoring-and-evaluation/>

source: Kassab, 2015

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## Common Pitfalls to Avoid

- Counting what's easy, not what's important
- Ignoring ecosystem services
- Valuing ecosystem services as short-term commodities
- Subjective interpretation (e.g. confirmation bias)
- Mis-categorization
- Averages, estimates vs. actual, appropriate data
- Overlooking nonlinearities, externalities
- Denying complexity of systems
- Forgoing the why for the what
- Tying correlation with causation
- Missing unintended consequences

**But #1 is taking on too many indicators**

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## Social Impact Capability Framework



Examining these seven capability areas can help organizations determine their readiness for creating impact.

source: Fuzi, Gryszkiewicz, Sikora SSIR 2018

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# Measuring Cure2Children's Impact

Accountable to whom?

What indicators?

Over what timeframe?

Inputs, outputs, outcomes, impact?



<http://www.cure2children.org>

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## Assignment 2: SELECTED CASE STUDY + TEAM PRESENTATION

The purpose of this assignment is to allow students to learn about initiatives that social entrepreneurs have developed and implemented to address identified systemic issues and gaps. By researching and understanding best practices and "failures", students gain an understanding of the challenges and successes that social entrepreneurs experience along their journey creating social ventures.

This is a team assignment. After forming diverse groups of five (5), students will explore strategies that have been utilized to address a specific Social Problem. This specific Social Problem may have been one that was identified by a student (or students) in Assignment 1 (Social Problem Situational Analysis) or may be an entirely different problem.

Once the team has agreed on a Social Problem (which may include environmental, economic and/or social aspects), the next step is to research how social entrepreneurs have responded to fill the gaps. Of course, not all of the enterprises will be successful. Remember, we often learn more from strategies that may not have worked as originally anticipated. Selected Case(s) may be local, national or global.

Elements of the Case Study may include, however are not limited to, the following:

- **Problem/Issue** ~ Brief description of the social problem that the initiative is attempting to "solve" or address. It is important that the reader/audience has a clear understanding of why this is a problem. Be sure to include details of the context (region affected, underserved communities, etc.). If possible, speak to the larger system in which this problem is situated.
- **Social Enterprise** ~ Include a description of the social enterprise. (You may find the nine categories of the Business Model Canvas may provide a useful guideline. However, you are not limited to this format.) Describe how the venture attempts to address or "solve" the identified root problems and related issues. Pay particular attention to how the social entrepreneur(s) have responded to the gaps in the system they have determined. How did they hope to create a positive impact on the system? For whom were they designing their initiatives and who did they leave out?
- **Outcomes** ~ Describe the status and outcomes of the initiative - would you describe it as successful or not and why? Whether successful or not, what are some of the challenges that were faced. Is the enterprise still active? Has it scaled? If not, try to determine why the venture was not successful.
- **Key Learnings** ~ What are the key learnings and takeaways from this Case?
- **Future Iterations** ~ If your team were to attempt to redesign the selected social enterprise (whether currently successful or not), how might you do this?
- **Resources** ~ References must be clearly indicated for all sources used. Use of graphics and images to support your findings is encouraged.

**PLEASE NOTE:** This is a team assignment and represents 15% of the final grade.

### DELIVERABLES:

1. **Team Written Submission** ~ The written piece should be about four (4) pages and support the team presentation and slides. References and supporting appendices (if required) are in addition. Clear structure, communication and grammar are essential.
2. **Team Presentations + Slides** ~ In-class presentations should be designed to be ten (10) minutes and include all team members.

### DEADLINES:

1. **Team Written Submission + Presentation Slides** ~ Due 11:55pm Sunday October 22, via Canvas.
2. **Team Presentations** ~ Presented in class Mon Oct 23, Wed Oct 25, and Mon Oct 30 2023.

- f -

## Assignment 2

# Selected Case Study

Due Sunday October 22

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**01** Opioid Crisis

**05** Homelessness / Housing Crisis

**02** Opioid Crisis

**06** Homelessness / Housing Crisis

**03** Climate Change / Injustice

**07** Environmental Impacts of Fast Fashion

**04** Food Waste / Insecurity

**08** Environmental Impacts of Fast Fashion

## A2 SELECTED CASE STUDY TOPICS

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**01** Ioano, Isaiah, Mate, Olivia, William

**05** Paahul, Riya, Touseha, Riya, Zuhayr

**02** Amber, Emma, Jas, Julia, Tavish

**06** Jaryd, Jasleen, Jonathan, Shaurya, Ziyaan

**03** Alexi, Hana, Julian, Pam, Surucha

**07** Jose, Lauren, Mary-Joy, Natalie, Sarah

**04** Alma, Lavanya, Mackenzie, Ramy, Samar

**08** Carson, Cesar, Erica, Huihui, Kyra

## TEAMS (Assignments 2 + 3)

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		individual / partner	team
prep:	Pre-assessments	10%	
assignment 1:	Social Problem Situational Analysis	20%	
assignment 2:	Selected Case Study + Presentation		15%
assignment 3:	Applied Social Enterprise Project		30%
assignment 4:	Reflection Paper	10%	
Participation*:	Participation + Engagement	15%	
total		55%	45%

ASSESSMENT

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<p>*Participation + Engagement ~ <i>Participation “Portfolio”</i></p> <p>1: in class speaking (synchronous)</p> <p>2: discussion boards (asynchronous) ~ 1 week</p>	
<div>PARTICIPATION</div>	

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		due	present
prep:	Pre-assessments	ongoing	
contribution:	In-class Participation + Engagement	ongoing	
assignment 1:	Social Problem Situational Analysis	oct 3	
assignment 2:	Selected Case Study + Presentation	oct 22	oct 23 - nov 1
assignment 3:	Applied Social Enterprise Project	nov 28	nov 29* + dec 4*
assignment 4:	Reflection Paper	dec 8	
note* clients attend			
DATES			

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01

assignment 2 ~ selected case study  
*due October 22*

02

assignment 2 presentations ~ *October 23, 25 + 30*

03

iPeer 1 ~ open on October 30, due November 6

REMINDERS




Image source: imgarcade.com

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