

SKI.F.T. – SKILLS FOR TRANSITION

D 2.2 Report on the Second Transnational Capacity Building Seminar in Bologna, Italy 23rd-24th of April 2024

SMP-COSME-2022-SEE Proposal number: 101126777



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Second Transnational Capacity Building and partners Meeting:

23rd – 24th April 2024, Bologna (Italy)

1. Background and objective of the meeting:

<u>SKI.F.T. project</u> partners, after their first transnational meeting in Copenhagen (December 2023), and the organization of the first transnational online meetings in two parts, implemented the second transnational capacity building meeting in Bologna with the aim of enriching their knowledge and skills in relation to advisory and coaching services, to get a better overview of and insight in existing expertise and tools, to deepen networking with other organisations not participating as consortium partners and to further feed the SKI.F.T. methodology for green transition-related capacity-building of micro and small social economy enterprises.

2. Programme:

Timing	Торіс	Speaker		
9.15 -		<i>lgor Skuk</i> – Demetra Formazione		
9.15 - 9.45	Partners arrival and welcome	<i>Daniele Montroni –</i> Legacoop		
9.45		Emilia-Romagna		
Capacity building - First session		Elena Scanferla – COESI		
9.45 -	Deep dive into advocacy and coaching	Open-Es platform		
11.30	services – further investigation of good	Fabiola di Fazio – DEMETRA		
	practices and exchange among partners.	Synesgy platform		

1st day – 23rd April 2024 – Capacity building activities

		Ulrik Boe Kjeldsen - KOOPERATIONEN Advisory & Coaching Julia Koczanowicz-Chondzyńska - FISE Tools for goal setting - advisory service
11.30 – 11.45	Coffee break	
11.45 - 13.00	<i>Capacity building - Second session</i> Advocacy and coaching services – methodologies compared - peer learning session with subdivision into subgroups.	<i>Laura Zambrini</i> – Demetra Formazione – moderating the session All partners contribute
13.00 – 14.15	Lunch break	
14.15 - 17.30	<i>Capacity building - Third session</i> Learning from the field – Experiences from the cooperative ecosystem on the green transition	Simone Fabbri - Legacoop Bologna – Sustainability report 2023 <i>Giorgio Rosso</i> – La Città Verde – Sustainability for community development <i>Guido Ricci</i> - La Lumaca soc. coop. Sociale – Environmental communication for CSR
17.30 - 18.00	Wrap up on the capacity building activities and evaluation of the learning outcomes of the day.	<i>Laura Zambrini –</i> Demetra Formazione <i>Rosaria Mastrogiacomo –</i> Legacoop Emilia-Romagna

2nd day – 24th April 2024 – Internal project meeting

Timing	Торіс	Speaker		
9.30 -	Welcome and wrap up of the 1 st day - further	<i>Laura Zambrini –</i> Demetra		
10.30	discussion on capacity building activities	Formazione		
10.30 –	First session	Elsa Brander -		
11.30	Project & financial management	Kooperationen		
	Planning of coming activities	All partners		
11.30 –	Coffee break			
11.45	Collee break			
		Elsa Brander -		
11.45 –	Second session	Kooperationen		
13.00	Communication & dissemination	<i>Urzula Fila-Kicman</i> – FISE		
		All partners		
13.00 -	Lunch break			
14.15				

3. Profile of participants

This activity has been addressed to two main targets:

- First, partners' organisations represented by the staff that will directly work with potential beneficiaries of the services provided through the SKI.F.T. project, since they expressed the need to get more into deep on specific topics, such as those presented during the sessions described below. The focus has been given to specific tools to support sustainability assessment, methodological approaches and communication.
- Second target have been some cooperatives that are working or are willing to work on their green transition and that took the opportunity offered by this capacity building activity, on one side to better understand the meaning of a sustainability approach and the elements that have to be taken into consideration to approach this transformation in a proper way, while on the other to exchange views and their specific expertise on the matter of environmental sustainability, by providing presentations of their enterprises and best practices.

4. Description of the capacity building sessions:

The first day – 23rd April - of activities started with the welcoming speeches of Mr. Igor Skuk and Mr. Daniele Montroni, respectively presidents of Demetra Formazione and Legacoop Emilia-Romagna.

Soon after the consortium started the working sessions for capacity building. The agenda was structured to have different moments of mutual learning and capacity building.

Capacity building - First session

The first session has been dedicated to the further investigation of tools and best practices in relation to advisory and coaching services. Laura Zambrini, Demetra Formazione, moderated the session that saw the intervention of some of the consortium representatives:

- A. Elena Scanferla, CSA COESI, presented the <u>OPEN-es platform</u>, an open digital platform for the sustainable development of businesses developed by ENI (Italian national organisation in the sector of energy). This platform, that is under experimentation also by CSA COESI, is used to support enterprises from different sectors and with different dimensions to implement their business following the ESG standards. The platform, available in different languages, allows to evaluate on one side the performance of the enterprise in relation to the 3 pillars of Governance, Social and Environmental strands and at the same time returns a benchmarking on the performance in comparison to other enterprises working in the same sector or with similar characteristics. Additionally, the platform returns a development plan indicating the priority actions to be undertaken by the enterprise to be more compliant with the ESG standards and offers other useful supports such as the collaboration area / community where the enterprise can exchange with other companies and get inspiration and support. After the presentation the attendees asked for some clarification and asked to have an update from COESI once their test on this platform has been concluded.
- B. **Fabiola di Fazio, DEMETRA FORMAZIONE**, presented then the <u>Synesgy platform</u>. Also, this one is a digital platform, born from the alliance between CRIF, CRIBIS and a network of strategic partners worldwide, to collect and manage corporate sustainability

information. Using a questionnaire in line with international standards such as the UN 2030 Agenda, the United Global Compact and the EU Taxonomy, the Synesgy platform enables Corporates, SMEs, Banks and Insurance companies to assess their own sustainability and verify the ESG performance of their customers and suppliers. The process adopted allows to customize the assessment based on the dimensions of the enterprise. For small and micro enterprises in fact the assessment is simplified and composed by 30 questions (+ additional questions for enterprises operating in primary sector of manufacturing) directed to the 3 areas of investigation – environmental, social and governance. Each question is structured according to the Global Reporting Initiative Standard and European Sustainability Reporting Standards. Aside the assessment of the single enterprise, it is also possible to link each enterprise to a leading organisation that can collect all the scores from the different enterprises and at the end obtain the general Synesgy score for the whole group. This solution has been adopted by the representative organisation of cooperatives in the metropolitan area of Bologna and is a good example of common commitment for the sustainability of the system. Later the referee of Legacoop Bologna presented their experience with the platform.

C. **Ulrik Boe Kjeldsen, KOOPERATIONEN**, that presented the process and services developed by the organisation for supporting their enterprises in identifying opportunities and act strategically for the transition. This approach adopted by the organisation is focused on 3 complementary perspectives, that addressed to impact, the one on documentation (measuring and communicating the transition) and the last on business development. Through an accompaniment carried out by the organisation the enterprise will be able to take effective decisions, create their own action plan and design their strategy for transition.

Different discussions have been animated by other partners in relation to the methodological approach and the kind of support envisaged by each of the organisations that will be in charge of the advisory and coaching activities.

D. Julia Koczanowicz-Chondzyńska, FISE, presented "DIY - Development Impact & You" toolkit a collection of tools that can be used to support the ideation process and development of strategic planning. This toolkit will be very useful for the partners that will be in charge of offering advisory and coaching services, adopting a design thinking methodology and approach. In particular, Julia presented the Evidence Planning tool, a quick way to help articulate and improve what you are trying to accomplish. It supports in the definition and sharing of the work performed, and the assumptions and evidence upon which this is based considering also the effect on target beneficiaries, society and other organisations. Furthermore, it has been presented the Thinking Hats methodology, that allows a range of different viewpoints and perspectives to be brought into a discussion, whilst keeping the focus on the issue at hand. These methodologies and tools can be easily adopted by the organisations in charge of advisory and coaching to accompany the enterprise in structuring their own action plan on green transition as a strategical leverage for their competitiveness and impact generation.

Capacity building - Second session

After the break the consortium started to work on the SKIFT Advocacy and coaching services' methodologies with a peer learning technique. In fact, the partners have been divided into 3 sub-groups with 3 main focuses:

GROUP 1	
WHOLE PROCESS ANALYSIS	
What aspects of the methodological approach	
might limit the effectiveness of the SKI.F.T.	Reflect
project's goals, and how could these be	timelir
addressed?	with S
Evaluate the transitions between the various	What
advisory service steps.	enhan
Where do you see potential for streamlining	appro
these transitions to better support SEEs?	How e
	prepa
	transit

GROUP 2 DELIVERY TIMES AND METHODOLOGY

Reflect on the consistency of the delivery timelines of consulting and coaching activities with Skift's objectives. What strategies could be implemented or enhanced to improve the methodological approach? How effectively does the current methodology prepare SEEs for a sustainable green transition? What gaps exist and how might they be filled?

GROUP 3 FOCUS ON TOOLS PRESENTED

What tools might be suitable for SEEs? In what ways could the existing tools be modified to better serve a wider range of SEEs and sectors? What types of additional tools or resources would complement the current offerings and enhance the sustainability outcomes for SEEs?

In the sub-groups participants had the opportunity to exchange more in detail their experiences and to learn from each other on the different methodologies used by their organisations, comparing tools and understanding which are the elements that can guarantee an effective path for micro and small enterprises within the framework of SKIFT project.

Each of the group had a dashboard in which they had to indicate the most important items to retain and to be presented to the entire group in the plenary discussion.

From the different groups emerged as essential elements to be considered in the development of the common SKIFT methodology:

- 1. **Flexibility in the service design**, it will be essential to use the right tool, methodology and time depending on the enterprise involved (maturity in respect to green transition, capacity in investing on it, etc.) and on the local context and needs, for example the different steps imagined that can work for an enterprise, can be revolved for another one;
- 2. **Group activities and networking**, it will be a powerful element for the SKIFT methodology to favour the exchange among different enterprises (per sector, per location, etc.) because it could generate inspiration and the ideation of new products, services or processes contributing to ease the uptake of these enterprises to green transition;
- 3. The **initial assessment is crucial**, so each of the organisations decided that an assessment tool has to be shared and standardised and it should lead to a greater simplification and efficiency of the process for advisory and coaching. This assessment should generate a report/ diagnosis / action plan that can be further re-assessed by the coaches and used as guideline for the services' implementation;
- 4. The process should start with an **awareness generation** in enterprises, since some of them may be quite far from what can be done in terms of green transition.

Capacity building - Third session

The third capacity building session has been designed to learn from practitioners and local enterprises that work in the framework of green transition.

The logic adopted has been that of covering all the target groups of the SKIFT project, namely:

- Support organisations and representatives in the sector of social economy: intervention of Legacoop Bologna;

- Enterprise that is engaged in green transition: La Città Verde social cooperative;
- Provider of services in the green transition: La Lumaca social cooperative.

As mentioned previously, this specific capacity building action had the objective of getting a better overview of and insight in existing expertise and tools, to deepen networking with other organisations not participating as consortium partners and to further feed the SKI.F.T. methodology.

The interventions where the following:

a. **Simone Fabbri, Legacoop Bologna**, that presented the "Cooperative Agenda for Sustainable Development Bologna 2030". As mentioned in the description of the first session, Legacoop Bologna together with SCS Consulting and CRIBIS decided to adopt the Synesgy platform to evaluate the performance of its cooperatives in terms of ESG standards and to elaborate the report presented. This tool, that allowed to have a general overview of the ESG scoring of cooperatives in comparison to other kind of enterprises, has then be integrated with more indicators that can give a better understanding of the values and principles of cooperatives and measure their impact in terms of environmental, social and governance strands.

What has been pointed out by Mr. Fabbri is the need of adapting the tools, especially those designed for enterprises in general, to align them with the principles and values that are specific of social economy enterprises, because otherwise we risk not to correctly evaluate the impact that they generate with their activities, especially in terms of social and sustainability dimensions.

b. Giorgio Rosso, La Città Verde. Mr. Rosso started his intervention by presenting his cooperative, the activities it performs and some essential data. The cooperative is active mainly in "green" sectors, in fact it operates in construction and maintenance of green areas, construction and maintenance of urban furniture, waste collection and treatment, street cleaning and recently they started a social agriculture project. La Città Verde is a large enterprise with 30 years of history, as of now it gathers 162 workers – among them 61 are disadvantaged people. Thanks to the investments realised in the last years they are now able to produce 224 MW/year from renewable energy, but still they face some problems in increasing alternative sources to oil for the use of work vehicles. Soon after he presented some relevant projects that see the cooperative active in the green transition such as LOWaste (funded by LIFE programme) and BuySocCirc (funded by SMP – COSME). He then illustrated some of the critical points encountered during the lifetime of the cooperative since when it was a small enterprise and the solutions that they adopted:

CRITICAL POINTS & SOLUTIONS			
PERSONS			
STRATEGY			
MONEY			
TECHNOLOGY			
	TRAINING & RECRUITING		
	TIME TO THINK		
	TRUST AND REPUTATION		
	KNOWLEDGE		

He underlined the kind of skills that for the cooperative have been fundamental for its development and success along the years:

- MANAGING DIVERSITY - SEEKING BALANCE - BUILDING CONNECTIONS

All these skills have to take into consideration the 3 dimensions of sustainability – economical, social and natural, were natural means environment but at the same time the culture of nature preservation

that each of us should possess.

- Guido Ricci, La Lumaca. Mr. Ricci started with a presentation of his cooperative, born in 1979 c. with the mission of promoting a responsible attitude towards the environment and future generations in society, to contribute to the diffusion of the culture of sustainable development with education, information and involvement. In its history the cooperative adopted different approaches in developing its services, always in line with national, European and international strategies linked to sustainability and sustainable development. They have a dedicated are for education over sustainability matter called EDUCO, with a strong outreach in schools - 70,000 students every year are educated to environmental issues and sustainability culture. Furthermore, they implement around 150 environmental communication and information campaigns involving over 500,000 people. Then he focused on 2 core activities performed by the cooperative: Green Marketing, actions to increase business profitability in the short and medium term; Corporate Social Responsibility - CSR, bringing sustainability within the company to increase its value in the long term. In the framework of CSR, the cooperative has a long experience in supporting companies in communicating their efforts toward environmental sustainability and he presented some very interesting examples of communication activities performed. He underlined the importance of communicating the enterprise sustainability for different reasons:
 - A legal obligation for some, an opportunity for all \rightarrow Trust relationships.
 - Credit lines \rightarrow easier access to credit.
 - Financial operators/investors reward sustainable companies → +attractive +worthy of investment.
 - Market: large retail chains require ESG data→ Export/Consumers/reputation
 - Calls: rewards for accessing resources \rightarrow PSR, PNRR, CCIAA.
 - Awareness of one's impacts: knowing oneself better and investing in cost reduction
 → Benchmarking.

Results of the evaluation questionnaire over the capacity building sessions

Among the different sessions organised, participants rated the **first session as the most effective** in terms of knowledge and abilities acquisition.



Participants in fact stated that this session allowed them to get inspiration and opportunity to discuss on how to adjust the large ESG/CSRD reporting framework to make it useful and relevant for small/micro enterprises as a tool for making strategic decisions in the green

transition. In particular, the tools presented, Open-ES and Synesgy, raised great attention and the possibility to deepen their knowledge considering both advantages and disadvantages was an added value. The session also allowed the exchange of ideas, potential and possible solutions how to approach advisory and coaching services, the 2 methodologies presented are relevant for the target group addressed by the project.

Both tools and methodologies presented allowed the participants to acquire competences and knowledge relevant for their work within the project (advisory and coaching) but also for their everyday work with SEEs, so expanding the impact of this session not just linked to project target group, but widening the potential audience (i.e., medium and large SEEs).

The **second session** has been evaluated as effective by all participants, in particular they stated that it contributed to increase their consciousness in relation to the need of being flexible in the sequencing the advisory service to make it relevant for different users/companies, taking into account also potential and challenges in different national contexts.

In the group work participants highlighted aspect of methodology to be improved and limitations identified to be tackled in the process. They reasoned on the real importance to meet with expectations and take into account different level of organisation. The second session certainly served to materialize, in small groups, some important points of the project. In terms of skills and knowledge, some of the participants stated that they would bring home even more the awareness that working as a team always leads to great results.

In general, through this session's methodology participants learned that working groups are really effective if you need to process and discuss large batch of information, it helped them learning to analyse the scope from different perspectives. These group works also supported participants to bring to light that the knowledges within the consortium can be an important resource to be exploited during the services' delivery.

Concerning the **third session**, that proved to be effective in relation to the support to participants in delivering services at local level, the participants returned the following considerations on their increased knowledge and skills:

- Thanks to the experience of La Città Verde, participants could understand the model of management and what's important in running the cooperative business model and what to keep in mind when running it in regard to the stakeholders and sustainability of the business activity when faced with transition of different kinds.
- The services provided by La Lumaca and examples of sustainability communication generated great interest and participants wish to further dive on means to link for example communication on social AND environmental impact.
- Thanks to the intervention of Legacoop Bologna, participants had the opportunity to learn how to bond SDG and local strategy in one document and how to present or measure the impact of SEEs on local community.

More in general, engaging with professionals and experts in the field opens doors to networking opportunities. Building relationships with others allows for ongoing collaboration, support, and knowledge-sharing beyond the current session. Furthermore, participants became aware of the fact that in terms of sustainability a lot has been done and a lot more can be done. Companies, like workers, must be accompanied on this path and participants, as entities supporting SEEs, have the opportunity to be the main companions by promoting different methods and forms.

One certainly relevant aspect that emerged from all three experiences presented is the concept that when dealing with sustainability, one cannot reason in compartments but must adopt a holistic approach that embraces all functions of the company and the community in which it operates. At the same time, it is crucial to act on the cultural aspect of micro-enterprises (sustainability culture) approaching them in a clear and rational manner to help them achieve concrete results.

As a **general evaluation of the capacity building activities** carried out, participants stated the lessons learned and what they will build on for their future activities:

- Better understanding on how to use already existing tools to adapt them to the specificity of SE SMEs, together with a deeper view over specific competences needed to implement advisory and coaching services effective for the beneficiaries.
- Interesting tools to assess "green performance" or SEE's readiness to perform it. The power of networking.
- Learned on the importance of sustainable development goals as a part in the business models of SEEs, on management of a cooperative enterprise and strategic approach to running this business as well as initiatives that support green solutions that can go beyond Social Economy and can cooperate with other businesses in order to reach out to the wider general public.
- Identify new tools and approaches to be implemented in the advisory and coaching activities.
- Learned what to question about and how to communicate SEEs development in the green transition field.
- Understood that working together in groups helps connections and ideas, and learning from an actual experience is very helpful for thinking about a good methodology.
- This activity has reinforced the importance of continuous learning and improvement. Staying abreast of emerging trends, best practices, and innovations is essential for remaining effective and relevant in supporting our project.

All PowerPoint presentations can be found here below.



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ASSESSING SUSTAINABILITY and REPORTING

SKI.F.T. SKILLS FOR TRANSITION INCREASING THE IMPACT OF SMALL SOCIAL ECONOMY ENTERPRISES PROJECT 101126777

> Bologna, 23 April 2024 Elena Scanferla elena.scanferla@coesi.coop

ECONOMIA SOCIALE SVILUPPO INNOVAZIONE



Funded by the European Union



OPEN PLATFORM

- An open digital platform for the sustainable development of businesses
- Open-es initiated by Eni with the Boston Consulting Group and Google Cloud in 2021, which has been joined, alongside RINA, by important Italian and international companies.



➢ FREE of charge





3 PILLARS of sustainability

Governance

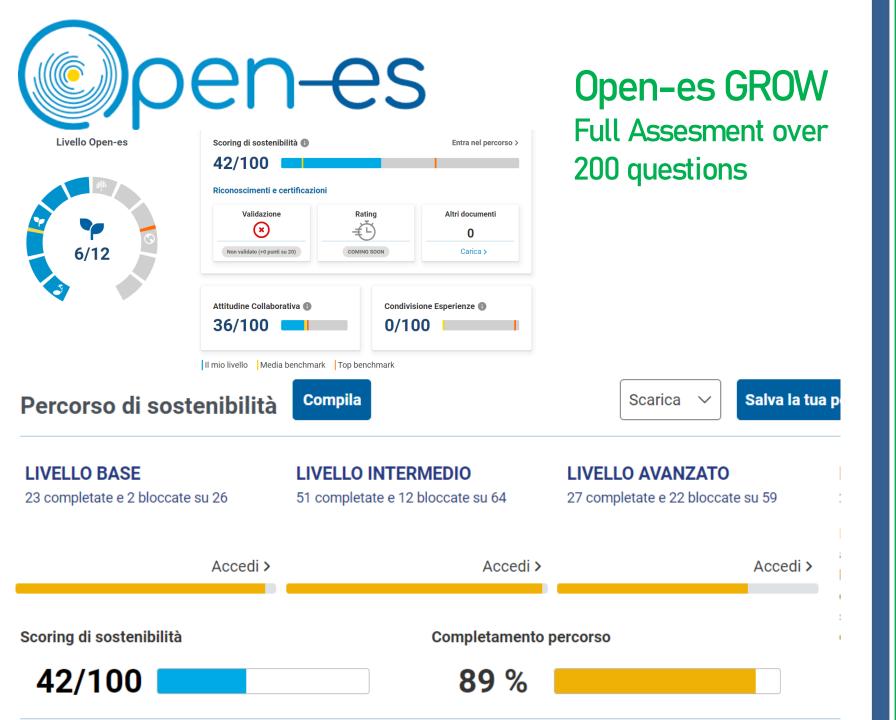
Social

Quality of governance, procedures, representativeness, anticorruption policy, risks management, ethical code. People are at the heart of all organisations, respect health and safety, human rights, providing decent work standards for all women and men, including young people and disabled people , and providing equal pay for work of equal value.

Environment

The environmental impact of a business on water, air quality, biodiversity depends on business activities, production chains, etc. Include community approach.

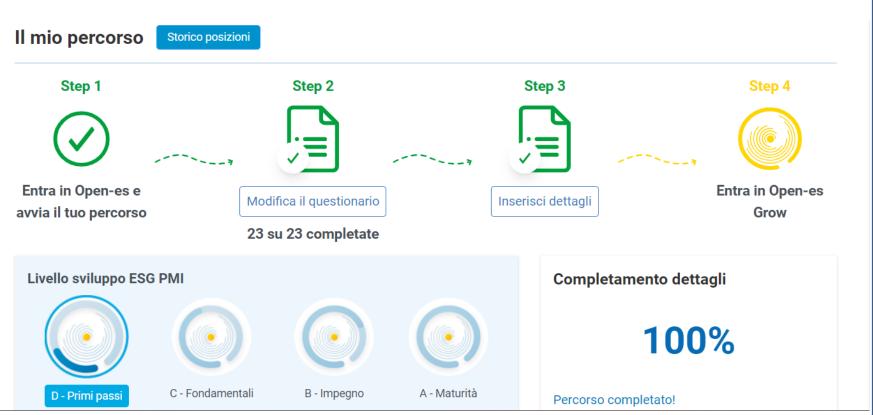






START SMALL

Basic Assesment up to 90 questions





Development plan for transition pathway

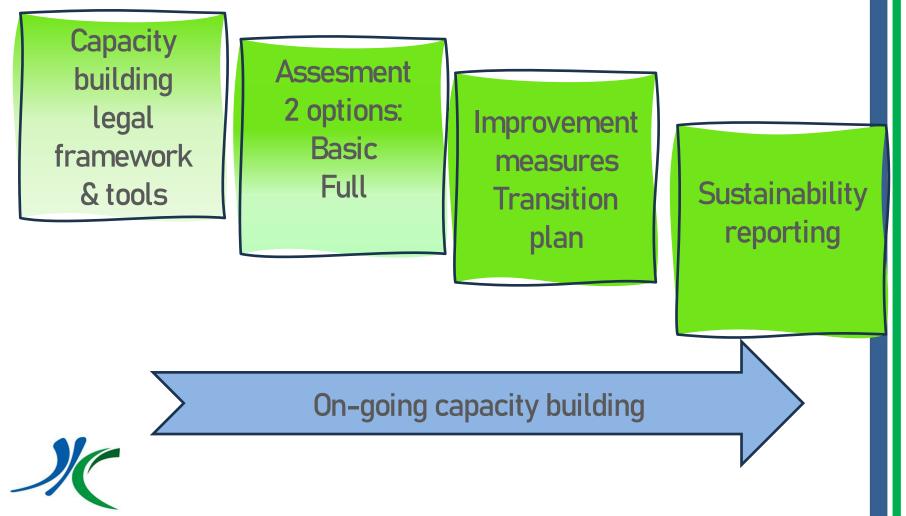
АМВІТО		то	AZIONI PRIORITARIE		
	GENERALE	Validazione	Richiedi la validazione delle tue risposte. In questo modo la tua posizione e punteggio assumerà un valore maggiore e potrai avere un feedback personalizzato utile per il tuo percorso di crescita.		
:	SOCIAL	Salute e sicurezza	Dota la tua azienda di una politica in materia di salute e sicurezza sul lavoro. La predisposizione di un sistema di politiche e di regole di gestione in materia di salute e sicurezza sul lavoro per dipendenti e lavoratori non dipendenti sono requisiti minimi per avere la licenza ad operare.		
;	SOCIAL	Salute e sicurezza	Migliora la trasparenza della tua azienda rendendo pubbliche le informazioni in materia di salute e sicurezza sul lavoro. Un'efficace politica sulla sicurezza sul lavoro segnala un forte impegno della dirigenza e favorire la partecipazione attiva dei dipendenti.		
	SOCIAL	Diversità ed inclusione	Inizia a dotare l'azienda di una politica e/o di regole di gestione delle tematiche della diversità, dell'inclusione, e di pari opportunità. Adottare politiche aziendali incentrate su queste tematiche è essenziale per attrarre e mantenere i talenti. Inoltre, la creazione di una cultura inclusiva, dove tutte le voci sono ascoltate, migliora le prestazioni dei dipendenti e la soddisfazione sul luogo lavoro. L'inclusione gioca pertanto un ruolo strategico: la mancanza di diversità può fungere da ostacolo al miglioramento delle prestazioni aziendali.		
5	GOVERNANCE	Impatti, rischi e opportunità	Inizia a monitorare gli impatti economici indiretti della tua azienda. Molte aziende producono, con le loro attività e prestazioni di beni e servizi, impatti sociali di rilievo, spesso positivi, anche indiretti. L'analisi degli stessi rafforza il posizionamento dell'azienda nella creazione di valore sociale.		
;	ENVIRONMENT	Uso delle risorse ed economia circolare	Definisci una politica aziendale, obiettivi e piani di azione volti ad ottenere obiettivi di economia circolare. L'economia circolare è un modello di produzione e consumo che implica condivisione, prestito, riutilizzo, riparazione, ricondizionamento e riciclo dei materiali e prodotti esistenti il più a lungo possibile.		

- Development plan and priority actions
- > Benchmark
- RINA verifies the information declared
- > Association
- Collaboration area / community



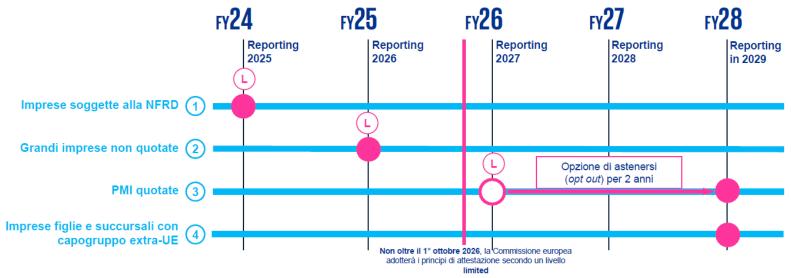
Proposal

A first step to approach and raise the level of awareness on sustainability... support social economy enterprises in designing and implementing a transition plan



L'ambito di applicazione della CSRD

Limited assurance obbligatoria



Reporting FY 2024 - 2028

- Società quotate con oltre 500 dipendenti
- Grandi società non quotate
- PMI quotate
- Società extra-EU con fatturato min di 150 milioni

ATTENZIONE!

Alle PMI delle catene di fornitura potranno essere richieste informazioni sulla loro sostenibilità dalle loro committenti (capo filiera), da valutare richieste Banche ed Appalti







First session Further investigation of good practices and tools

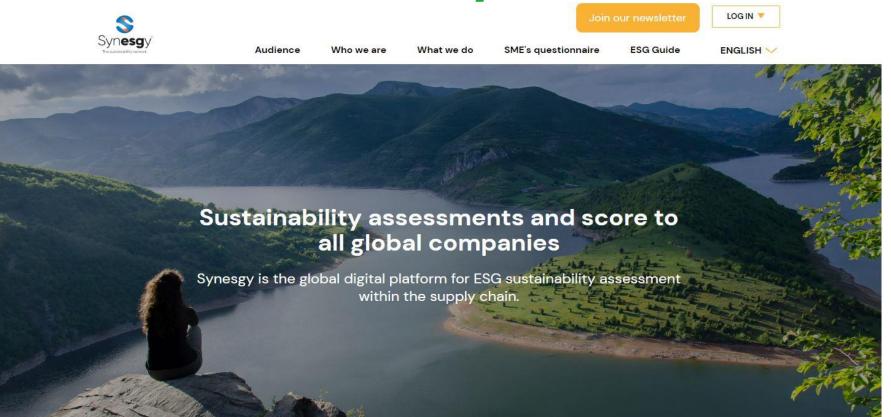
DEMETRA FORMAZIONE 23-04-24





Synesgy The sustainability network





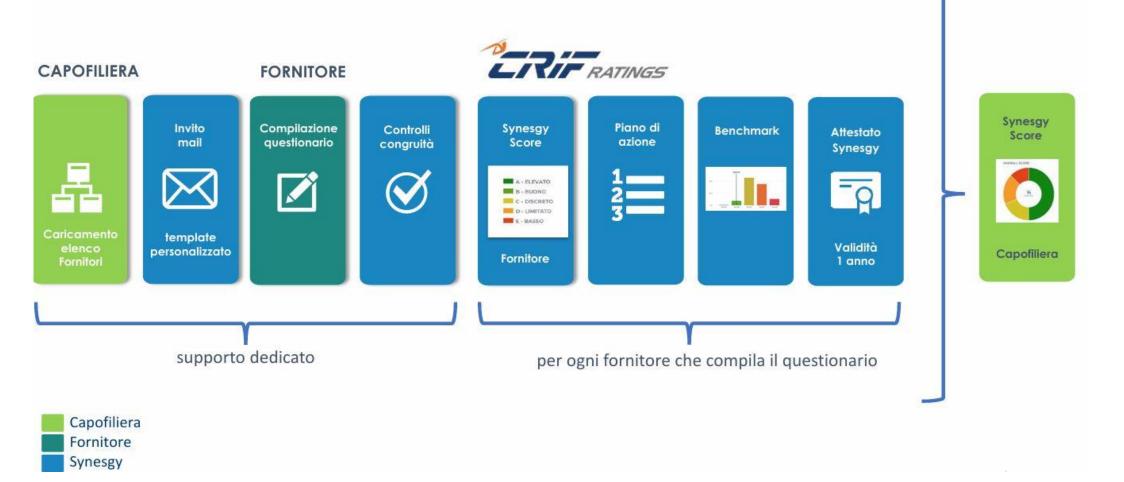
Synesgy is the digital and global platform, born from the alliance between CRIF, CRIBIS and a network of strategic partners worldwide, to collect and manage corporate sustainability information.



Using a questionnaire in line with international standards such as the UN 2030 Agenda, the United Global Compact and the EU Taxonomy, the Synesgy platform enables Corporates, SMEs, Banks and Insurance companies to assess their own sustainability and verify the ESG performance of their customers and suppliers.

The Synesgy process





-02

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Questionario per tre tipologie di aziende

ASVIS

< 50 dipendenti	50-250 dipendenti <50 mil.€ fatturato	> 250 dipendenti o > 50 mil.€ fatturato
 ca. 30 domande + 6 domande dedicate al settore primario (agricoltura/allevame nto) e secondario (manifattura) 3 aree di analisi: Enviromental Social Governance 	identico al primo questionario con l'aggiunta del settore di appartenenza dell'impresa (su 35)	ca. 75 domande 5 aree di analisi: • Business • Enviromental • Social • Governance • Settore
Realizzato da In collaborazione con il	Approvato da:	The assessment questionnaires are tree company and, only for medium and larg

CNA Confederazione Nezionale es Arrigianazo - ado Piccola



The assessment questionnaires are tree, because they consider the size of the company and, only for medium and large companies, also the sector to which they belong.

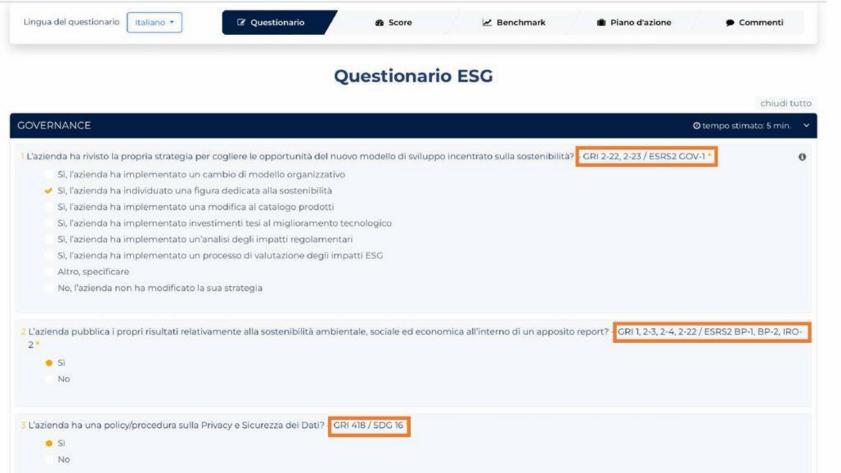
There are three areas investigated for small and medium-sized enterprises: social, environmental and governance.

For large companies, questions have been added that also investigate their specific activity and sector to which they operate.



CRIF RATINGS

Questionario "light" <50 dipendenti o < 10 mio. € fatturato



Each question is structured according to the **G**lobal **R**eporting **I**nitiative Standard and **E**uropean **S**ustainability **R**eporting **S**tandards

Skills tot

SKIF

ansition





The su

About the costs... at least in Italy and for the basic plan of use!

CAPO FILIERA

- visione d'insieme, sempre aggiornata della propria catena di fornitori (download)
- controllo e mitigazione rischi operativi (business continuity e reputazionali)
- omogeneità nella valutazione
- interesse per finanziatori / investitori
- brand reputation



per sempre

FORNITORE

- Synesgy score
- un piano di azione operativo
- benchmarking
- attestato di valutazione
- un processo unico di qualifica ESG
- migliore qualifica nelle gare
- brand reputation







https://www.synesgy.com/en https://www.crif.it/ https://www.cribis.com/en/ Thank you!



Partners





Den Kooperative Arbejdsgiver- og interesseorganisation i Danmark



FISE>





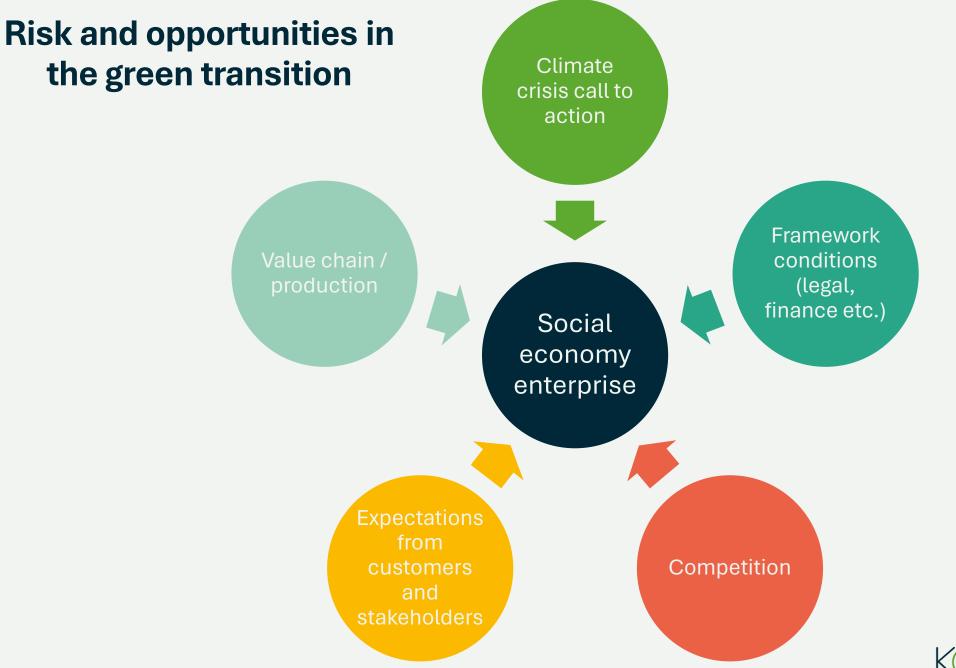




Three strategic perspectives for Making choices in the green transition

A conceptual framework for advisory services in SKIFT?

Impact **Business Documen-**Model tation



KOPERATIONEN

Overall aim

Aim of advisory and coaching activities:

• To help SEEs to identify opportunities and act strategically in the green transition.

This means:

• Identifying, selecting and sequencing specific actions to achieve outcomes (in light of particular circumstances and organisational goals).

Selection should be based on two criteria:

- The potential (positive) climate impact
- The associated positive/negative risks, opportunities and benefits for the organization.



3 complementary strategic perspectives on green transition

Impact perspective

How do we reduce our environmental impact most effeciently?

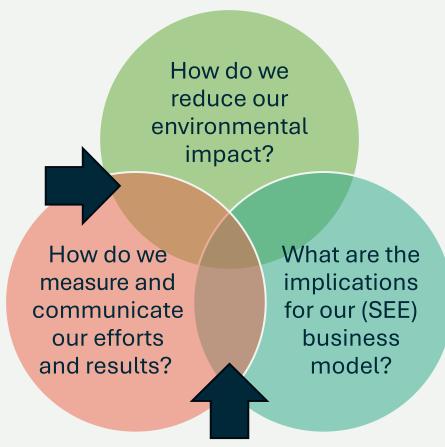
Because reducing environmental footprint is the main aim.

Decision --Action Plan --Strategy



Strategic perspectives on green transition: Documentation and communication

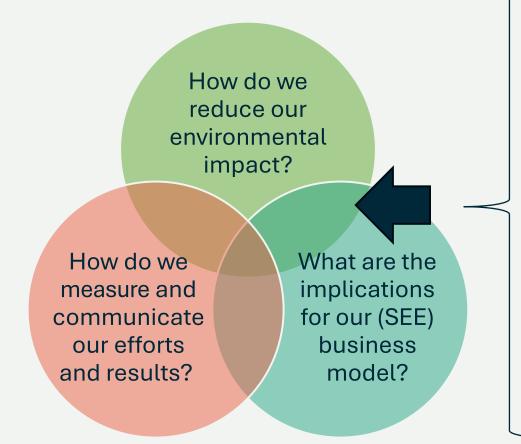
 How can measuring and communicating our efforts and results help to consolidate our work and strengthen our impact?



- How can meassuring and communicating our efforts and results improve our competitiveness? Prevent us from loosing competitivess?
- Which elements are important to document and communicate to sustain our business model /SEE organisational model?



Strategic perspectives on green transition: Social Economy Business Model



- Can reducing environmental impact lead improve the competitiveness of our (SEE) business model? I.E. by reducing costs our improving customer relations?
- Does the green transition developments/activities give need/opportunity to reassess our (SEE) business model?
- Are there elements in our (SEE) business model, which imply special strenghts (or weaknesses) in our ability to reduce environmental impact?

KOPERATIONEN

What does this imply for avisory services and coaching?

Webinars/workshops

- Introducing the 3 perspectives/"methodology"
- One specifically on documentation and communication: "Understand ESG"
- One specifically on Social Economy Business Model

Final Assessment / Action Plan

• Participants shall consider alle three perspectives



	Impact perspective	Documentation perspective	Business Model Perspective
Quality of product/service			
Purchase practice			
Transport			
Energy			
Use of ressources / waste / circular economy			
Etc.			







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Development Impact & You

PRACTICAL TOOLS TO TRIGGER & SUPPORT SOCIAL INNOVATION





PRACTICAL TOOLS TO TRIGGER & SUPPORT SOCIAL INNOVATION

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Exchange

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This is a toolkit on how to invent, adopt or adapt ideas that can deliver better results.

This is a toolkit on how to invent, adopt or adapt ideas that can deliver better results. It's quick to use, simple to apply, and designed to help busy people working in development. It draws on a study of many hundreds of tools currently being used - here we have included only the ones which practitioners found most useful. The tools are not coming out of thin air. Many of them are well documented and have been widely used in other sectors. In that sense this toolkit is standing on the shoulders of giants, and we are happy to acknowledge that. All the tool descriptions include a key reference, so it is easy to trace back their origins and dive deeper into other publications about their application.



I want to....



to understand what I need to do to bring my idea to life INNOVATION FLOWCHART 01

by defining the outcomes from my work EVIDENCE PLANNING 02 \checkmark

develop a clear plan

by evaluating how I am doing and what my options are SWOT ANALYSIS

08

on how to grow my idea into something bigger BUSINESS MODEL CANVAS

for working with other groups that have the same vision as me BUILDING PARTNERSHIPS MAP

06

by improving upon what I've done before

06

5

clarify my priorities

by learning from first hand experiences EXPERIENCE TOUR

07

by focusing on key critical issues PROBLEM DEFINITION

by breaking down a complex issue CAUSES DIAGRAM

09

by defining my goals and the path to reach them **THEORY OF CHANGE**

10



by observing and learning from everyday life **PEOPLE SHADOWING**

in a conversation that uncovers their perspective INTERVIEW GUIDE

by getting to the heart of what motivates people QUESTION LADDER

to ensure my work is relevant to the people I'm working for **STORYWORLD**

14

know the people I'm working with

by clarifying relationships between stakeholders **PEOPLE & CONNECTIONS MAP** 06

by better defining who I am trying to reach TARGET GROUP

by visualising their key characteristics

PERSONAS

00

16

by defining how my offering is new to them **PROMISES & POTENTIAL MAP** 18

generate new ideas

by working together with people who experience and solve problems **CREATIVE WORKSHOP**

19

by thinking differently FAST IDEA GENERATOR 20

by framing a constructive discussion with my team

THINKING HATS 20

by aligning our work based on shared values VALUE MAPPING

00

test & improve

by understanding what is most effective in my work **IMPROVEMENT TRIGGERS**

28

by collecting useful feedback on my work at different phases PROTOTYPE TESTING PLAN 24

by creating an overview of how I engage with my stakeholders EXPERIENCE MAP

26

by crafting a detailed overview of our operations and resources BLUEPRINT

26

sustain & implement

by better engaging people that can benefit from my work MARKETING MIX 00

by executing my plan without being overwhelmed CRITICAL TASKS LIST 28

by launching or growing what I do **BUSINESS PLAN** 29

while exploring different ways of increasing the scale of my work SCALING PLAN 30



I want to look ahead to understand what I need to do to bring my idea to life

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INNOVATION FLOWCHART

LEVEL OF INVOLVEMENT

INSPIRED BY Nesta (2013) Innovation Flowchart.

> MORE COMPLEX TOOL that should ideally be done over a few days. Given the strategic nature of the inputs/outputs, this needs consultations with seniors, peers and ideally needs to be revised after a first pass.

What is it & why should I do it?

The **Innovation Flowchart** gives a detailed overview of the various stages in an innovation process, listing the activities, requirements and goals of each stage. These include an overview of the different people, skills, activities and finances that a project or an organisation might need in order to succeed. The structured overview this tool provides, helps review where you are in the process, and to organise the next steps in your work.

This tool helps you to spot opportunities for growth by helping you understand which resources to focus on. You can see this by checking where you are in the process and whether you have thought of all the aspects that need consideration.

PHOW TO USE IT

The worksheet gives an overview of the various stages in an innovation process, and it lists stage by stage the activities, requirements and goals of each stage. Use this overview to check where you are in the process, and whether you have thought of all the aspects that need consideration. This check may help you to identify what things need special attention. The overview comes with a handy reference to the tools and activities that can support you in each stage.

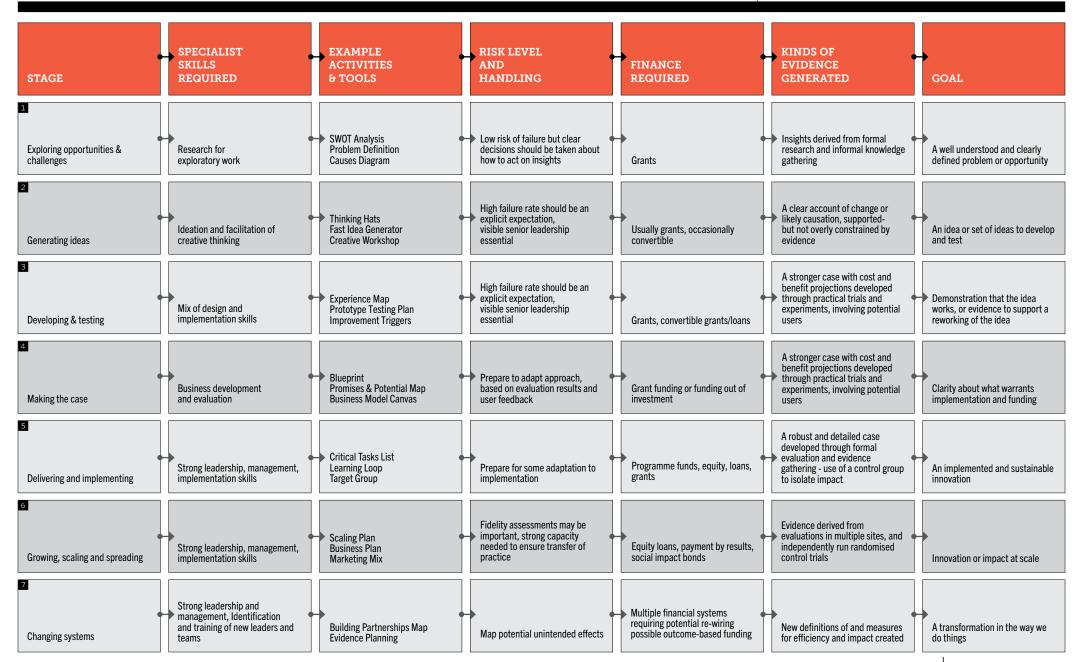
STAGE	SPECIALIST SKILLS REQUIRED	EXAMPLE ↔ ACTIVITIES & TOOLS	RISK LEVEL ↔ AND HANDLING	→ FINANCE REQUIRED	KINDS OF ↔ EVIDENCE GENERATED	→GOAL
1 Exploring opportunities & challenges	•	•	•->	•	•	•
2 Generating ideas	•	•		->	•	•
3 Developing & testing	•	•			•	•
4 Making the case	•	•			•	•
5 Delivering and implementing	•	•		->	•	•
6 Growing, scaling and spreading	•	•	•	•	•	•
7 Changing systems	•	•			•	•



I want to look ahead

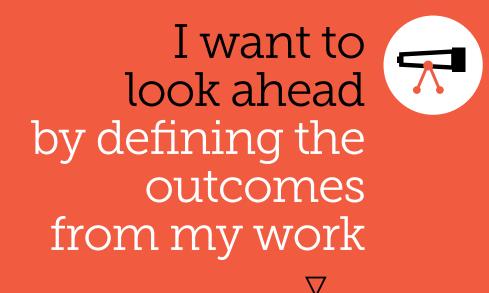
to understand what I need to do to bring my idea to life





Development Impact & You





EVIDENCE PLANNING LEVEL OF INVOLVEMENT

INSPIRED BY

Nesta (2009) Worksheet 2b: Evidence Modelling. In: Creative Enterprise Toolkit.

REQUIRES SOME DIALOGUE with colleagues/ peers. Plan for some time to interact and fill out in collaboration over a day maybe.

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(C)



What is it & why should I do it?

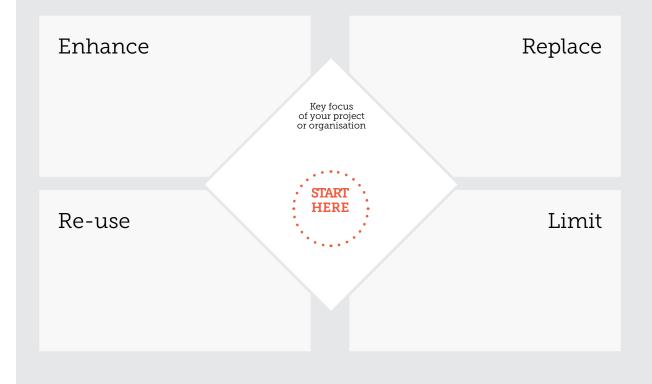
Why do you do what you do? The **Evidence Planning** tool is a quick way to help articulate and improve what you are trying to accomplish. It gives you an easy way to define and share what you're trying to do, and the assumptions and evidence upon which this is based. By making you think more broadly about your work's effect on target beneficiaries, society and other organisations, Evidence Planning helps you construct an evidencebased case for the impact you want to have.

The Evidence Planning tool provides a structured way to project the effects of your activities onto the future. This will help you reflect on what you may want to change or retain. This tool also helps to highlight at an early stage any potential problems or easy to make mistakes.

PHOW TO USE IT

Start by filling out the key focus for your work or organisation in the middle of the worksheet. Then use the questions in the four quadrants to reflect on what your key focus enhances, replaces or even limits. Think of changes that your work would make in the sector, on other public and private bodies, as well as the effect it would have on society. This offers you a window to consider the impact your work may have. Look at the key aspects from diverse points of view. While filling out the four quadrants think of :

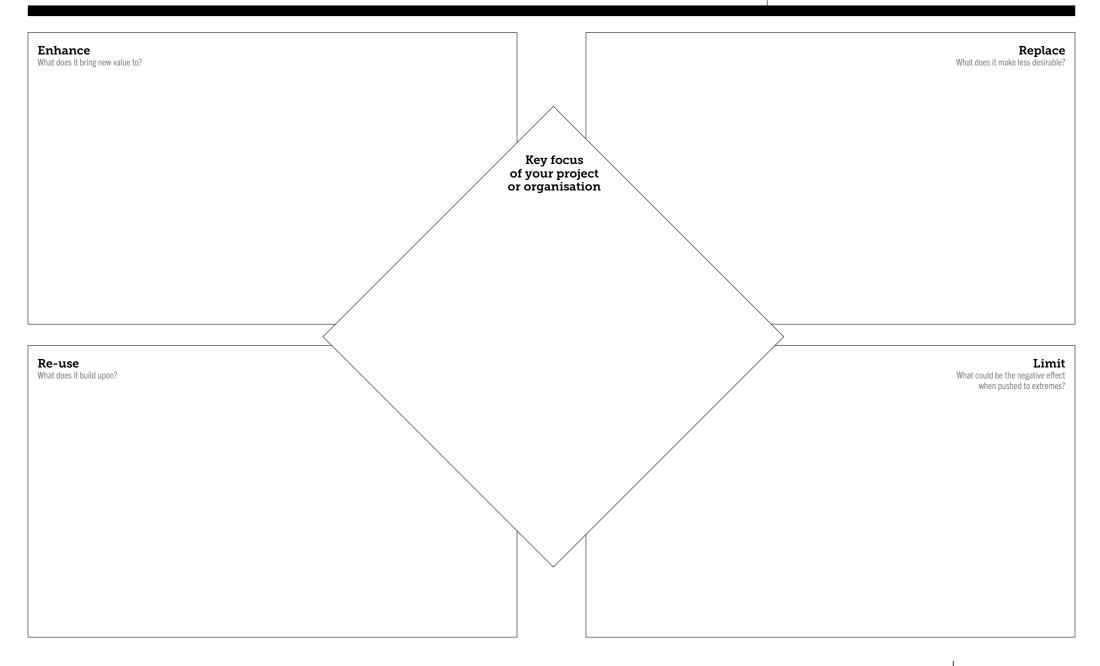
- The wider world. (Think as big as possible.)
- Your particular field or area of interest. (eg. How it might impact current practices)
- Your beneficiaries (What benefits will it bring them?)
- Yourself (What impact could it have on your work/life?)





I want to look ahead by defining the outcomes from my work

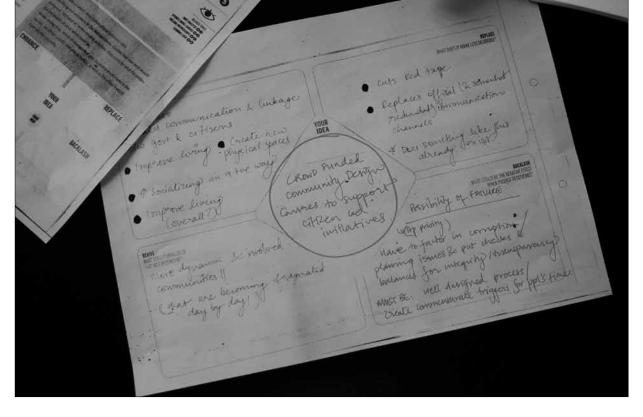
EVIDENCE PLANNING





TOOL USED: EVIDENCE PLANNING ORGANISATION: UNDP KOSOVO COUNTRY: KOSOVO SECTOR: LOCAL GOVERNANCE ROLE: PROJECT MANAGER, SOCIAL MEDIA FOR INNOVATIVE LOCAL EMPOWERMENT CONTACT PERSON: LEJLA SADIKU EMAIL: LEJLA.SADIKU@UNDP.ORG FURTHER INFORMATION: HTTP://UNDP.AKVOAPP.ORG/FR/PROJECT/1338/





KEY OUTCOMES FROM THE EVIDENCE PLANNING WORKSHOP WITH DESIGN AND ARCHITECTURE STUDENTS.

THIS SYSTEM WOULD INVOLVE:

- Citizen body proposals for community development being registered on a central crowd-funding site.
- Mobilising architecture and design students with members of the municipality government to design a product or solution in partnership, post funding.



WHY WE USED THE TOOL:

This project is currently at an early concept stage and we are trying to recruit members of our target audience. We wanted to stretch our thinking to look at and test our idea from a different perspective.

HOW WE USED THE TOOL:

We presented the project and its objectives to a group of 60-70 people at the Department for Design, Public University in Pristina. It was a big group and we wanted to capture as much feedback as possible. The students that attended the workshop deliberated what this project could mean for their local community and we were able to get some really important inputs from our key stakeholders. It helped us identify triggers for ensuring engagement with different community members (for example art students are more interested in projects related to aesthetics).

It emphasised the need for a well designed process for engagement. This is extremely crucial when you are asking people to spare pro-bono time and effort.

RESULTS OF USING THE TOOL:

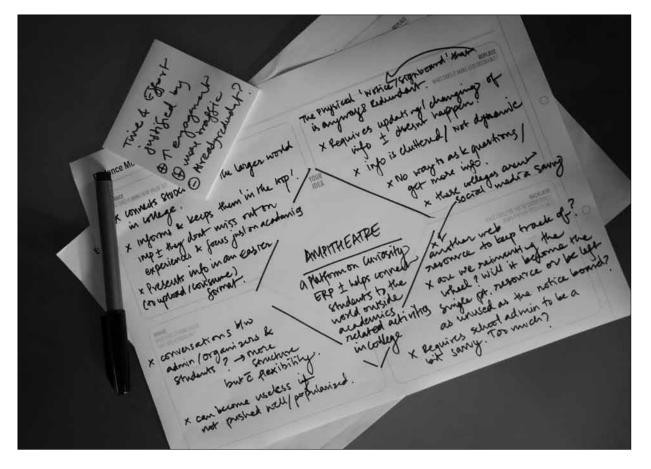
Thanks to this activity, our team has initiated significant momentum for the project. This exercise was very useful in two aspects:

CASE STUDY

- It helped us identify triggers for ensuring engagement with different community members (for example art students are more interested in projects related to aesthetics).
- It emphasised the need for a well designed process for engagement. This is extremely crucial when you are asking people to spare pro-bono time and effort.



TOOL USED: EVIDENCE PLANNING, PROBLEM DEFINITION ORGANISATION: TEEMAC COUNTRY: INDIA SECTOR: EDUCATION ROLE: DIRECTOR CONTACT PERSON: TARUN MARKOSE EMAIL: TARUNMARKOSE@GMAIL.COM



A PICTURE OF THE WORKSHEET THAT CULMINATED OUT OF THE TEAM DISCUSSION

Teemac works with educational institutions creating products to help them modernise practices through an enterprise resource planning (ERP) platform called Curiosity, that we've developed in collaboration with pioneering educators.

We are currently working on a feature called Amphitheater which connects college students to extra curricular activities and events happening in their college.

Right now most of the institutions we work with have an age-old bulletin board with ad-hoc, outdated information and no one point where students or college admin can access or update information.





THE TEAM AT TEEMAC IS A MIX OF PEOPLE FROM DOMAINS OF WEB DEVELOPMENT, BUSINESS AND USER EXPERIENCE DESIGN.

WHY WE USED THE TOOL:

We had realised that we are very idealistic when it comes to building features within the Curiosity platform. We usually follow our gut instinct, even when the institutions do not see an explicit value in them. For a change, we thought we would adopt a more evidence based approach before we start building the Amphitheater feature.

We used a combination of Problem Definition and Evidence Planning. This was to both define and create a logical evidence based plan for the problem we are trying to solve.

HOW WE USED THE TOOL:

Two of my team mates and I printed out the worksheets and sat around a table with our notes and thoughts. The Problem Definition tool only helped us articulate what we already knew. The most interesting part was the last question "Can you think of this problem in a different way? Can you reframe it?" Sometimes you look at a problem and try solve it very linearly, this question helped us deliberate if there was a different way of looking at the problem itself.

The Evidence Planning Worksheet was surprisingly interesting. When we started filling it out, we realised that we weren't convinced of the evidence backing the solution as well as the impact it could create. We ended up slightly confused about the direction and found ourselves arguing amongst each other. We haven't found the answers yet, but its still definitely a positive outcome.

RESULTS OF USING THE TOOL:

This activity made us doubt something that we were absolutely sure of creating. It helped us introspect and rethink an entire system we were going to create based on our intuition. It was a good exercise because it helped us achieve a deeper understanding of what we were trying to do.

It helped us introspect and rethink an entire system we were going to create based on our intuition.



I want to develop a clear plan by evaluating how I am doing and what my options are

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SWOT ANALYSIS

LEVEL OF INVOLVEMENT

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REQUIRES SOME DIALOGUE with colleagues/ peers. Plan for some time to interact and fill out in collaboration over a day maybe.

MindTools (1996) SWOT Analysis.

INSPIRED BY



What is it & why should I do it?

SWOT stands for Strengths, Weaknesses, Opportunities and Threats. A **SWOT Analysis** can be carried out for a specific project, organisation or even a whole sector. This analysis leads to a richer understanding of what the project or organisation can offer, the key weaknesses that need to be worked upon in order to succeed, and where to bring in external partners for assistance.

Completing a SWOT Analysis involves identifying and mapping the internal and external factors that are assisting or hindering you in achieving your goal. The SWOT Analysis provides a good framework for reviewing current strategies and directions, or even to test an idea while exploring solutions. It is particularly helpful to do a SWOT Analysis before the start of a project.

PHOW TO USE IT

A SWOT Analysis can be made for an entire organisation, but also for individual departments, programmes or even projects. Complete each of the quadrants in the worksheet according to what you see as your or your organisation's strengths and weaknesses as well as the external opportunities and threats that may help or hinder you. **Here are some tips to help you further:**

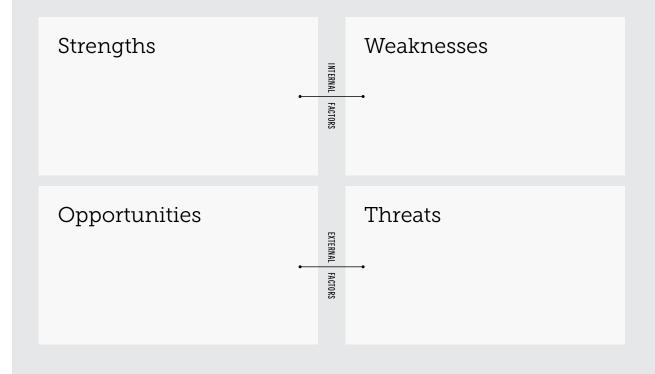
Be prepared: Get your facts and figures in place before you do the analysis.

Be comprehensive: Include all details, from the smallest ones (e.g. for issues at the most micro level like discussions in your team) to large ones (e.g. for new government regulation) that can impact your work.

Be self-critical: SWOT Analysis is there to stimulate critical reflection, not just to please yourself and/or others. Be open and don't get defensive. It is normal to have weaknesses as well as strengths, and to see both threats and opportunities. Sometimes talking about weaknesses or threats can even help you recognise strengths and opportunities.

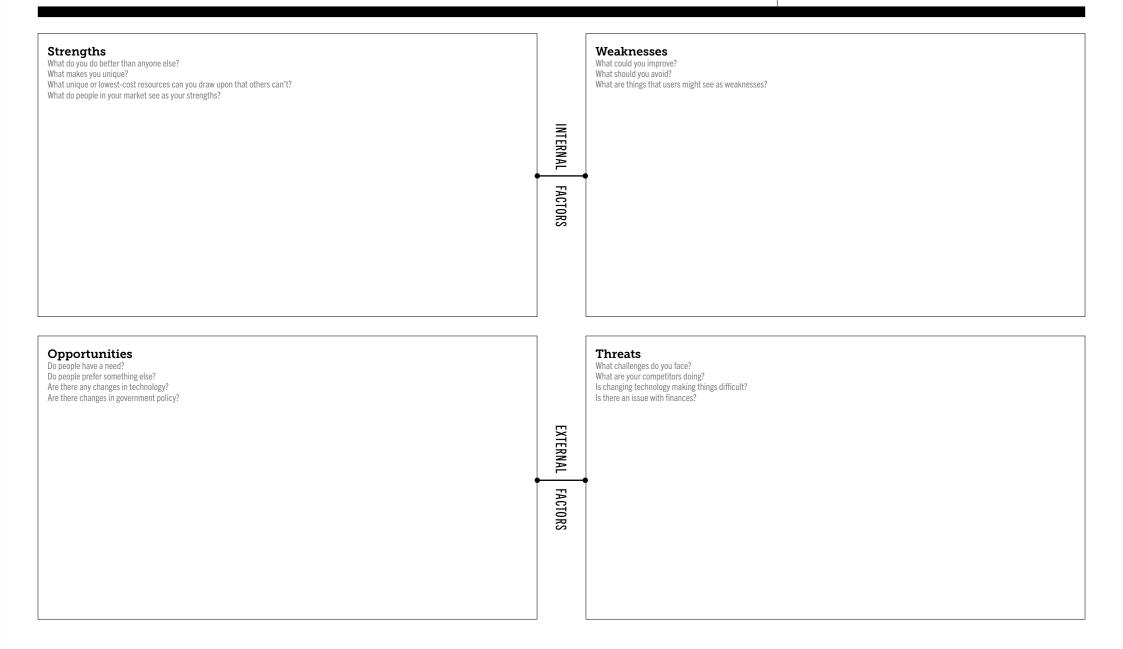
Test your analysis with others: Include others or maybe even ask an outsider (like your partner organisation) to do the same exercise and compare their views with your findings.

Repeat the analysis: As you go on with your work, new learnings and factors are bound to come up. Re-visit the SWOT Analysis to align your work and its course once every quarter or twice a year. **Use it as a guide:** Don't rely on SWOT too much – it's a guide that can help scope the way for further development.





SWOT ANALYSIS





I want to develop a clear plan on how to grow my idea into something bigger

BUSINESS MODEL CANVAS LEVEL OF INVOLVEMENT

CREATED BY

Ο

Osterwalder A., Pigneur Y (2010) Business Model Generation

MORE COMPLEX TOOL that should ideally be done over a few days. Given the strategic nature of the inputs/outputs, this needs consultations with seniors, peers and ideally needs to be revised after a first pass.

What is it & why should I do it?

The **Business Model Canvas** is a one page overview that lays out both what you do (or want to do), and how you go about doing it; enabling structured conversations around management and strategy by laying out the crucial activities and challenges involved with your initiative and how they relate to each other. This visual format, first introduced by Osterwalder and Pigneur, is useful for both existing and new organisations and businesses. Existing programmes can develop new initiatives and identify opportunities while becoming more efficient by illustrating potential trade-offs and aligning activities. New programmes can use it to plan and work out how to make their offering real.

The individual elements prompt thoughts within the separate activities or resources, while the capability to have the complete overview encourages fresh perspectives and ideas about how those pieces fit together. This structure also helps to keep group discussions more focused and bring everyone onto the same page.

PHOW TO USE IT

To make a Business Model Canvas, the easiest way to start is by filling out what you do. This helps keep the focus on your main goal as you fill out the other building blocks of the canvas. From there you can build on that goal and see how it can be achieved by adding details about the other activities and resources you have.

Start from a blank canvas and add notes with keywords to each building block of the canvas. If you use 'sticky notes' for this, you can move ideas around as you fill out each building block in the canvas. You may want to colour-code elements related to a specific client segment.

However, be careful not to fall in love with your first idea and instead sketch out alternative business models for the same product, service, or technology.

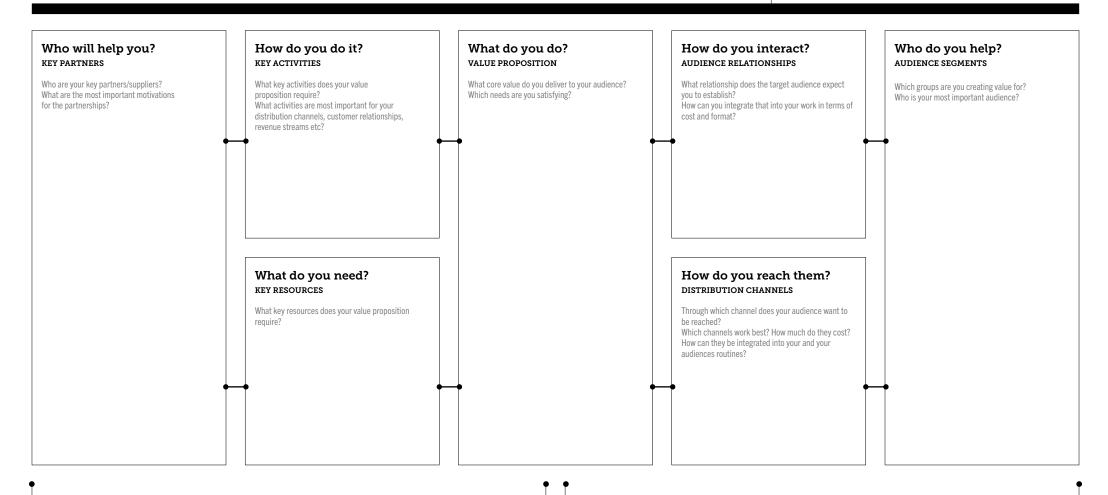
You could even practice and learn new ways of doing things by mapping out new/innovative business models that you admire or come across.





I want to develop a clear plan on how to grow my idea into something bigger

BUSINESS MODEL CANVAS



What will it cost? COST STRUCTURE

What are the most important costs in your work? Which key resources/ activities are most expensive?

How much will you make? REVENUE STREAM

For what value are your audiences willing to pay? What and how do they recently pay? How would they prefer to pay? How much does every revenue stream contribute to the overall revenues?



I want to develop a clear plan for working with other groups that have the same vision as me.

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BUILDING PARTNERSHIPS MAP LEVEL OF INVOLVEMENT



Tennyson R. (2003) 12 Phases in the Partnering Process, p4. In: The Partnering Toolbook.

MORE COMPLEX TOOL that should ideally be done over a few days. Given the strategic nature of the inputs/outputs, this needs consultations with seniors, peers and ideally needs to be revised after a first pass.

BUILDING PARTNERSHIPS MAP

O5DiY

What is it & why should I do it?

Many complex problems have several different yet related causes and effects - with several organisations from different sectors trying to solve things individually. With many organisations having limited resources, forming partnerships is a good approach to not only increase capability, but also your reach. Partnerships help build a common understanding, and harness the knowledge which might be spread across various different perspectives.

Building partnerships takes a lot of effort from all those involved. It often takes a considerable investment of time to build the high quality working relationships that underpin effective collaboration. The **Building Partnerships Map** breaks the process into steps, so you can anticipate difficulties and challenges ahead.

P HOW TO USE IT

The Building Partnerships Map describes a series of phases which a partnership might involve. The map indicates what is needed in each phase to make such partnerships work, offering guidelines rather than rules. Each phase, as outlined on the worksheet, is important and should not be neglected if the partnership is to remain balanced and on course to achieve its goals.

To work well, partnerships need to be mutually beneficial to the partners involved.

You can use the Building Partnerships Map to analyse at what phase of partnership you and your partner are, so that you can move through the next phases to build a strong partnership together.

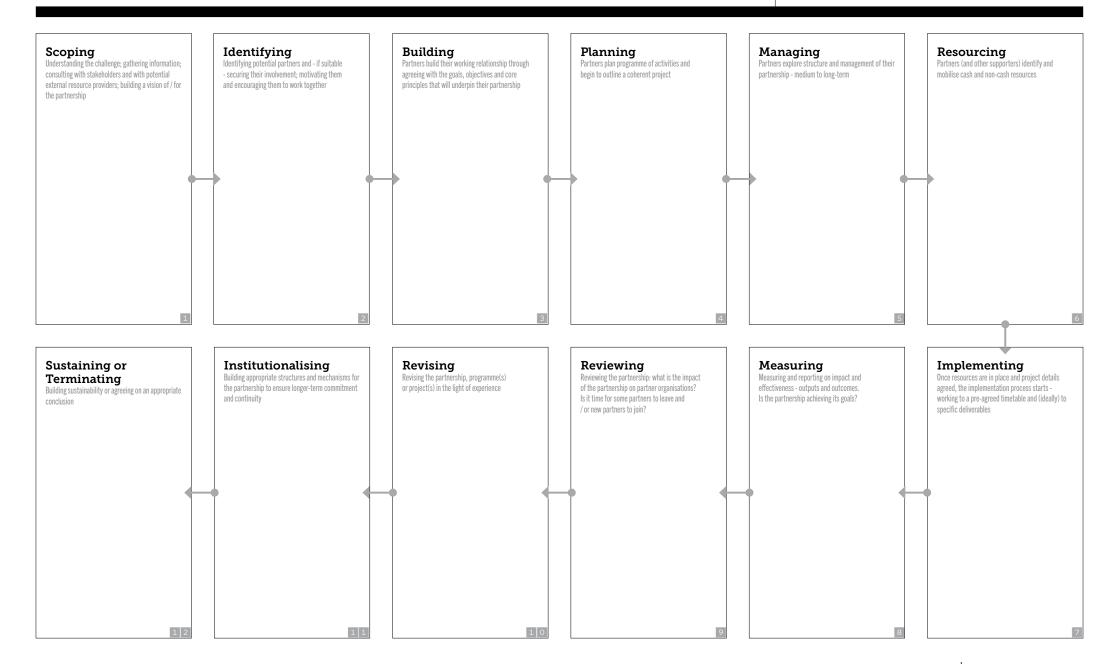
- · Identify the stage that shows where you are at
- Identify the stage where you would like to be
- Use the template as a map to build a pathway towards that stage The mapped pathway gives an outline of the activities that need to be done in between.

Scoping	Identifying	Building	Planning	Managing	Resourcing
	•	•	•	•	•
E	1 2	3	4	5	• 6
Sustaining or Terminating	Institutionalising	Revising	Reviewing	Measuring	Implementing
	+	• •	• •	• •	•
1 2	11	10	9	8	



I want to develop a clear plan for working with other groups that have the same vision as me.

BUILDING PARTNERSHIPS MAP





I want to develop a clear plan by improving upon what I've done before

LEARNING LOOP LEVEL OF INVOLVEMENT



IDEO (2011) Deliver: Create a learning plan, p145. In: IDEO, Human Centered Design Toolkit. Edition - 2. London: IDEO.

FAIRLY SIMPLE, SELF ADMINISTERED TOOL needs relatively less time.



What is it & why should I do it?

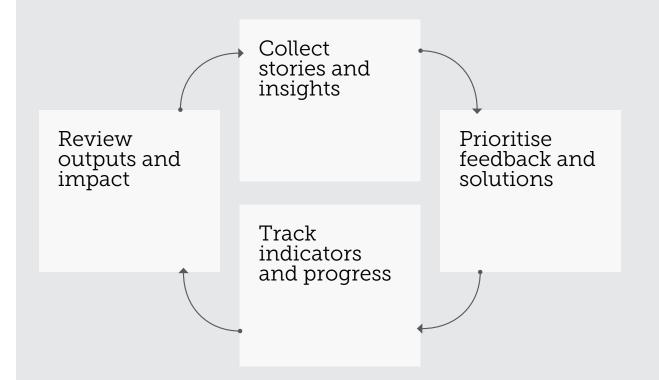
Learning is an ongoing cyclical process. The **Learning Loop** is a tool that helps you to define how the work you do now informs what you do next. It provides a high-level perspective on how implementing social change can be broken down into a gradual process of iterative cycles.

The worksheet, inspired by the Learning Plan from IDEO (2011), describes four different stages that your work might pass through in a cycle of continual improvement. Using this tool can help understand the different phases involved when trying to implement your ideas. By reflecting on the process involved, it can help you to understand what to do next.

PHOW TO USE IT

This tool offers you a framework to plan with and work in. Each of the four components relate to the methods, systems and processes that your organisation works with. It helps you check whether your organisation actually learns from its experiences (both success and failure) and is improving continuously.

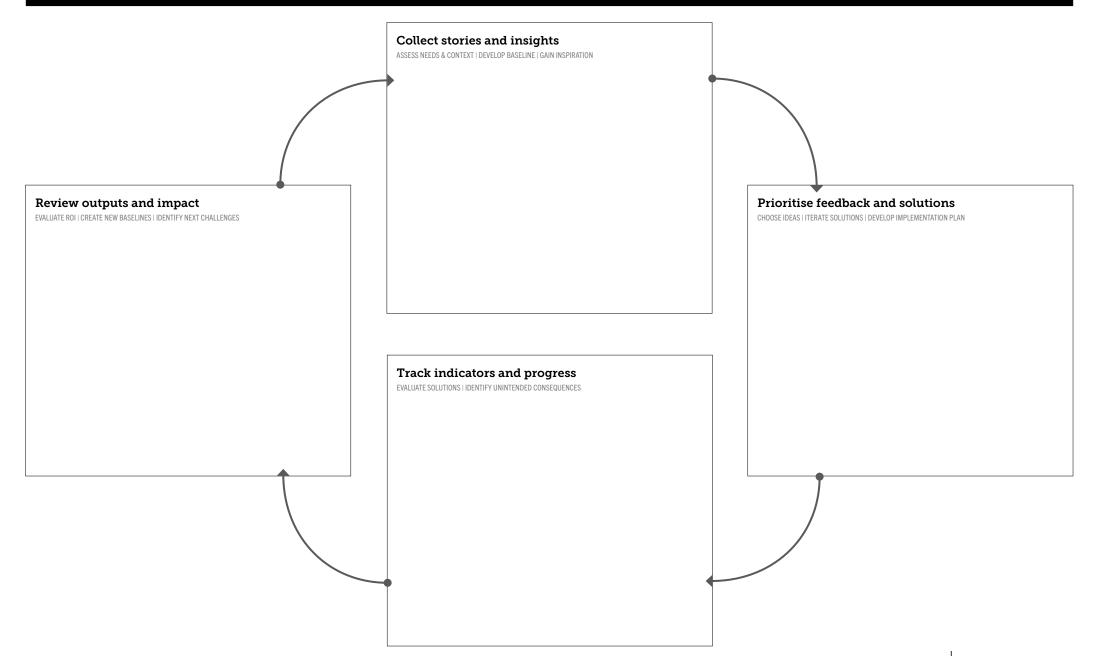
Use the Learning Loop worksheet to make notes in each of the four quadrants. There is no strict start or end to this process - you could use the worksheet to plan a new project or make notes on a current project. Essentially the learnings you gain by collecting stories, feedback or outcomes will help you to reconsider and improve the next steps in your process.





I want to develop a clear plan by improving upon what I've done before

LEARNING LOOP





TOOL USED: BUSINESS MODEL CANVAS ORGANISATION: SBCSOL - INCUBADORA DE EMPREENDIMENTOS SOLIDARIOS COUNTRY: BRAZIL SECTOR: ENTREPRENEURSHIP AND SKILL DEVELOPMENT ROLE: SOCIAL DESIGNER CONTACT PERSON: RENATA MENDES

EMAIL: RENATACM@UOL.COM.BR



TWO MEMBERS FROM THE 'NÓ CEGO CIA DE PALHAÇOS' COLLECTIVE.

Currently the clowns have very scarce infrastructure (such as space for physical activity, financial support and marketing resources) and while they are extremely skilled and passionate about what they do, they are slightly disheartened by the lack of 'paid work'.

The Nó Cego Cia de Palhaços ('Palhaços' translates to 'clowns' in Portuguese) is a group of four people who believe in the power of clown training as a healing tool for 'a society whose greatest need is 'the experience of love'. They work with the Center for Psychosocial Support (CAPS), where they use the craft of clowning (and other creative psychotherapy techniques) as a restorative instrument for members undergoing mental treatment and marginalised people who are physically or emotionally unstable. Their work relies heavily on skilled group coordinators who are passionate about craft and who desire recognition through social work, but still need to be incentivised through some professional income generation.



RENATA EXPLAINS THE DIFFERENT CATEGORY HEADS IN THE ADAPTED BUSINESS MODEL CANVAS WORKSHEET

WHY WE USED THE TOOL:

The Nó Cego Cia de Palhaços are being incubated at the SBCSol Programme, where they are currently figuring out ways to broaden their avenues and resources. Though their service is well figured out, the business aspect of the palhaços' work is still in its embryonic stages. We decided to use the Business Model Canvas tool to create a new value proposition for the clowns, one that conveys they are a professional and competitive service while staying true to their rich history and experience. We wanted to make the foundation of this business plan as participatory as possible and included as many people we could to help us build the canvas.



THE PALHAÇOS LOOKING AT THEIR COMPLETED CANVAS AND FIGURING OUT NEXT STEPS FOR THEIR RENEWED BUSINESS MODEL

HOW WE USED THE TOOL:

To make it more relevant to the palhaços', we adapted the tool and added more context specific questions to it. Then to help the ideas flow better, we broke the activity into 2 parts :

Initial Brainstorm : We started the activity as a big group, the participants could pick any number of questions they wanted to answer, in any particular order.

Detailing : After this first step, we put together teams of people with similar ideas and asked them to elaborate on each subject, particularly the value proposition. Breaking up into these panels helped the group create detailed content for the canvas. The tool introduces the concept of 'business thinking' to people who have no prior experience as entrepreneurs.

It helped the palhaços organise their thoughts and was instrumental in helping them construct concrete goals for themselves and detailing out activities needed for each stage.

RESULTS OF USING THE TOOL:

The tool introduces the concept of 'business thinking' to people who have no prior experience as entrepreneurs. It helped the palhaços organise their thoughts and was instrumental in helping them construct concrete goals for themselves and detailing out activities needed for each stage. Furthermore, the tool provided an accessible language for everyone, even those with lower education. Guided by the questions on the canvas, we built a very solid value proposition, which guided the development of other areas of the business model.

CASE STUDY



TOOL USED: BUSINESS MODEL CANVAS ORGANISATION: SBCSOL - INCUBADORA DE EMPREENDIMENTOS SOLIDARIOS COUNTRY: BRAZIL SECTOR: ENTREPRENEURSHIP AND SKILL DEVELOPMENT ROLE: SOCIAL DESIGNER CONTACT PERSON: RENATA MENDES EMAIL: RENATACM@UOL.COM.BR

Based near the southern coast of Sao Paulo, the Criqué Caiçara's formed by seven local residents, is part of a traditional community and is supported by the Elos Institute and the NGO Central Artesol.

The aim of this community is to preserve the culture, the environment and generate job opportunities using artisanal know how. From caixeta, the wood that is native to the area, products are created using the elements found in Juréia (one of Brazil's Ecological Stations i.e. preservation area). These include educational toys, accessories and home wares.



(TOP) ARTISANS CREATING CRAFT PRODUCTS IN THE WOOD WORKSHOP; (BOTTOM) THE PARTICIPATORY BUSINESS MODEL CANVAS EXERCISE WITH THE COMMUNITY.

WHY WE USED THE TOOL:

We wanted to build the business on the existing strengths of the work - on what was already being done, and create a social business that is sensitive to the local environment, community and the craft. We wanted to start building the foundation of a business plan with as much participation as possible so that the people who form the community also choose how their business would be.

HOW WE USED THE TOOL:

Until now the group was only looking at activities, but seeing all aspects of a business laid out in one visual, helped us connect the different elements and activities in the business. The key activities thus became the point from which we started filling out our Canvas. This exercise generated a flow chart that contained all areas of the business, and who is responsible for each of the areas.

RESULTS OF USING THE TOOL:

Having the business model laid out in a one sheet visual helped the group find connections between the different aspects of business while also coming up with new ideas and even repurposing known information in a new way. The tool enabled discussion of each area of the business, which was especially important for Criqué Caiçara where different functions are performed by the same people due to it being a small group. Crique Caiçara is a family group which includes both young children and their mothers as part of their group. The Business Model Canvas was key in the active participation of all, helping capture aspirations of both older and younger participants in a short time. The tool is useful to facilitate introducing business concepts for the artisans, helping them acquire a more entrepreneurial outlook by focusing towards more concrete goals.

This workshop helped optimise our work: improving time management, helping better use of skills.

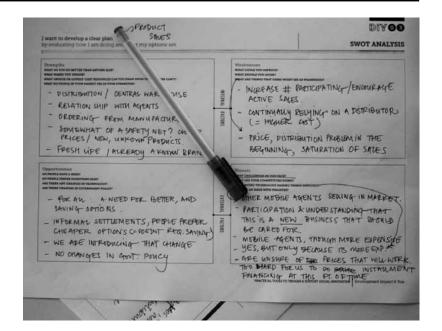
We wanted to build the business on the existing strengths of the work - on what was already being done, and create a social business that is sensitive to the local environment, community and the craft.



TOOL USED: SWOT ANALYSIS ORGANISATION: SANERGY COUNTRY: KENYA SECTOR: WASH (WATER, SANITATION AND HYGIENE) ROLE: SPECIAL PROJECTS CONSULTANT CONTACT PERSON: MARIELLE SCHWEICKART EMAIL: MARIELLE@SANER.GY

"I am working on a project to diversify the income streams of microentrepreneurs in the community in which we work. I am actually well into this project and I wasn't attempting to solve a problem, per se, but I thought that some of the tools could help me think through the next few stages of it. I used the SWOT Analysis tool as a self evaluation exercise, but decided to change it a bit, by pretending I had filled it for my project 2 months ago."

"This tool worked well and helped me view my project as holistically as possible and I think it would have been useful if I used it in the beginning of the project."



THE FILLED OUT SWOT ANALYSIS SHEET FOR A PRODUCT SALES PROJECT AT SANERGY

DEVETOP SATUR TOK REEPING CARRY OUT IN MIND THE REE-BID STD NATURE OF THE STW/TIR LEADS CHECKUST FOR BUILDING PARTNERSHIPS MAP PROECT/PROY TO A FULL DETAIL PLAN FINANCIAL/PEOLA FERGED PRUPOSAL CAPACITIES INCLUDING A WITH EXPECTED PARTNERS TO SUCC. PARTNER. 9H-NTT CHART OUTCOMES MOBILIZE TERMS SHIRS GO TO DISCUSSED ALGING ACTIVITIES PARTIVERS LOME WITH STRATES BOTH EXISTING NEXT STEP ALONGWITH IN WITH EXISTING AND NEW HIPES TIME FRAMES ARTNER IN G NON CASH BUDGETS INLINE W/ ENDS ON CE THE PARINERS EXPERIENCE RESOMELES (ARISMU PRUTER DESIGN OUT OF PAST EXP. ARGER BY INSTITUTOWILLED APPROPRIATE FROMGOVI Bu LOCAL RESOURCES REPLICATING IN RECOMPTENDA TODA PERIONIC REVIEW CBOTH CASH AND #FFECTED WDER GEDG-AMMENDMENTS IFI END-LINE TO ASSESS STRATEGY NOW - CASH AREA Z PART ARE INCORPORATED MONTHLY PROGRESS AWATION & BRING ABT. ICIPATION OF GOVT PELLING WHAT BOTH PROG HEFTORTS AS WELL MODIFICATIONS WOEKED & WHAT STRUCTURES FOR FINANGAL IN FORMAC LAUNCH AS NEEDED AS REGULAR DIDN'T OF PROSECT/PDOE WITCHING VISITS WITH BASED EVIDENCE MULUDES WOWING AU THE LOCAL TNAW GAL ZEVIEW STAKEHOUDERS& STAFF DOING SALLOW AULON BOARD PERIODIC 4 DUTLINING



TOOL USED: BUILDING PARTNERSHIPS MAP ORGANISATION: FHI360 COUNTRY: INDIA SECTOR: PUBLIC HEALTH, NUTRITION AND WASH ROLE: TEAM LEADER CONTACT PERSON: SUBBANAICKER KRISHNASWAMY EMAIL: SKRISHNASWAMY@MPTAST.ORG

THE VARIOUS DIMENSIONS OF BUILDING PARTNERSHIPS FOR MPTAST PROGRAMMES.

MPTAST (Madhya Pradesh Technical Assistance and Support Team) is a part of the MP Health Sector Reforms Project (MPHSRP) and supports the State Health department in achieving milestones for improved health, nutrition, water, sanitation and hygiene services in 16 identified, underserved districts in the state of Madhya Pradesh, India. The project anticipates that by 2015, Madhya Pradesh families and communities will benefit from an integrated package of high-impact and high-quality health services delivered in a coordinated, sustainable and cost-effective manner and requires partnering with several stakeholders (operating at a micro and macro scale) to help achieve this impact.

We are currently in the process of identifying various partners that will work in 8 districts (serving a population of roughly 72 million people) on various aspects of the programme :

• NGO Partners who are meant to carry out programme evaluations in the form of baseline and mid term research and an impact assessment at the end of the project.

- Capacity building NGOs who develop and modify Participatory Learning Action (PLA*) modules and are also responsible for putting a management information system in place.
- An implementing partner for rolling out the PLA modules.
- An agency to provide technical support to government counterparts, i.e. the State Livelihood Mission (SRLM), and help them identify a HR agency to recruit and manage the HR on behalf of the government.

*Participatory Learning and Action (PLA) is a form of action research. It is a practical, adaptive research strategy that enables diverse groups and individuals to learn, work and act together in a co-operative manner, to focus on issues of joint concern, identify challenges and generate positive responses in a collaborative and democratic manner.

WHY WE USED THE TOOL:

Bringing these partners with varying levels and varying nature of involvement has proven to be a real challenge for us. We used the Building Partnerships tool to map out how to proceed with engaging with these four specific stakeholders, even before they have been identified.

RESULTS OF USING THE TOOL:

This tool analytically separated several related concepts/dimensions to forging partnerships which needs to be kept in mind while building them. It becomes very important to recognise these finer points so that none are missed out however small it may be.



TOOL USED: LEARNING LOOP ORGANISATION: FHI360 COUNTRY: INDIA SECTOR: PUBLIC HEALTH, NUTRITION AND WATER, SANITATION & HYGIENE (WASH) ROLE: TEAM LEADER CONTACT PERSON: SUBBANAICKER KRISHNASWAMY EMAIL: SKRISHNASWAMY@MPTAST.ORG

The problem I was trying to tackle is that of under reporting/non-reporting of maternal and child deaths, which are crucial social indicators of Public Health & Nutrition.

Need was to identif district level monit LEARNING LOOP infant & maternal deaths in . This will help in strategizi ine monitoria their prevention & strengthen Hempts made to identif there was no clarity punishment. Maybe Prioritis many cooks in the system PISCUSSED IRCAS Develop with trams to Plans ere drawn

A LEARNING LOOP PLAN FOR THE STATE INFANT AND MOTHER HEALTH AND NUTRITION PROGRAMME MANAGED BY MPTAST.

I head the MPTAST that gives technical assistance and management support to Government of Madhya Pradesh, a central Indian State, covering the areas of Health and Family Welfare, Women Child Development and Panchayati Raj and Rural Development.

This under reporting/ non-reporting leads to an even bigger problem of hampering corrective measures that could actually help reduce the numbers of maternal and child deaths.

WHY & HOW WE USED THE TOOL:

I used the Learning Loop with the participation of all the stake holders involved in finding a solution. The Monitoring and Evaluation (M&E) specialist along with my service delivery personnel visited one of the pilot districts to find out the possible channels for reporting the deaths of mothers and children more quickly. This was discussed with various stakeholders - grassroots health care workers, village level volunteers and the village level nutrition workers to establish their awareness levels and the reasons for not reporting these cases.

RESULTS OF USING THE TOOL:

We then worked with the MCTS (Mother & Child Tracking System), which is an online monitoring software, developed by Government of India with an objective to track the different services being provided/ to be provided to a pregnant mother right from conception until the baby is a year old. The problem and our learnings from the pilot district was then discussed with the District health authorities who agreed to try out a new system. The new system was also proposed to the state leadership, who readily agreed to it for monitoring maternal and child deaths.

This is a good tool that spells out the interrelatedness of a social phenomenon and how to address them in a very succinct manner.

One can use it literally for any social indicator that requires an innovative solution. This would help in understanding the intra and inter district differentials and the factors that possibly contribute to this phenomenon and alert the authorities for taking timely action. This is a good tool that spells out the inter relatedness of a social phenomenon and how to address them in a very succinct manner. One can use it literally for any social indicator that requires a innovative solution.

We will be rolling out the concept very soon and are in the process of refining the concept for buy-in from the State government, based on the pilot results from one district.



I want to clarify my priorities by learning from first hand experiences

EXPERIENCE TOUR

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INSPIRED BY Design Council (2011) Service Safari. In: Keeping Connected Design Challenge.

LEVEL OF INVOLVEMENT

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MORE COMPLEX TOOL that should ideally be done over a few days. Given the strategic nature of the inputs/outputs, this needs consultations with seniors, peers and ideally needs to be revised after a first pass.



What is it & why should I do it?

Going on an **Experience Tour** means immersing yourself totally in a particular environment so you can gain a first-hand perspective of the situation or context. Experience Tours can help 'ground' your thinking; they give you a clear perspective for developing ideas that are intimately connected with the people you're working for.

This tool provides a structure for reflecting upon and collecting insights from your first hand experiences. There are guidelines to help you focus on the experiences of the people you are trying to understand, and to collect the type of materials you will need afterwards to start developing ideas.

PHOW TO USE IT

Experience Tours are a good way to spark inspirations by learning first-hand about what makes a great experience - or even what not to do, in the event that you encounter a negative experience. As going on an Experience Tour often means being out and about, it may be difficult to make structured notes on a worksheet. Take a good look at the questions on the worksheet before you go out to get some prompts on the things to look out for.

You can either fill out the worksheet as the Experience Tour progresses, or use it to jot down quick reminders and then sit down later to fill in all the details.

The idea is to really try and reflect upon the experience and understand the deeper layers - think about how it made you feel, as well as exactly what happened. You can complete one worksheet for every tour you make and later compare these to find relevant connections or even differences.

The questions on the worksheet are examples, you can customise the worksheet to make it relevant to your work.

What is the focus for this tour?	What information is used? What's missing?	What works well?	Additional notes & remarks
What are the practices observed?	What products are used?	What doesn't work well? What can be improved?	
Who is involved?	What is the environment like?		



EXPERIENCE TOUR

What is the focus for this tour?	What information is used? What's missing?	What works well?	Additional notes & remarks
What are the practices observed?	_		
•			
	What products are used?		
		What doesn't work well? What can be improved?	
	_		
Who is involved?			
	What is the environment like?		



I want to clarify my priorities by focusing on key critical issues

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INSPIRED BY

PROBLEM DEFINITION LEVEL OF INVOLVEMENT



FAIRLY SIMPLE, SELF ADMINISTERED TOOL needs relatively less time.

Julier J., Kimbell L. (2012) Problem Definition. p30. In: The Social Design Methods Menu.

What is it & why should I do it?

Defining a problem is a deceptively simple task - what at first seems to be the problem is often merely a symptom of a deeper problem. This tool works to both open a problem up - presenting it in a way that can be examined from a number of angles - as well as helping to define the wider context and associated issues involved.

This is particularly effective when trying to focus a team of people on the key problems at hand. This tool has been designed to structure the analysis of a particular problem in a way that makes good use of your time. It introduces a small set of key criteria by which an issue can be articulated and assessed, which makes the activity highly efficient. It also gives you a standardised way to compare several different problems which might seem to be very different on the surface.

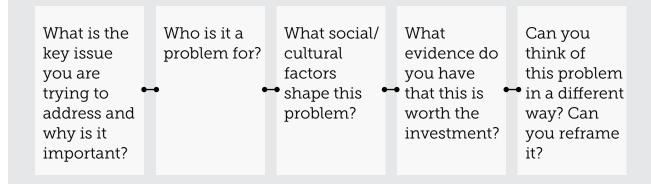
PHOW TO USE IT

Go through the Problem Definition worksheet individually or in small teams and reflect on a specific issue you have identified, exchanging thoughts while writing down your notes. The key aim here is to capture, compare and discuss different viewpoints on the problem. You can then review the notes and discuss with your team members whether you are making the same assumptions, and whether you are framing things in the same way.

This exercise may lead you to 'reframe' the problem you initially addressed – for example, what happens if you see older people as having capacities, rather than needs? Reframing problems in such a way can offer clues to how the solution can take shape. Working on a Problem Definition worksheet with not only your

bring up new contexts. For instance, working with service users, staff or volunteers may provide a slightly different angle to the tool than when working with managers or entrepreneurs. Feel free to experiment and rephrase questions in the worksheet to keep them relevant in such situations.

team members, but together with other stakeholders, will usually





I want to clarify my priorities by focusing on key critical issues

PROBLEM DEFINITION

What is the key issue you are trying to address and why is it important?	Who is it a problem for?	What social/cultural factors shape this problem?	What evidence do you have that this is worth the invest- ment?	Can you think of this problem in a different way? Can you reframe it?



I want to clarify my priorities by breaking down a complex issue

CAUSES DIAGRAM LEVEL OF INVOLVEMENT

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INSPIRED B



Namahn and Yellow Window Service Design, Design Flanders (2012) Cause Diagram. In: Service design toolkit.

FAIRLY SIMPLE, SELF ADMINISTERED TOOL needs relatively less time.



What is it & why should I do it?

What is the root cause of a problem? Often there isn't one simple answer. The bigger the problem, the more likely it is that the roots will be widespread, and mapping out the causes can quickly get out of hand, making the task seem overwhelming.

The **Causes Diagram** helps you think of a problem in a thorough manner and provides a structured way to analyse it. It pushes you to deconstruct all possible causes for the problem rather than the obvious ones. You can use it both to analyse a new problem and to highlight the gaps in an existing one.

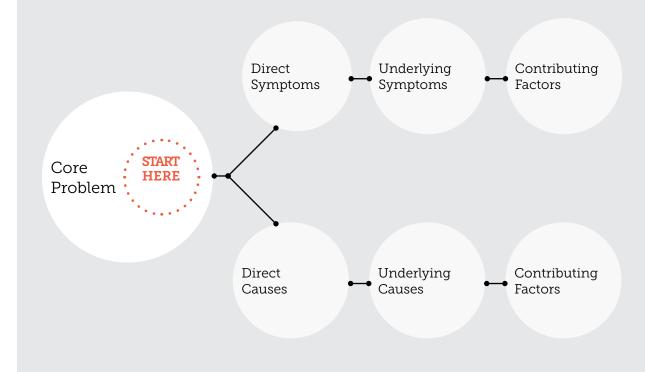
It differentiates causes from effects or symptoms, giving you a better idea of the solutions needed to solve a problem permanently, and helps to build a shared understanding of what it is you're working on.

PHOW TO USE IT

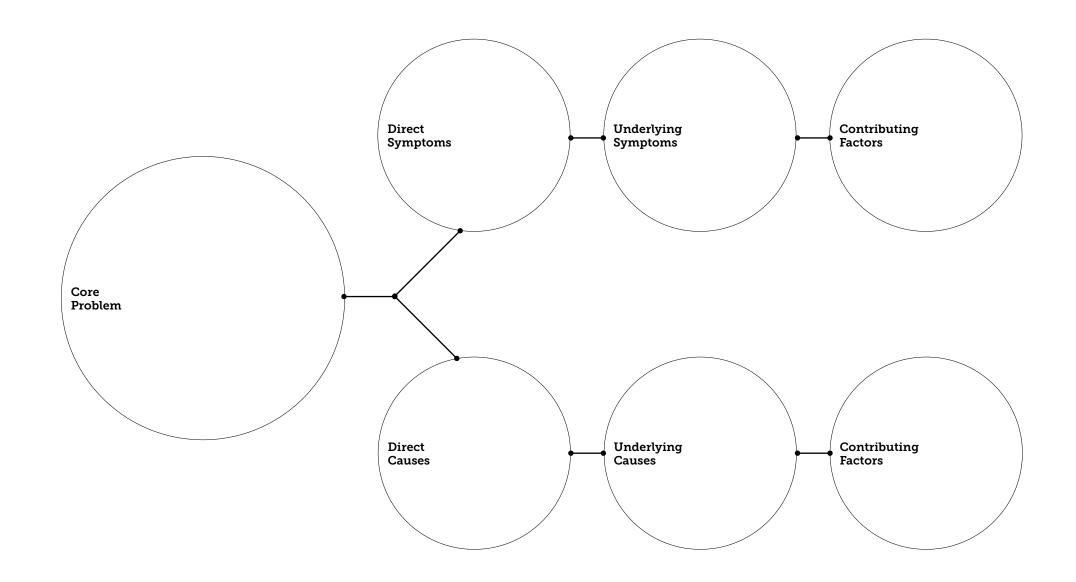
First, identify and write down the core problem you are trying to resolve.

Working your way from this starting point, write down the direct, underlying and contributing symptoms you see as a result of it. These may be people involved with the problem, systems, equipment, materials, external forces, etc. Try drawing out as many contributing factors as possible. Now fill out the causes that correspond to these symptoms. Once the worksheet has been filled out, go through each symptom and cause with your team and consider if they are correctly placed, and discuss what you can learn from this in terms of clarifying your aims.

Be careful to not mix the causes of a problem with its symptoms as you note these down - a cause is the reason why something happens, while a symptom is usually what we see as the end result of the problem.









I want to clarify my priorities by defining my goals and the path to reach them

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Nesta (2011) Theory of Change.

INSPIRED BY

THEORY OF CHANGE

LEVEL OF INVOLVEMENT

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REQUIRES SOME DIALOGUE with colleagues/ peers. plan for some time to interact and fill out in collaboration over a day maybe.



What is it & why should I do it?

Setting up a **Theory of Change** is like making a road map that outlines the steps by which you plan to achieve your goal. It helps you define whether your work is contributing towards achieving the impact you envision, and if there is another way that you need to consider as well.

The Theory of Change tool not only helps to clearly articulate and connect your work to your bigger goal, it also allows you to spot potential risks in your plan by sharing the underlying assumptions in each step. In large organisations, when there may be several projects running simultaneously, the Theory of Change helps to map these different projects first and then consider how they link and relate to each other.

This tool can also aid in aligning team members to the larger end goal, and help them understand their role in achieving it.

PHOW TO USE IT

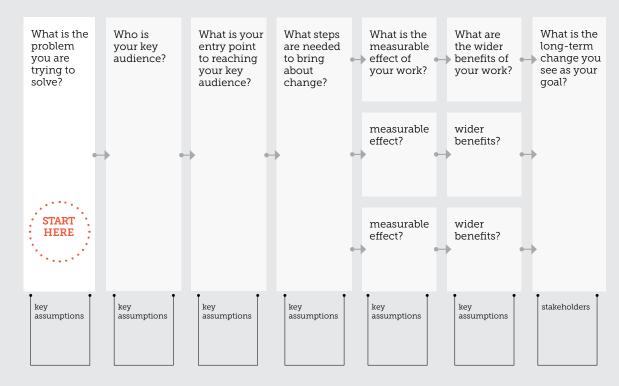
Start by noting down the main problem you want to solve, and also your long term vision on the change you want to accomplish. Then complete the other boxes, such as your key audience and your entry point to reach that audience. Try to be as specific as possible because it will help you to come up with more effective actions that you can take.

Work outwards from your defining problem, and towards your long-term impact. Write down the people that are most affected by the issue that you've identified and who you hope to help with your work – this could be a small community group or a large organisation. Then think about where to start your work, you may need to find a place, a person or a thing that will be your first port of call. Try to think of some practical steps that you can take to

make changes – like creating partnerships, or making tweaks to existing processes. Try to keep these as action-oriented as possible.

And finally, what would the immediate results or outcomes be? These could be tangible results that you can show to other people to clarify how your work is making a difference. List the key outcomes that your activity would lead to: these are the preconditions that you need to realise your vision.

As you fill each of the boxes in the worksheet, it is critical to also reflect on the key assumptions that underpin these steps in your work. This may help you to spot potential risks or connections between the different projects.

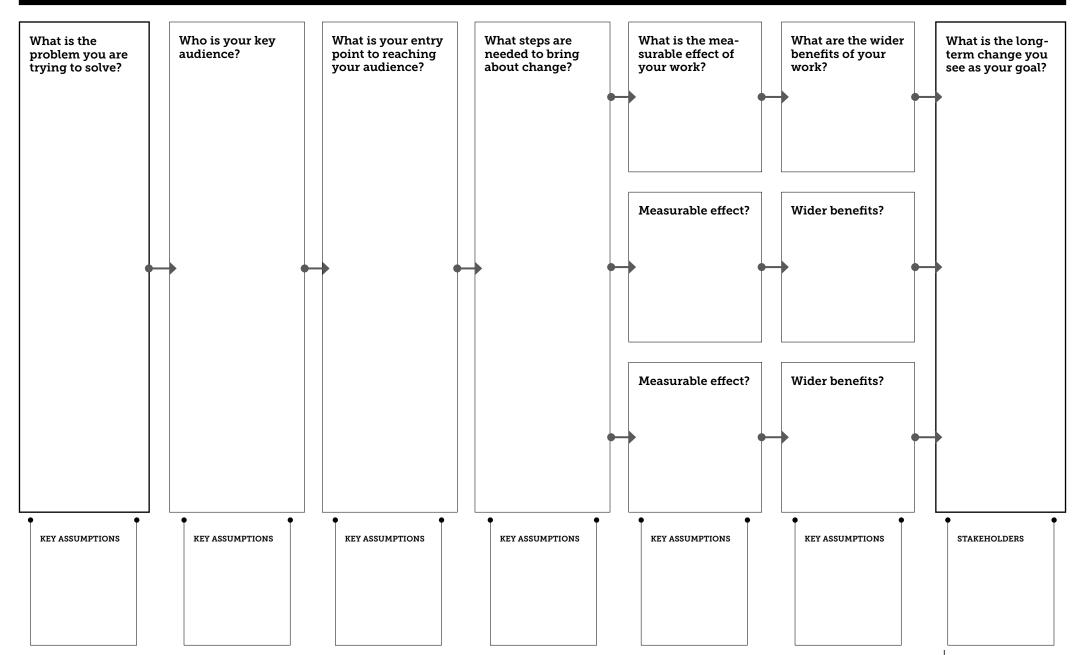




I want to clarify my priorities

by defining my goals and the path to reach them







CASE STUDY

TOOL USED: PROBLEM DEFINITION, CAUSES DIAGRAM ORGANISATION: UNDP UZBEKISTAN COUNTRY: UZBEKISTAN SECTOR: COMMUNITY OUTREACH / EDUCATION ROLE: COMMUNITY OUTREACH SPECIALIST CONTACT PERSON: ANDREAS KARPATI EMAIL: ANDREAS.KARPATI@UNDP.ORG

Development Fund of Children's Sport under the Ministry of Public Education in Uzbekistan was concerned that despite a large-scale investment programme into sports complexes, the use of these facilities has been below expectations, especially outside Tashkent.



WORKSHOPS WITH STUDENTS TO IDENTIFY PROBLEMS AND RELEVANT CAUSES FOR UNDER-PARTICIPATION OF SCHOOL STUDENTS IN LOCAL SPORTS PROGRAMMES

The Children's Sports Fund is particularly concerned about the participation of girls from rural areas in sports, who often miss out on the benefits of doing sports due to a lack of parental awareness, encouragement or even permission. Despite major investments into infrastructure and programmes guaranteeing free access to sports facilities, how do we get people to use the facilities?



WHY WE USED THE TOOL:

We organised a workshop on social innovation with young citizens - students from a local partner university, focused on the 'sport for social inclusion'. Promising project proposals that come out of this, were eligible to be considered for a small grant award of up to \$1,500. While making these project proposals, we used a number of tools such as Target Group, Personas to think about the users and Problem Definition, Causes Diagram to think about possible problems and solutions. The tools were chosen along three main criteria:

- 1. Suitability for a small-scale volunteer project without commercial elements.
- 2. Applicable for an early, pre-prototyping stage of the social innovation process (emphasis on ideation, problem definition, working out users).
- 3. Can be carried out in less than an hour in a classroom/workshop setting.

Using the tools helped to familiarise ourselves with the problem and root out actionable causes, some of which were unexpected and new to us.

HOW WE USED THE TOOL:

We used Problem Definition and Causes Diagram in a workshop to help encourage students think more broadly about the problem, and possible solutions. However, it was only after encouraging students to ask successive 'why' questions that the exercise really led to new insights. Often they would jump ahead without identifying more nuances and identify 'economic problems' or 'traditions' as second-order causes. Once encouraged to be more specific however, they found interesting and sometimes unexpected causes for low participation in sports, including for example the fear of injuries (in conjunction with low standards of health services) or lack of street lighting (in conjunction with safety concerns).

RESULTS OF USING THE TOOL:

The Problem Definition tool aids to define and to realise a certain problem more deeply, and the Causes Diagram helps collect all factors and causes of that problem, so one is able to tackle it. Using the tools helped to familiarise ourselves with the problem and root out actionable causes, some of which were unexpected and new to us.



CASE STUDY

TOOL USED: THEORY OF CHANGE, CAUSES DIAGRAM ORGANISATION: MP TECHNICAL ASSISTANCE AND SUPPORTIVE TEAM (MPTAST) COUNTRY: INDIA SECTOR: PUBLIC HEALTH, NUTRITION AND WATER, SANITATION & HYGIENE (WASH) ROLE: DISTRICT PROJECT COORDINATOR CONTACT PERSON: RAVI KOMMURI EMAIL: RKOMMURI@MPTAST.ORG



USING THE THEORY OF CHANGE AND CAUSES DIAGRAM TOOL WITH THE AUXILIARY NURSE MIDWIFE, BLOCK PROJECT MANAGER AND MULTI PURPOSE WORKER IN THE VILLAGE.



FINAL THEORY OF CHANGE WORKSHEET THAT CULMINATED FROM THE GROUP EXERCISE.

I have been working with fhi360 in assisting the Government of Madhya Pradesh (MP) to implement MPHSRP (Madhya Pradesh Health Sector Reforms Programme) since a year.

MCTS (Mother & Child Tracking System) is an online monitoring software which has been developed by Government of India with an objective to track the different services being provided/ to be provided to a pregnant mother right from conception until the baby turns one year old.

Madhya Pradesh, a state in central India has very high infant and mother mortality rates, compared to the national average. Our programme helps strengthen the system and we work closely with the Health Department, WCD (Women & Child Development) & PHED (Public Health Engineering Department) departments aiming to reduce MMR (Maternal Mortality Ratio), IMR (Infant Mortality Ratio), Malnutrition & TFR (Total Fertility Rate) in the state of Madhya Pradesh in India.

The tracking system still needs to be worked upon further before it can be implemented.

WHY WE USED THE TOOL:

My team mates and I used the Theory of Change and Causes Diagram in one combination and SWOT Analysis, Question Ladder and the Critical Task list in another combination. Our aim was to find ways to strengthen the usage of the MCTS software and also re-define roles, incentives and contingency strategies for all the people and stakeholders responsible for its functioning. We did this by first using a set of tools to re-visit and resolve the problem at hand, and then using another set of tools to identify potential team members and a critical pathway to implement our solution.

HOW WE USED THE TOOL:

We tested these tools as a pilot in one of the villages in Jabalpur district, Madhya Pradesh. First, I explained the purpose of doing the whole exercise to my team and with their help tried to get an idea of :

- exactly what is going on?
- who are the people involved and what their roles are?
- what are the bottlenecks that we should work towards to solve the issue?

We then used a combination of Theory of Change and Causes Diagram.

THEORY OF CHANGE

To give a clear idea on what is planned for change – i.e. updating the service in the MCTS system and how it affects their everyday work, how it will help the Programme Manager for decision making and how it is going to impact the overall Infant Mortality Rate over a period of time.

CAUSES DIAGRAM

Identify the bottlenecks which are hindering the MCTS service from updating. To learn from all the root issues and devise a better solution accordingly.

RESULTS OF USING THE TOOL:

The Theory of Change tool helped the team understand that even their role as grassroot workers can contribute to a larger change over time. This was key to achieve any success for the programme and helping create an attitude change towards their work. The tool also helped iron out inefficiencies in the current system in a holistic manner.

The Causes Diagram helped the team realise that while there exists a messy array of convoluted issues, distilling it to the one or two more important and actionable problems was a better strategy. This tool helped the team understand and define the cause of current inefficiencies in a structured manner and helped them identify what to work towards to fix a core problem.



CASE STUDY

TOOL USED: CAUSES DIAGRAM ORGANISATION: SANERGY COUNTRY: KENYA SECTOR: WATER, SANITATION & HYGIENE (WASH) CONTACT PERSON: SIMON DIXON EMAIL: SIMON@SANER.GY

We have been having problems boosting individual performances within the Sales and Operations team in our organisation.

Realising that these are often linked to the larger system, we decided to look at the whole Sales and Operations element of the business and form a coordinated change programme.

We have been holding a series of workshops to do this and I thought the Causes Diagram may help us identify issues, understand them and their causes, and subsequently search for solutions. We adapted the tool to suit our way of presentation and with the outputs we have moved forward to the planning stage wherein we now begin to address the core issues informed by the causes.



I want to collect input from others by observing and learning from everyday life

PEOPLE SHADOWING LEVEL OF INVOLVEMENT

INSPIRED B



Lovlie L.,Reason B.,Polaine A. (2013) Service Design: From Insight to Implementation. p54-p57. Rosenfeld Media

REQUIRES SOME DIALOGUE with colleagues/ peers. Plan for some time to interact and fill out in collaboration over a day maybe. **11 D**

What is it & why should I do it?

Shadowing means just that - becoming someone's shadow for a while. Following someone, or a group of people, as they live their everyday life, or go about their daily work helps to understand the environment they are a part of. It also allows you to observe for yourself the contextual details that can influence a person's behaviour and motivations.

Often doing some Shadowing at the start of a project helps to familiarise yourself with a certain practice or group of people. People's everyday life can be so habitual that some issues may not be as apparent to them sometimes observing them can reveal hidden aspects that might be the core issue or even possible solution. These observations can act not only as inspiration but also a guide to help reach the core of how your work impacts people.

PHOW TO USE IT

Shadowing involves making many choices - not just who to follow, but also when and how to be actively involved when you get there. You also need to think about the kind of things you're looking out for, and the ways in which you might want to record what you find. The key is preparation - balancing the need to structure what you find while staying open to the unexpected. This tool includes a quick checklist and a format to note down these findings.

This worksheet indicates some of the things you might want to record when shadowing. Don't be afraid to experiment - whether you're silently observing or actively involved will very much depend on each situation you're in. Fill out the worksheet for each person you follow. Ask your team to fill out a similar sheet for each person they follow. This is a structured way to compare your observations across the various 'participants' you and your team shadowed.

The observations you find relevant depend on the focus of your project. These could be about the people they meet, places they

go to, or how they organise their life. Feel free to customise the boxes on the worksheet - the ones here are examples to trigger some ideas.

It might be a good idea to ask a person's permission in case you want to follow them closely, though it is also possible to observe your participant from a distance. This may depend on what is socially accepted within the specific situation or culture. Please do respect the person's space and make sure they are comfortable. You don't want to break the natural flow of how they go about their everyday life.

Where & When	Likes	Dislikes	Habits
Who			
Key findings			
	Activities	Objects	Space



I want to collect input from others by defining my goals and the path to reach them

PEOPLE SHADOWING

Where & When LOCATION: DATE: TIME:	Likes eg.: observations on personal preferences	Dislikes eg.: observations on particular concerns	Habits eg.: observations on existing routines
Who PERSON SHADOWED: AGE: GENDER: REASON FOR SHADOWING:			
Key findings			
	Activities	Objects eg.: observations on the use of specific objects	Space eg.: observations on the effect of the environment
	eg.: observations on actions triggered by situation	eg.: observations on the use of specific objects	eg.: observations on the effect of the environment



I want to collect input from others in a conversation that uncovers their perspective

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INSPIRED B

INTERVIEW GUIDE LEVEL OF INVOLVEMENT



REQUIRES SOME DIALOGUE with colleagues/ peers. Plan for some time to interact and fill out in collaboration over a day maybe.

IDEO (2012) Develop an interview approach p58. In: Human Centred Design Toolkit.



What is it & why should I do it?

The easiest way to understand a person is to speak to them. Interviews are a way to connect with people; an opportunity to hear them describe their experiences in their own words. Speaking to people about their everyday lives can help you define and describe the problems they face, understand the environment they're part of, and even picture the ways in which you can reach them. Interviews can also act as evidence for why your work is needed or what impact your work is creating.

Getting what you want from an interview however can be harder than you think - what people say and what they actually do are often very different things. Establishing an in-depth understanding of a particular experience might take some time, and requires a series of questions and activities as part of a conversation. Even a short interview can provide a huge amount of information, with masses of material quickly piling up when you start speaking with several people. The **Interview Guide** acts like a checklist to help you prepare a game-plan for an interview.

PHOW TO USE IT

This worksheet is an example of how you can prepare your interview. Depending on the focus of the project, this can also contain other items.

There is usually a mix of practices as well as underlying motivations you want to explore. Focus your questions on asking 'What' and 'How' and then probe deeper into people's motivations by asking 'Why'.

You could follow this three step framework to structure your interview:

Open Up: Make the participant feel at ease with 'warm-up' questions they are comfortable with. (for e.g. Household demographics; Who does what in the household? Some recent anecdotes related to the topic.)

Go Broad: Prompt bigger, wider thinking on related issues that they may not normally address on a daily basis. (Aspirations for the future, How are things connected?)

Probe Deep: Dig deeper on the challenge at hand and prompt with challenging 'what if' scenarios.

There are various ways to elicit and document information during an interview. Make sure to prompt participants to be specific in clarifying their preferences and motivations. You may ask people to simply tell you, but you could also invite them to show things, or maybe make a drawing of particular practices they have (e.g. where is your favourite spot in the room? What is your favourite object in the house?)

Before you do the actual interview, it is wise to practice with your team to get a sense of how to frame the questions for better response. Also think about how you would use these interviews later. This is especially useful if several people will be conducting the interviews.

Show me	Draw it	
Think aloud		Be specific



I want to collect input from others in a conversation that uncovers their perspective

INTERVIEW GUIDE

Show me

If you are in the interviewee's environment, ask him or her to show you the things they interact with (objects, spaces, tools, etc). Capture pictures and notes to jog your memory later. Or, have them walk you through the process.

Draw it

Ask participants to map out their activities and experiences through sketches and diagrams. This is a good way to debunk assumptions and reveal how people perceive and order their activities.

Think aloud

As they perform a process or task, ask participants to describe aloud what they are thinking. This helps uncover their motivations, concerns, perceptions and reasoning.

Be specific

People often generalise about what's typical and leave out rich important details. Instead, ask people to talk about a specific period of time. Instead of what's your typical day like, ask them what happened yesterday.



I want to collect input from others by getting to the heart of what motivates people

QUESTION LADDER LEVEL OF INVOLVEMENT

INSPIRED B

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FAIRLY SIMPLE, SELF ADMINISTERED TOOL needs relatively less time.

Project Innovation (2012) Question. In: Social Innovation Toolkit.



What is it & why should I do it?

How do you know the right question to ask? Sometimes reaching the right answer means thinking more about the kind of questions you're asking. It might sound simple, but focusing on what you're asking someone is essential for reaching a deeper understanding. The **Guestion Ladder** is an interview technique that helps you to hone in on a certain topic by asking a series of questions about different aspects related to that topic.

This tool is a quick and easy way to start asking your questions in a few different ways, and to start combining questions in order to reach more complex answers. It provides a structured overview of what goes into a question; it shows how to combine a range of who, what, where, when, why and how questions coupled with the words like is, did, can, will, would and might. This makes it much easier to think about the best way to get to the heart of the issue at hand, and to build chains of questions that will allow you to gradually reach the heart of more complex issues.

PHOW TO USE IT

While making a questionnaire or before going for an interview, this worksheet can be used as a series of possible questions from which a final set can be chosen. Use this to practice approaching and exploring an issue through various directions.

Once you have gained some experience with using this technique, you might find yourself automatically using it in conversations or interviews you conduct with people.

	simple questions	cc	mplex questions			
	Is	Did	Can	Can Will		Might
Who	Who is	Who did	Who can	Who will	Who would	Who might
What	What is	What did	What can	What will	What would	What might
Where	Where is	Where did	Where can	Where will	Where would	Where might
When	When is	When did	When can	When will	When would	When might
Why	Why is	Why did	Why can	Why will	Why would	Why might
How	How is	How did	How can	How will	How would	How might



I want to collect input from others by getting to the heart of what motivates people

	SIMPLE QUESTIONS					
	Is	Did	Can	Will	Would	Might
	Who is	Who did	Who can	Who will	Who would	Who might
Who						
	What is	What did	What can	What will	What would	What might
What						
	Where is	Where did	Where can	Where will	Where would	Where might
Where						
	When is	When did	When can	When will	When would	When might
When						
	Why is	Why did	Why can	Why will	Why would	Why might
Why						
	How is	How did	How can	How will	How would	How might
How						

QUESTION LADDER

PRACTICAL TOOLS TO TRIGGER & SUPPORT SOCIAL INNOVATION Development Impact & You



I want to collect input from others to ensure my work is relevant to the people I'm working for

STORYWORLD

INSPIRED BY Julier J., Kimbell L. (2012) Storyworld. p24. In: The Social Design Methods Menu. LEVEL OF INVOLVEMENT

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MORE COMPLEX TOOL that should ideally be done over a few days. Given the strategic nature of the inputs/outputs, this needs consultations with seniors, peers and ideally needs to be revised after a first pass.



What is it & why should I do it?

Qualitative data collected through interviews and observations can be incredibly rich. A structured way of documenting this for analysis and communication is very important. The **Storyworld** tool provides a useful way to highlight the most relevant insights from your research. It helps you do this without being overwhelmed with details, showing you how to structure your documentation so that the discussions you have afterwards are in tune with the learning requirements.

The tool enables you to bring part of a person's world with you once you start designing a solution that is addressed to them. It allows you to create stories that make people easier to relate to - often closely matching the colour and complexity of somebody's everyday life. These stories can be key triggers to inspire creative ideas.

PHOW TO USE IT

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You can use Storyworld as an input for a creative workshop. Fill out the worksheet in advance, to provide a structured profile that is relevant to the topic. This offers a useful starting point for a brainstorm on ideas for new solutions.

You can also use Storyworld as a workshop activity by filling out the sections of the worksheet together with your team, while going through selected data from your research. This enables the team to develop a joint understanding of a person and his/her world.

In some situations you can even use Storyworld as a research

tool by taking the worksheet to an interview with someone. Together map out the different aspects of themselves and their life as part of your conversation. This works particularly well with active and creative research participants.

ofile	Context	Memorable	
	Connections and Relations	Objects and Places	quotes Notes on things that stood out
	Self		
	Perceptions	Aspirations	



I want to collect input from others

to ensure my work is relevant to the people I'm working for

STORYWORLD

Profile Add a picture or drawing that represents the person	Context		Memorable quotes
	Connections and Relations Who is this person connected to? How? (Include people and organisations)	Objects and Places What physical and digital objects is this person connected to? How, where and when?	
	Self		Notes on things that stood out
	Perceptions What does this person think or believe about themselves and the world around them?	Aspirations How does this person think about their involvement in change? What shapes this?	
NAME AGE GENDER			
FAMILY LIVING CONTEXT WORK			
PLAY			



CASE STUDY

TOOL USED: INTERVIEW GUIDE, QUESTION LADDER
ORGANISATION: iDE
COUNTRY: CAMBODIA
SECTOR: RURAL POVERTY REDUCTION
ROLE: INNOVATION LEAD
CONTACT PERSON: YI WEI
EMAIL: YWEI@IDE-CAMBODIA.ORG

We were devising an interview guideline to collect information on a certain group of government officials and whether they should be the recommended channel for implementing a social marketing campaign.

We needed to get honest feedback from them and those around them about how appropriate they were to serve this role.

WHY WE USED THE TOOL:

We used the Interview Guide and the Question Ladder tool in tandem to help us take stock - making sure we got all the possible questions out there first, then organising them according to the purpose of the question, and then finally by level of complexity.

HOW WE USED THE TOOL:

We used the tool as a guide to help organise our questions. The most helpful aspect was probably how the tool organised the questions according to complexity. In the Cambodian context, asking a question will most likely not get you the answer right away. Rather, you have to ask the same question in several different ways, and understanding which questions are most complex helped to remind us to ask questions as simply as possible first.

RESULTS OF USING THE TOOL:

We were able to ask questions as directly as possible without getting too complex in the beginning with more abstract ideas such as conditionals.



CONDUCTING A SURVEY WITHIN OUR VIDEO MANAGEMENT AND SOFTWARE TEAM WITH THE QUESTION LADDER TOOL.

Digital green uses ICT to curate and share best practices (in the form of videos created by agriculturists) among rural farmers in India.

The databases of these farming videos are created by our internal teams and their management is the most critical part of our work. Currently we use an internally developed technology for video management, that is not very user friendly and intensive on time and effort. We were trying to design an internal survey through which we wanted to know the problems currently faced by our staff in using the current tools.

WHY WE USED THE TOOL:

We used the Question Ladder tool because we wanted to construct some very specific questions as a warm-up and then move to open ended questions that would be complex but more revealing. The responses to this activity would help the software team understand how to make the internal video management activity more effective and efficient.

HOW WE USED THE TOOL:

We used this framework in the worksheet to design questions for an internal survey that we issued to internal programme teams to assess their process of entering data, uploading videos and mapping them. It worked very well because it was straightforward and we were able to design the questionnaire at many different levels of complexity, which we found opened up our line of questioning.

RESULTS OF USING THE TOOL:

We were able to design our survey in a more structured manner. Some example questions that we constructed are:

- Why is it important, or not important, for Digital Green to have a copy of all videos?
- In the future, who might want to create collections on our website?
- Is it likely that someone might forget to link an uploaded video's youtube id in COCO?



TOOL USED: QUESTION LADDER ORGANISATION: DIGITAL GREEN

SECTOR: ICT IN AGRICULTURE

ROLE: ASSISTANT SOFTWARE ENGINEER Contact Person: Nikita Dagar Email: Nikita@Digitalgreen.org

CASE STUDY

COUNTRY: INDIA



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I want to know the people I'm working with by clarifying relationships between stakeholders

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PEOPLE & CONNECTIONS MAP



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Namahn and Yellow Window Service Design, Design Flanders (2012) Stakeholder Mapping. In: Service design toolkit.

MORE COMPLEX TOOL that should ideally be done over a few days. Given the strategic nature of the inputs/outputs, this needs consultations with seniors, peers and ideally needs to be revised after a first pass.

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PEOPLE & CONNECTIONS MAP

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What is it & why should I do it?

The **People & Connections Map** is a quick and simple way to visualise exactly who you are trying to reach and how. It gives you an overview of all the different individuals and organisations involved in what you do. It allows you to develop a clearer picture of how all the different people and organisations relate both to your work and each other. These might include the people or communities you work directly with; the various bodies from which you receive (or are seeking) funding; or your own peers, local communities and even international support networks.

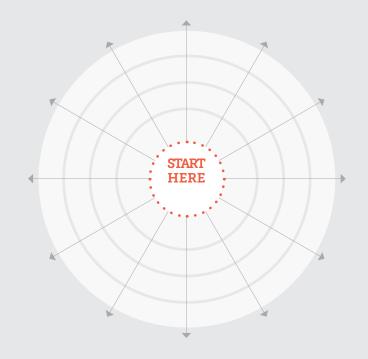
The People & Connections Map can be a great resource when sharing what you do and how it links together within the community of stakeholders that surround you. This tool is based on the orginal Stakeholder Spidergram developed by the Helsinki Design Lab, and further inspired by the Stakeholder Mapping tool by Namahn and Yellow Window.

PHOW TO USE IT

Start by noting down your target audience, including beneficiaries, users or customers who would benefit from your work, in the centre of the worksheet. Then work your way from the centre towards the outer layers, mapping other people and organisations that are related to the work you do. These could be people and organisations that are responsible alongside you for implementing or delivering your work.

By organising the people and organisations that are related to your work across the concentric circles, you can indicate which of them are closer or farther away from the target audience. The closer to the core, the more influential they are. The closer to the outside, the farther away they are. In addition it helps to further organise the people and organisations on the map by clustering them in sections that express specific networks, sectors or interest areas. For instance a section with all the people and organisations involved with health, safety, environment or education. Choose sections that are relevant to your situation.

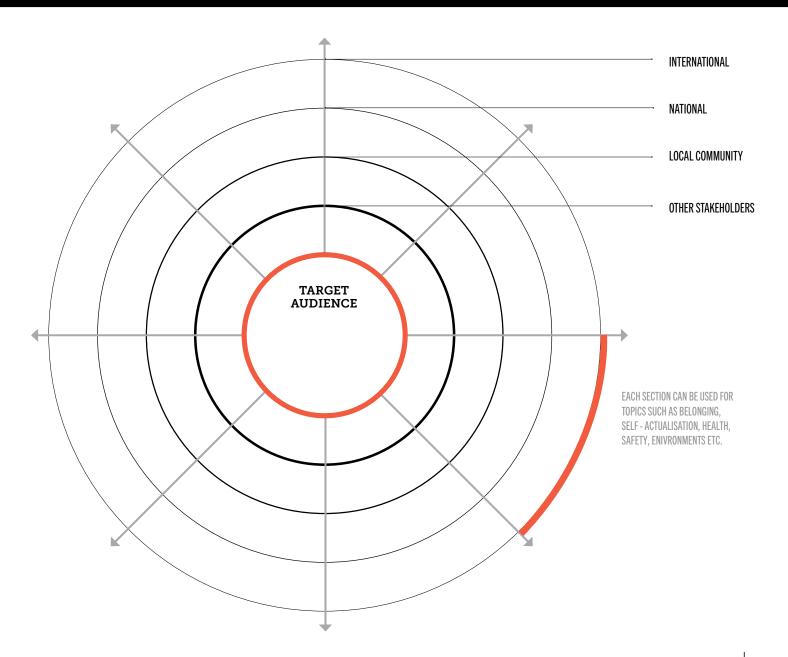
Once the worksheet has been filled, go through each person and organisation on the map with your team and, if necessary, reposition them into the circle and section that the team agrees fits most. This review will give you a useful starting point to discuss which relationships or connections are key, and which may need extra attention. By clearly marking out these fields in the map you can highlight and communicate the main focus for your work.





I want to know the people I'm working with by clarifying relationships between stakeholders

PEOPLE & CONNECTIONS MAP





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I want to know the people I'm working with by better defining who I am trying to reach

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TARGET GROUP

INSPIRED BY

Nesta (2009) Worksheet 3a: Your Customers. In: Creative Enterprise Toolkit.

LEVEL OF INVOLVEMENT

O D 8 MORE COMPLEX TOOL that should ideally be done over a few days. Given the strategic nat

done over a few days. Given the strategic nature of the inputs/outputs, this needs consultations with seniors, peers and ideally needs to be revised after a first pass.



What is it & why should I do it?

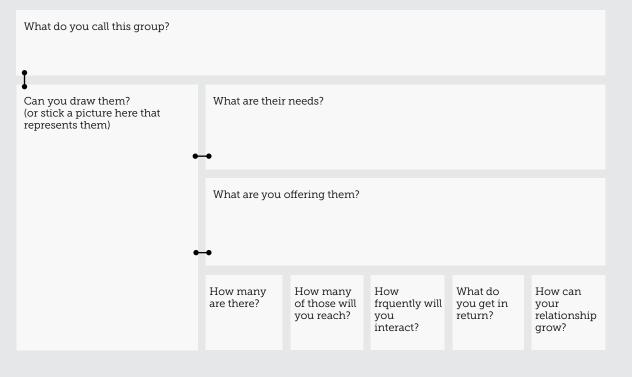
How to gain better insight into the groups of people you want to cater to, and the kind of needs they have, is a fundamental question for every project or organisation. This tool is a quick and easy way to work out an overview and develop an understanding of the different people your work might reach, and the resources you need to do so.

Target Group is probably best used when you are trying to work out some initial ideas about who you want to cater to, and why. It is also a nice and effective way to share this information with others.

PHOW TO USE IT

Fill out the worksheet by considering the needs of the people or organisations you are catering to. Continue with adding notes to describe the potential groups that may be interested in your work, or who may benefit from it. Also try to think about other people or organisations who might also benefit from, or have interests/ needs that can be connected to your work. These could be different from your customers.

You can fill out different worksheets for different groups. By using this worksheet you can build a picture of the potential groups of beneficiaries. Do try to also fill out the more exact fields at the bottom. This will help you to get a more concrete sense of the figures involved. It is useful to add names or brief descriptors for each of the beneficiary groups. If you don't have a name already, think of one that represents the group in a useful way for your organisation. Naming these groups makes it more easy to discuss with your team or other stakeholders. You can do this informally, for instance with friends or colleagues. You can also do it more formally, as part of a meeting with partners or investors. Ideally you could also talk to your customers and other beneficiairies who are in contact with your work, so you can check your assumptions.





TARGET GROUP

What do you call this group?						
•						
•	7					
Can you draw them? (or stick a picture here that represents them)		What are their needs?				
		•				
		What are you offering t	them?			
		_				
		•				
		How many are	How many of	How frequently	What do you get	How can your
		there?	those will you reach?	will you interact?	in return?	relationship grow?



I want to know the people I'm working with by visualising their key characteristics

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INSPIRED BY

PERSONAS

Business Design Toolkit (2010) Personas.

LEVEL OF INVOLVEMENT

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REQUIRES SOME DIALOGUE with colleagues/peers. Plan for some time to interact and fill out in collaboration over a day maybe.



What is it & why should I do it?

Personas are portraits of fictional but realistic individuals that are used as a common reference point to communicate particular groups in your intended audience. Personas are created by drawing together the characteristics of similar people - their behaviours, motivations and the like - into one 'archetype' through which the group can be understood. By creating a fictional character to embody these characteristics, you don't lose the little details that make someone the person they are. In this way, Personas help ensure that your work stays focused on people, rather than an abstract description of the group they are said to represent.

Developing successful Personas is all about knowing what to put in, and what to leave out. They're often developed from a range of different sources, each of which might contain huge amounts of detail. The trick is to recognise the common characteristics that could form the basis of a Persona, and what selection of personal details to include in order to bring this 'to life'. Doing this right can be hugely beneficial as it lets you brainstorm ideas and test potential solutions from their perspective. Often its handy to create a number of Personas so that you can focus on the key characteristics of each subgroup of your intended audience.

PHOW TO USE IT

Personas represent different target subgroups that an organisation wants to reach out to. Being aware of the different preferences, routines and motivations these different Personas have, can help you customise your products and services to these specific subgroups.

Use the worksheet to compile a portrait of a typical person that could represent one of the Personas your organisation is targeting. Try to make the Persona as close to a typical person as possible

by adding a name and a picture and descriptions of interests, skills and motivations.

Feel free to add any other details that are relevant to your situation and in relation to this Persona.

ADD PICTURE OR DRAWING	Who am I?	3 reasons for me to engage with you 1. 2.		3 reasons for me not to engage with you 1. 2.	
Persona name: Audience segment:		3.		3.	
My interests	My personality	My skills	My dream	ms	My social environment



PERSONAS

	Who am I?	3 reasons for me to engage with you	3 reasons for me not to engage with you
		1.	1.
ADD PICTURE OR DRAWING		2.	2.
Persona name:		3.	3.
Audience segment:			

My interests	My personality	My skills	My dreams	My social environment



I want to know the people I'm working with by defining how my offering is new to them

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PROMISES & POTENTIAL MAP LEVEL OF INVOLVEMENT



IDEO (2011) Deliver: Plan a pipeline of solutions, p135. In: IDEO, Human Centered Design Toolkit. Edition - 2. London: IDEO.

REQUIRES SOME DIALOGUE with colleagues/peers. Plan for some time to interact and fill out in collaboration over a day maybe.

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PROMISES & POTENTIAL MAP

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What is it & why should I do it?

The **Promises & Potential Map** is a simple way to define your added value by mapping the relationship between what you do and who you do it for. The tool provides a diagram on which you can plot each idea or solution you are developing, whether it is targeted at people you work with already, or people you'd like to start reaching out to. Each idea is also classified as being completely new, or something that builds upon what you do already. In this way any potential new solutions you develop are mapped alongside the promises you've already made - and you can see how both relate to the people who might be affected.

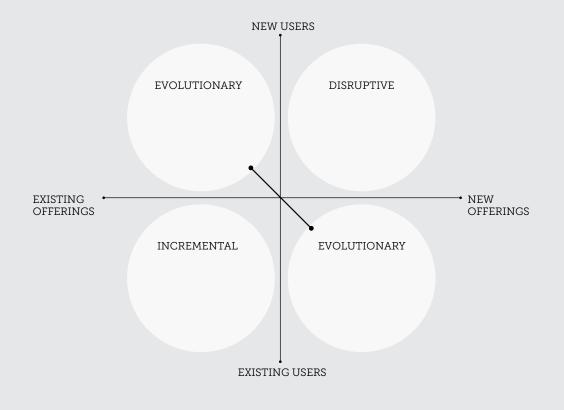
Sometimes mapping things out in this way is useful for understanding how much work - and how much benefit - a potential solution might bring. In this worksheet, which has been inspired by Users & Offerings (IDEO 2011), you can map which ideas and offerings are radically new and which are based on existing ones.

PHOW TO USE IT

For both axes independently, first decide where a specific offering by you or your organisation is positioned. Is it a new or existing offering? Is it for new or existing users? Then find a spot on the map where these two positions cross - that is where you place the particular idea.

Depending on where your offering ends up, you'll get a sense of whether it is disruptive or building on something existing i.e. incremental. This can help to understand whether you are taking a high risk by doing something radically new, or a low risk by building on what is already there. Your offering can have several sub-offerings, and each of these can represent a different position on the map. Using the tool gives you a sense of the spread of your portfolio.

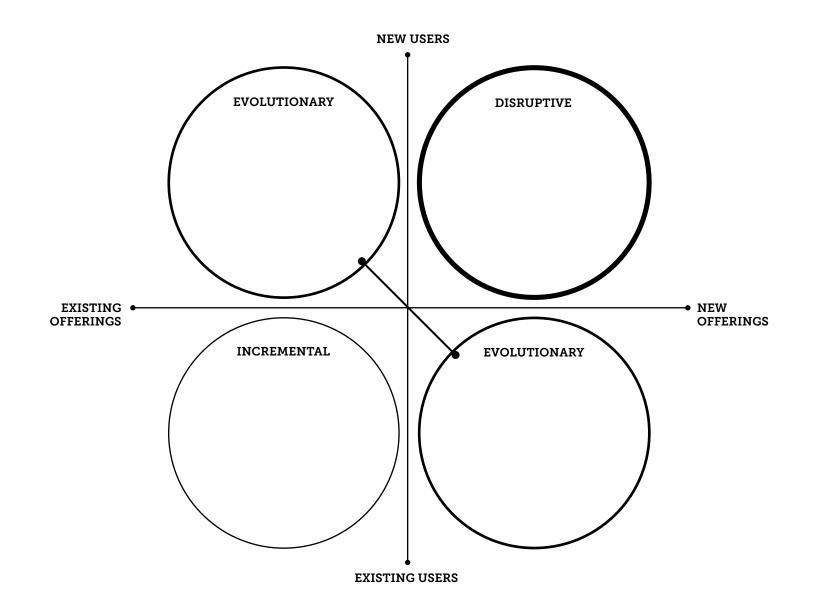
This can be potentially used as an interesting way to brainstorm ideas - and help you prioritise them into a product development pipeline for your organisation.





I want to know the people I'm working with by defining how my offering is new to them

PROMISES & POTENTIAL MAP





CASE STUDY

TOOL USED: TARGET GROUP, PERSONAS ORGANISATION: UNDP UZBEKISTAN COUNTRY: UZBEKISTAN SECTOR: COMMUNITY OUTREACH / EDUCATION ROLE: COMMUNITY OUTREACH SPECIALIST PROJECT: UNDP/UN VOLUNTEERS JOINT PROJECT 'SOCIAL INNOVATION AND VOLUNTEERISM IN UZBEKISTAN CONTACT PERSON: ANDREAS KARPATI EMAIL: ANDREAS.KARPATI@UNDP.ORG

Development Fund of Children's Sport Under the Ministry of Public Education in Uzbekistan was concerned that despite a large-scale investment programme into sports complexes, the use of these facilities has been below expectations, especially outside Tashkent (the capital of Uzbekistan).

The Children's Sports Fund is particularly concerned about the participation of girls from rural areas in sports, who often miss out on the benefits of doing sports due to a lack of parental awareness, encouragement or even permission.

So, despite major investments into infrastructure and programmes guaranteeing free access to sports facilities, how do we get people to use the facilities?



TARGET GROUP AND PERSONAS WORKSHEETS FILLED BY THE WORKSHOP PARTICIPANTS.



WHY WE USED THE TOOL:

We organised a workshop on social innovation with young citizens - students from a local partner university, focused on the 'sport for social inclusion'. Promising project proposals that come out of this, were eligible to be considered for a small grant award of up to \$1,500. While making these project proposals, we used a number of tools such as Target Group, Personas to think about the users and Problem Definition, Causes Diagram to think about possible problems and solutions.

The tools were chosen along three main criteria:

- 1. Suitability for small-scale volunteer projects without commercial elements.
- 2. Applicable for the early, pre-prototyping stage of social innovation process (emphasis on ideation, problem definition, working out users).
- 3. Can be carried out in less than an hour in a classroom/workshop setting.

HOW WE USED THE TOOL:

The Target Group and Personas tools were helpful in making the students think about the detailed characteristics of their future users. They often talked about 'heads of traditional families' for example, but the tools helped them to anchor such generalisations in concrete characteristics: where are they to be found, what do they do on an average day, what concrete values do they hold, what media do they consume, what is their relationship with modern technology, etc. We used this tool to highlight the characteristics of our target customers by 'putting ourselves in the other person's shoes.' We realised that no problem can be solved without taking into consideration the personality of people, their needs and a holistic picture of their lives.

RESULTS OF USING THE TOOL:

We realised that no problem can be solved without taking into consideration the personality of people, their needs and a holistic picture of their lives.

Tips for other people:

- It is better not to concentrate on one type of personality for the Personas tool and instead create multiple Personas, because the problem can cover different social groups.
- Its wise to prepare and collect some data before using the Target your Audience tools in a workshop setting.



CASE STUDY

TOOL USED: PERSONAS ORGANISATION: UNDP KOSOVO COUNTRY: KOSOVO SECTOR: LOCAL GOVERNANCE ROLE: PROJECT MANAGER, SOCIAL MEDIA FOR INNOVATIVE LOCAL EMPOWERMENT CONTACT PERSON: LEJLA SADIKU EMAIL: LEJLA.SADIKU@UNDP.ORG FURTHER INFORMATION: HTTP://WWW.UNDP.ORG/CONTENT/KOSOVO/EN/HOME/OPERATIONS/ PROJECTS/DEMOCRATIC GOVERNANCE/SMILE.HTML

My team and I are working on a project seeking to build bridges between decision makers and young people.

One such project with UNWomen, involves a series of discussions on Twitter with female role models in politics. One predicament for us is that of understanding our audience better and being specific about who we are trying to reach through these interventions. And hence we used the Personas tool.

HOW WE USED THE TOOL:

We workshopped the tool with 6 people for 2.5 hours. Everyone worked individually in constructing a persona with very little moderation. Through the exercise we quickly established that we needed to engage with people outside of our digital audience; a wider group of activists and students working on gender issues that we don't normally interact with. In smaller municipalities people are far less conversant with Twitter and so we identified a real need to engage users through other methods, Facebook for instance, or even Twitter Lunch Cafes - where people people can come together in an offline space and be assisted in bringing their issues to a virtual discussion.

RESULTS OF USING THE TOOL:

The tool was extremely useful in helping us narrow down our core audiences for this initiative and to understand some of the obstacles that they might face in joining an online discussion.

We gained more clarity about our outreach activities needing to blend offline and online events, and how a part of it should start with universities and spread through student governments.



I want to generate new ideas by working together with people who experience and solve problems

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CREATIVE WORKSHOP LEVEL OF INVOLVEMENT

INSPIRED BY

Lovlie L., Reason B., Polaine A. (2013) Service Design: From Insight to Implementation. p60. Rosenfeld Media

REQUIRES SOME DIALOGUE with colleagues/peers. Plan for some time to interact and fill out in collaboration over a day maybe.

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What is it & why should I do it?

A **Creative Workshop** is an opportunity to bring together and collaborate with a number of different people involved with or affected by your work. They might include the people you're trying to reach, the partners you're working with, experts brought in from similar fields, or any combination of these (and other) groups who would benefit from talking to each other. It is a good way to both collect and share different experiences, as well as co-create potential solutions.

Creative Workshops can provide invaluable insights into people's perspectives on particular issues. And they offer a setting where this knowledge is shared as soon as it's gathered. Structuring sessions that involve different people from several different backgrounds however is something that needs careful planning. This tool provides a checklist for planning your session effectively, helping you make the most of the group dynamics.

PHOW TO USE IT

Creative workshops can have different purposes:

- Generating and exploring a range of ideas
- Selecting and building upon the best ideas
- Creating a clear vision for how the ideas can be made real at a later stage

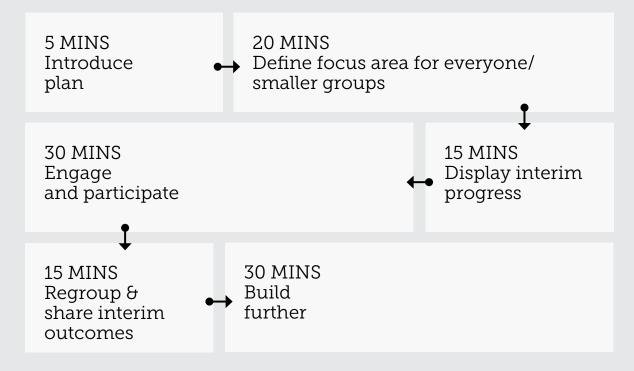
A clear step-by-step schedule of activities, and timings for each activity will help make the workshop a success. It is important to plan your workshop well.

Here are some points to consider while planning one:

- How long will the workshop be, and where will it take place?
- Who will attend the workshop, and what is the mix of knowledge and skills?

- What will be the schedule for the day?
- Will you be working in small groups? How will they share their ideas?
- What materials and tools are you intending to use?
- How will you document the results?

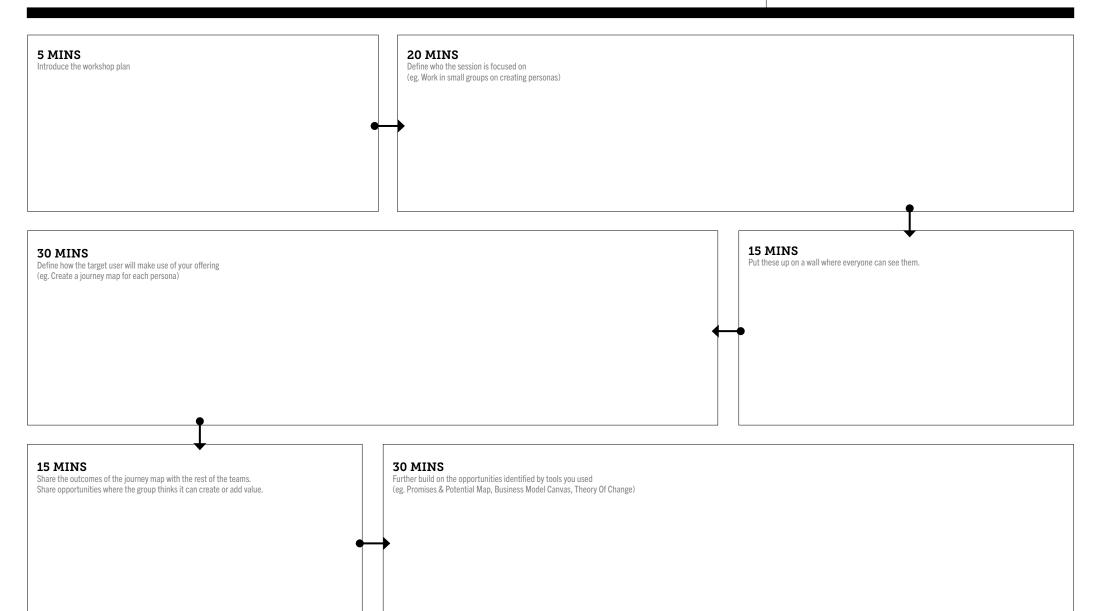
The following worksheet is only one example of how a Creative Workshop can be conducted. Depending on your needs/constraints, feel free to modify (add/subtract/reorder) each time you plan a workshop.



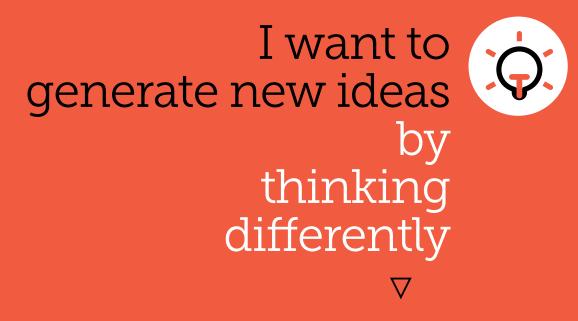


CREATIVE WORKSHOP

I want to generate new ideas by working together with people who experience and solve problems







FAST IDEA GENERATOR LEVEL OF INVOLVEMENT

INSPIRED BY Nesta (2013) Fast Idea Generator

FAIRLY SIMPLE, SELF ADMINIST<u>ered tool</u>

needs relatively less time.

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PRACTICAL TOOLS TO TRIGGER & SUPPORT SOCIAL INNOVATION Development Impact & You



What is it & why should I do it?

PHOW TO USE IT

Step 1 is to start from an existing concept, problem or opportunity and then apply the seven challenges suggested in the worksheet. These are simple steps to help come up with alternatives that bend, break and stretch the 'normal rules' in such a way that you can generate many surprising ideas in a short period of time. **Step 2** is then to review the ideas and select the best ones to further flesh them out into workable innovations.

This tool allows a team to generate ideas by looking at a problem or opportunity from a range of perspectives. This helps come up with new ideas for potential solutions, and also strengthens current offerings, as it challenges it from different approaches. Comprised of seven approaches, or challenges, you can choose the ones that seem most applicable to take the topic at hand further, thus using the tool to inspire further discussions.

The **Fast Idea Generator** helps frame ideas, problems or opportunities in relation to different scenarios. It stretches the thinking around a concept in different directions, providing a stimulating discussion that will further strengthen the concept. To use the tool effectively, the starting point (problem, opportunity, concept idea or existing proposition) should be clearly laid out.

THE APP	PROACH		++++++++++++++++++++++++++++++++++++++	BENDING, BREAKING & STRETCHING THE RULE
	Inversion	Tum common practice upside down	↔	→
J	Integration	Integrate the offer with other offers	•	•
	Extension	Extend the offer	↔	↔
0	Differentiation	Segment the offer	•	•
0	Addition	Add a new element	•	•
0	Subtraction	Take something away	•••	•
C	Translation	Translate a practice associated with another field	•	•
g	Grafting	Graft on an element of practice from another field	•	•
\odot	Exaggeration	Push something to its most extreme expression	•	•



I want to generate new ideas by thinking differently

FAST IDEA GENERATOR

THE APPROACH			ENDING, BREAKING & TRETCHING THE RULE
Inversion	Turn common practice upside down	Doctors treat patients	hat if patients became doctors?
Integration	Integrate the offer with other offers	People access a range of services in different locations Wh	hat if different local services had one point of access?
Extension	Extend the offer	Schools provide learning opportunities to children and young people during the day	hat if schools also offered sport and recreation; and community learning after hours?
Differentiation	Segment the offer	There is a 'one size fits all' approach	hat if a service was personalised and differently segmented?
Addition	Add a new element		hat if supermarkets delivered groceries and also provided hot meals to older people in their mes?
Subtraction	Take something away	Prisons are critical to an effective criminal justice system	hat if you had to close three prisons?
T ranslation	Translate a practice associated with another field	Hospitals and airports are different kinds of operations	hat if airport management practices were applied to hospitals?
Grafting	Graft on an element of practice from another field	Teaching and coaching are separate practices	hat if coaching was introduced as part of secondary school education?
Exaggeration	Push something to its most extreme expression	Schools support children and young people to learn, but only within designated times and in a designated space	hat if students could access learning, anytime and anywhere they chose?



I want to generate new ideas by framing a constructive discussion with my team

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THINKING HATS LEVEL OF INVOLVEMENT

INSPIRED BY and Company.

de Bono, E. (1985) Six Thinking Hats. USA: Little, Brown and Company.

REQUIRES SOME DIALOGUE with colleagues/peers. Plan for some time to interact and fill out in

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collaboration over a day maybe.

PRACTICAL TOOLS TO TRIGGER & SUPPORT SOCIAL INNOVATION Development Impact & You



What is it & why should I do it?

Thinking Hats allow a range of different viewpoints and perspectives to be brought into a discussion, whilst keeping the focus on the issue at hand. It's a technique which can be used to encourage people to look at a topic from a number of different perspectives, making what might be a very complex issue, a stimulating focus point for conversation. The team learns how to separate thinking into six clear functions and roles, getting them to look at all sides of an issue. Structuring the conversation around these different viewpoints helps avoid endless, free flowing debates around topics, and instead helps create a meaningful, focused discussion. This technique was popularised in the book Six Thinking Hats (De Bono E. 1985).

Each hat is a different theme, which indicates a particular viewpoint. In a group setting all team members think about a topic using the range of hats, helping them focus on the topic one viewpoint at a time. This also helps getting contributions from all team members. The range of viewpoints can uncover new ways to address a particularly difficult problem, for instance by making an overly familiar issue feel 'strange' again, and it helps teams develop a shared understanding.

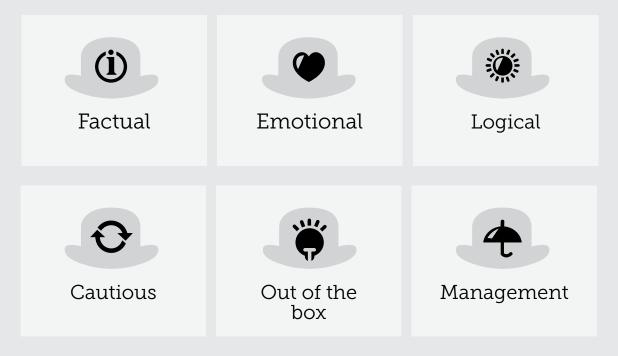
PHOW TO USE IT

There are two ways of using the Thinking Hats: **1**. Everyone 'wears' the same hat at the same time. Choose one of the hats and ask everyone to contribute to the discussion from that hat's point of view. Each of the six hats is used to discuss an issue. **2**. Everyone 'wears' a different hat and the topic is discussed from multiple points of view. All hats need to contribute sufficiently to the discussion. Hats can be switched around during the discussion, forcing people to look at the issue differently.

Both approaches help teams engage in critical discussions. The hats break-up the conversation into focused parts that can be conducted one after the other, instead of simultaneously. There is no correct order for which hat comes first or last, but for the first few times, it may be easiest to use the sequence as indicated on the worksheet (from factual to management).

The use of these hats may seem artificial at first, but once you go through the exercise a few times, the advantage becomes evident.

If 'hats' are not appropriate for the situation just use T-shirts, badges, or cards with the themes of the hats on them.





I want to generate new ideas by framing a constructive discussion with my team

THINKING HATS

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FACTUAL	EMOTIONAL	LOGICAL	CAUTIOUS	OUT OF THE BOX	MANAGEMENT





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INSPIRED BY

VALUE MAPPING

Nesta (2009) Worksheet 2a: Your Values. In: Creative Enterprise Toolkit.

LEVEL OF INVOLVEMENT

FAIRLY SIMPLE, SELF ADMINISTERED TOOL needs relatively less time.



What is it & why should I do it?

What makes you do what you do? **Value Mapping** helps you answer this by enabling you to describe the values which are embodied in your personal work and in the wider organisation. These values are probably more influential than anything else in shaping what you do. They might be something that you take for granted, that you think is obvious, or that you've never actually articulated or written down. Defining these values however can be very useful when trying to explain your work to other colleagues and partners.

Once the values are defined, they can be shared and act as a common reference point that simplifies and speeds up decisions, whilst also ensuring consistency in the work that you do. This is a seemingly simple task, but one which can be hugely valuable when done properly - something this worksheet helps you do. It can be especially useful to bring all team members on the same page during projects by having the team first make their personal value maps and then match these with each other.

PHOW TO USE IT

Start by individually writing down on a piece of paper or a series of cards, what you feel is most valuable for yourself as well as for the organisation. Think of these personal values as the things that make you feel truly alive and passionately committed to what you are doing in your organisation. For one person it might be things like helping others, for another it might be creativity or innovation, for someone else it might be honesty, ecological awareness or leadership. Write down a lot of them – even the ones that you are aware of but are less important to you.

When you have noted down a wide range of values (ten or more), place them in the relevant fields on the worksheet. Don't worry about getting it right first time – swap them around until you have them in the right place. To focus your activities, have a maximum of five in the 'Always important' column.

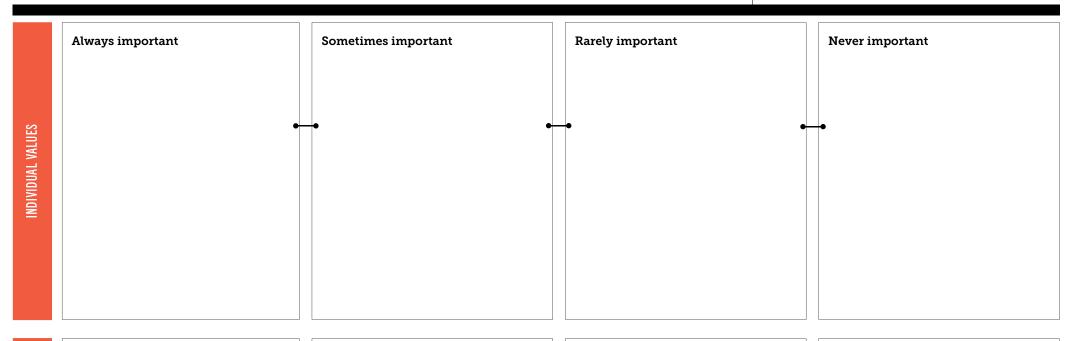
Ask your other team members to do the same. Once all their worksheets have been defined, these can be shared and agreed upon. Showing your completed worksheet to someone who knows you well and asking for their feedback helps clarify what is important to you. Together you can establish what values are important to the organisation as a whole.

Always important	Sometimes important	Rarely important	Never important				
	INDIVIDUAL VALUES						
Always important	Sometimes important	Rarely important	Never important				
ORGANISATION VALUES							



I want to generate new ideas by aligning our work based on shared values

VALUE MAPPING



	Always important	Sometimes important	Rarely important	Never important
S	•	• •	• •	•
ORGANISATION VALUES				
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CASE STUDY

TOOL USED: SWOT ANALYSIS, PERSONAS, THINKING HATS ORGANISATION: HUMANITARIAN STREETMAP COUNTRY: INDONESIA SECTOR: OPEN DATA CONTACT PERSON: KATE CHAPMAN EMAIL: KATE.CHAPMAN@HOTOSM.ORG FURTHER INFORMATION: HTTP://EN.OPENSTREETMAP.OR.ID/

> We were writing a grant proposal for the Australia-Indonesia Facility for Disaster Reduction (AIFDR) to secure new funding for our 2014 activities. For this, we held an internal strategy meeting that inputs into a larger workshop with partners and stakeholders to solicit feedback on our 2014 plan.



WHY WE USED THE TOOLS:

Our intent was to brainstorm both how we can better service people and groups we currently work with and if there are new ones we have not thought about. Often in such situations, it is easy to get caught in the same line of thinking and not imagine new methods of outreach to different groups. I thought that the Personas and the Thinking Hats would be good ways to do that.

I used the SWOT Analysis also because I felt that I knew my views on our strengths and weaknesses, but not necessarily my team's views. Having a firm understanding of how things stand from someone executing our programme tasks directly is vital.

HOW WE USED THE TOOLS:

In a 5 hour long workshop, we broke into small groups to work through each of the tools and then re-convened to amalgamate our thoughts and sprinkle the new perspectives into elements of the grant proposal. Generally the group work was very positive and hugely beneficial to bring the team together in this manner – more fun than the typical brainstorming we do.

The SWOT Analysis worked really well with the team. After this we used the Personas worksheet - which was especially helpful. We are trying to figure out what changes need to be made to our programme to reach a wider audience, so we tried a couple of personas that weren't our current "customers" and got some great ideas.

With the Thinking Hats though, we hit a bit of trouble. Some of it might have been my explanation. I think if I do it again I would translate the names of the different hats into Indonesian first. Everybody in the team speaks English, but the concept was a bit abstract for them.

RESULTS OF USING THE TOOL:

The activity resulted in clear inputs that were assimilated into a co-written grant proposal. Looking deeper, we have a better sense of some internal processes that we can use to advance our planning documents with our staff and board – so that we can be more intentional about our innovation practice.

Tips for other people:

Culturally adapt the tools to accommodate for varying degrees of English proficiency.



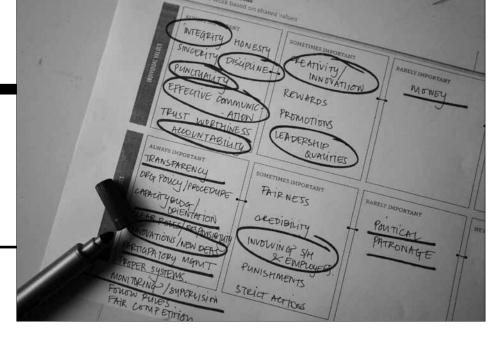
CASE STUDY

TOOL USED: VALUE MAPPING ORGANISATION: FHI 360 COUNTRY: INDIA SECTOR: PUBLIC HEALTH, NUTRITION AND WASH ROLE: TEAM LEADER CONTACT PERSON: SUBBANAICKER KRISHNASWAMY EMAIL: SKRISHNASWAMY@MPTAST.ORG

I lead a team of professionals providing Technical Assistance and Support to the Govt of Madhya Pradesh covering the thematic areas of health, nutrition and WASH (Water, sanitation and hygiene). I feel that there are several critical issues that come in the way of effective and efficient management of service delivery, often pushing the actual goal of social development to the background. Broadly classified into two categories - individual and organisational, these issues can be notions of governance, human resource and organisational development.

WHY/HOW WE USED THE TOOL:

I used the Value Mapping tool for identifying core values at the individual and organisational level that can bring a much wanted change in the way the whole system operates. The idea was to try out 'change management' in the system so that the resources are used productively to deliver services like basic health, nutrition and sanitation to the people we cater to.



A SNAPSHOT OF THE VALUE MAPPING TOOL FILLED OUT WITH THE TEAM

One of the problems we face is the resistance to change, and how the organisation is used to the 'status quo'.

My team drew up an annual work plan covering human resource and organisational development dimensions. Compartmentalising these values into four neat boxes is easier said than done, but in reality they all overlap both at the individual and organisational level. These values change with the personalities occupying the positions at the policy making level and the professionalism of the individual players who are responsible for driving the change.

RESULTS OF USING THE TOOL:

After the exercise, the outputs were shared with the government (who we work very closely with) and we are initiating a buy in from their side.



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I want to test & improve by understanding what is most effective in my work

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IMPROVEMENT TRIGGERS LEVEL OF INVOLVEMENT

INSPIRED BY Eberle, B (1997) Scamper Worksheet. USA: Prufrock Press.

FAIRLY SIMPLE, SELF ADMINISTERED TOOL needs relatively less time.

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23 DIY IMPROVEMENT TRIGGERS

What is it & why should I do it?

PHOW TO USE IT

Each of the questions on the worksheet should give a slightly different perspective on your work. Note your answers in the space provided, but try to keep it brief - the idea is to end up with something that will give you a concise overview of how your work is different, and how you could potentially improve it.

The questions on this worksheet are examples to trigger your thinking. Many other questions may be relevant as well. The key is to use the seven categories of questions to provoke thoughts on potential improvements.

Improvement Triggers provides a collection of questions which can be used to help you look at your work a bit differently. Inspired by the tool 'SCAMPER' (Eberle B. 1997), these questions are designed to provoke you into new ways of thinking, and are structured in a way that lets you approach either your existing offering or a potential new solution from a number of directions. This is a great way to make your work stronger, especially in areas where lots of competing solutions are already available.

The questions in this tool assume that anything new is a modification of something that already exists. This might not always be strictly true, but approaching your work from this perspective can very be useful when you're trying to articulate how what you're doing is different from anyone else (or how it builds on what's gone before).

Substitute Substitute Combine Adapt Adapt Modify Put to another use Put to another use Fliminate

Reverse



I want to test and improve by understanding what is most effective in my work

IMPROVEMENT TRIGGERS

Substitute	Combine	Adapt	Modify	Put to another use	Eliminate	Reverse
What materials or resources can you substitute or swap to improve your work? What other process materials could you use? What rules could you substitute?	What would happen if you combined different aspects of your work, to create something new? What if you combined purposes or objectives? What could you combine to maximise the uptake of your work? How could you combine talent and resources to create a new approach?	How could you adapt or readjust your work to serve another purpose or use? Who or what could you emulate to adapt your work? What other context could you put your work into? What other products or ideas could you use for inspiration?	What could you add to modify your work? What could you emphasise or highlight to create more value? What element of your work could you strengthen to create something new?	Can you use your work somewhere else? Who else could benefit from your work? How else could you do your work - perhaps in another setting? Could you reuse some ideas/things from a previous project?	How could you streamline or simplify your work? What elements of your work could you make more fun? What elements of your work or even rules could you eliminate? What could you have in its place?	What would happen if you reversed your process or sequenced them differently? What if you did the exact opposite of what you're trying to do now? How can you re-organise your work?



I want to test & improve by collecting useful feedback on my work at different phases

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LEVEL OF INVOLVEMENT

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collaboration over a day maybe

REQUIRES SOME DIALOGUE with colleagues/peers. Plan for some time to interact and fill out in

INSPIRED BY Nesta (2011) Prototyping in Public Spaces.

PROTOTYPE TESTING PLAN

24 DIY PROTOTYPE TESTING PLAN

What is it & why should I do it?

Prototyping is something we all do in our daily lives when we try out new things - from trying out new recipes while cooking to trying out different routes while going somewhere - it simply involves trying out an idea to see how it can be improved. At work however, prototyping is more than just 'trying out'; it is a structured way to check that you have an efficient and fitting solution or approach before rolling it out or making a big investment in it.

The **Prototype Testing Plan** gives a basic, but useful overview of the different ways in which you can test your work, as well as when to test it. You can build a prototype using various materials, or simply draw or act out your idea. The Prototype Testing Plan also helps structure the testing process. It is most efficient if you go through a structured series of steps. This way you can continually improve your work, while avoiding getting lost once feedback collected starts piling up. The worksheet indicates two periods when it is usually beneficial to test your idea: in the early stage of development, and in the later stages just before full implementation.

PHOW TO USE IT

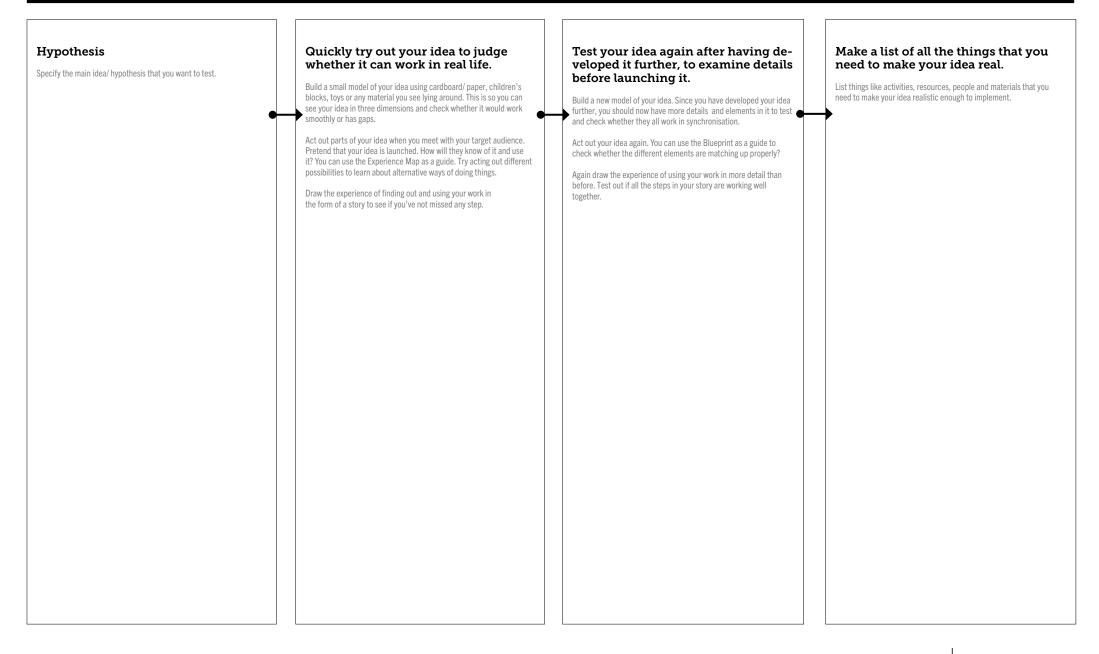
Prototyping is often carried out in various stages of a process with the aim of either searching for new ideas or testing an existing idea to see whether it works and how to make it better. Prototypes can be made as often as possible. The key is to keep it easy and cheap to build, focusing more on the core offering rather than smooth finishing. Feel free to use what is easily available around you as long as it helps you try out your idea rather than just talking or thinking about it. Use the worksheet as a basic guide to help plan your prototype tests. Always clearly specify the main idea you want to test out through your prototype. Make sure to note down any learnings on how to improve your work by reallocating activities, resources, people or materials.



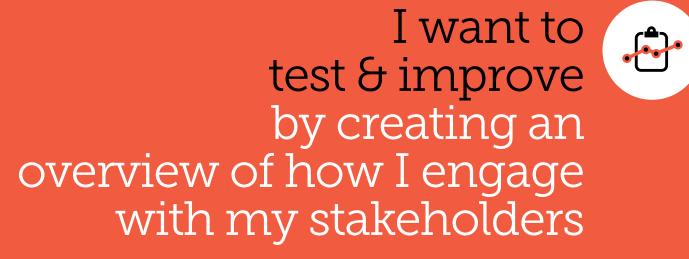


I want to test and improve by collecting useful feedback on my work at different phases

PROTOTYPE TESTING PLAN







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EXPERIENCE MAP

INSPIRED BY

Schneider J., Stickdorn M., (2010)The Customer Journey Canvas. In: This is Service Design Thinking. Amsterdam: BIS Publishers.

LEVEL OF INVOLVEMENT

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REQUIRES SOME DIALOGUE with colleagues/peers. Plan for some time to interact and fill out in collaboration over a day maybe.



What is it & why should I do it?

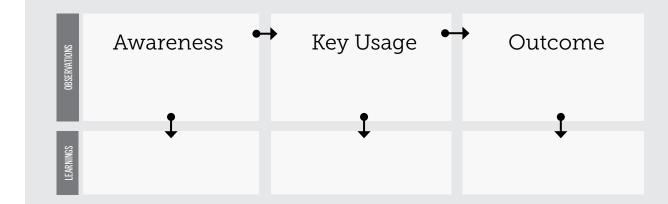
The **Experience Map** allows you to see your work through the eyes of the people receiving, benefitting or even funding it. It lays out the different routes and points at which these people become aware of, connect with, and feel about what you do - especially at the points they come directly in contact with your work. Identifying these junctures, and highlighting the interactions, helps you reflect on how you engage with these people and take your work further.

The worksheet provided here shows how you can quickly define the points which determine different people's perception of what you do - as well as the problems and opportunities each of these moments represent. A completed Experience Map is a way to condense complex information into a format more easily understood, through highlighting key points of your offering.

PHOW TO USE IT

Use the worksheet to document experiences from people who have been in contact with your work. Fill out one worksheet per person you have spoken with - the most rich information on this tends to come from interviews.

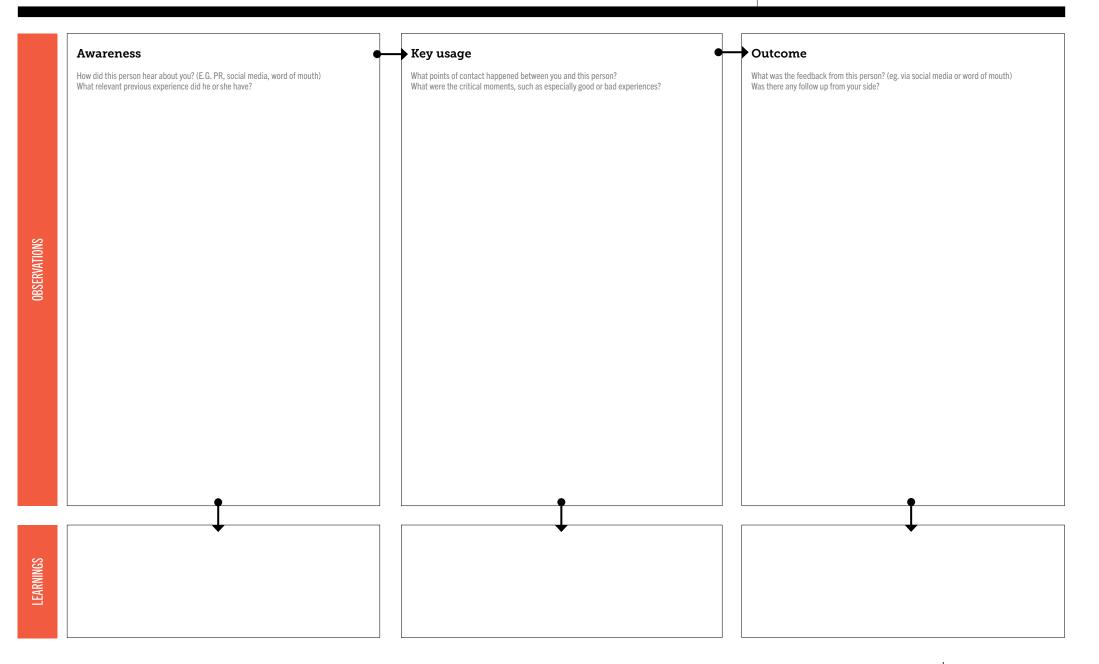
Capture their activities as well as their motivations and satisfaction. Be sensitive to 'why' as much as to 'what' and 'how'. Once you have collected a series of Experience Maps based on accounts from various people, you can make comparisons across this set to conclude what recurrent issues people have in the expectations and experiences with your service. Using this tool makes the process of testing more efficient, and improves the quality of how people experience your work.





I want to test and improve by creating an overview of how I engage with my stakeholders

EXPERIENCE MAP





I want to test & improve by crafting a detailed overview of our operations and resources



BLUEPRINT LEVEL OF INVOLVEMENT

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-REQUIRES SOME DIALOGUE with colleagues/peers. Plan for some time to interact and fill out in

collaboration over a day maybe

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INSPIRED BY

The Social Design Methods Menu: Julier J., Kimbell L. (2012) Blueprint. p44.



What is it & why should I do it?

A **Blueprint** gives an overview of an organisation's operations, such as key activities, products, services, and points of interaction with the intended audience, stakeholders and beneficiaries. Blueprints help make explicit how existing resources can be repurposed or recycled, and what new resources will be needed. They also give a sense of the overall impact your activities might have. This is highly useful when trying to plan or improve your work.

Filling in the worksheet helps break down your work into smaller details. It provides structure to this analysis by showing a 'line of interaction'. This line represents the distinction between the activities of the intended audience, beneficiaries and other stakeholders, and the activities that take place within your organisation.

PHOW TO USE IT

You can start creating a Blueprint at any point on the worksheet, by filling out key aspects of the interactions between your organisation and its audience or other beneficiaries. The stages at the top of the page represent the stages the interaction with your audience may go through over time (engagement, hand over, use period, follow up). The blocks at the left represent both the external activities by the people you interact with and the internal activities of your team. The 'line of interaction' marks the distinction between external and internal activities.

At the bottom of the page, note down which activities are done internally by your team while they are interacting with your audience. Briefly describe who does what and why, and also what instruments or systems they use for this. At the top of the page, note down which activities are done externally by the people your organisation interacts with, and describe in a similar way who does what and why, and what instruments they may be using for that. From left to right consider which of these activities, actors and instruments are typical for the various stages. By mapping this out you can generate an overview of your key activities, the resources needed, and how these are related.

Completing the worksheet forces you to think through the different ingredients involved in creating, communicating and providing your service or product. You can use the worksheet to analyse a current or future situation. In either case, the worksheet helps you highlight key resources and processes that are required, and to link these with the people or organisations involved. Try to produce a blueprint from the perspective of different stakeholders you are working with and anticipate what their activities and responses to your work might be.

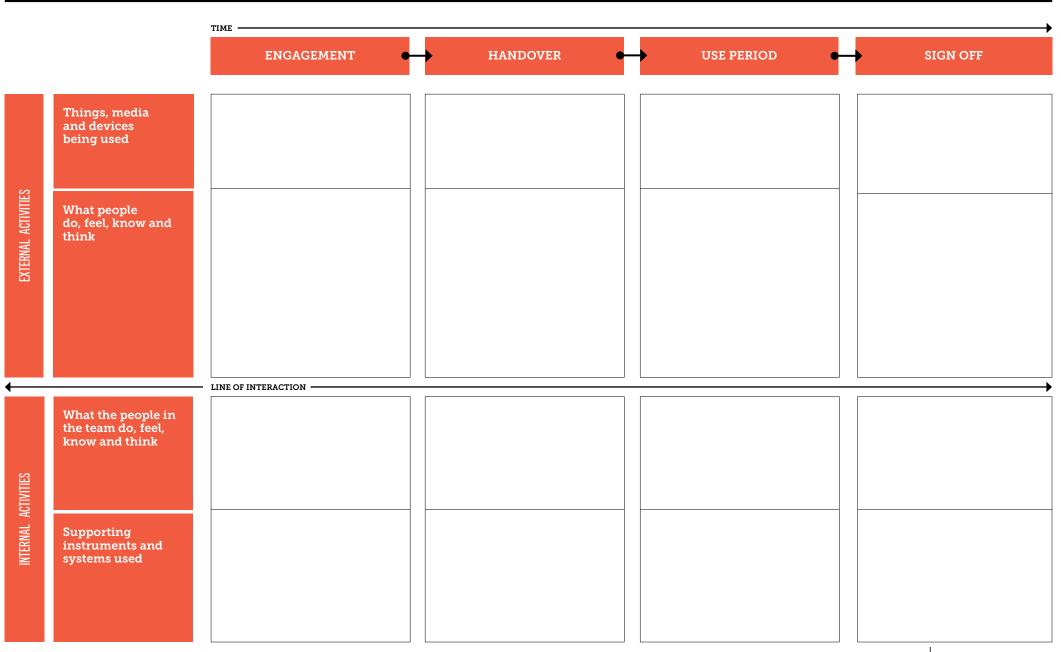
TIME					
		ENGAGEMENT	↔ HANDOVER	↔ USE PERIOD	↔ SIGN OFF
CTIVITIES	Things,media and devices being used				
EXTERNAL ACTIVITIES	What people do, feel, know and think				
INTERNAL ACTIVITIES	What people in the team do, feel, know and think				
INTERNAL	Supporting instruments and systems used				



BLUEPRINT

I want to test and improve

by crafting a detailed overview of our operations and resources





CASE STUDY

TOOL USED: PERSONAS, PROBLEM DEFINITION, IMPROVEMENT TRIGGERS ORGANISATION: SBCSOL - INCUBADORA DE EMPREENDIMENTOS SOLIDARIOS COUNTRY: BRAZIL SECTOR: ENTREPRENEURSHIP AND SKILL DEVELOPMENT ROLE: SOCIAL DESIGNER CONTACT PERSON: RENATA MENDES EMAIL: RENATACM@UOL.COM.BR

Despite coming from a region with such a rich history, these artisan products seem rather basic and functional and are not based on market research.

Sumaré, a city in São Paulo has a very deep history of political and community life. The city is part of a settlement won over thirty years ago by the Movimento dos Sem Terra (Landless Movement), fighting for agrarian reform in Brazil. I'm working with a group of 5 women farmers who make crafts with banana fibre in Sumaré to develop new products, such as lampshades, mats, boxes. Despite coming from a region with such a rich history, these artisan products seem rather basic and functional and are not based on market research. Thus, even though they are technically well developed, the women have difficulty selling their current range of products.



SAMPLES OF THE BANANA FIBRE PRODUCTS MADE BY THE ARTISANS.



WHY WE USED THE TOOL:

We decided to work on the stage before product development i.e. analysing what these women artisans value and what their story is. We planned to use these stories to create a collection of products, giving them a strong foundation that would increase chances of better sales. We also looked at the entire supply chain - from the harvest of raw materials to the storage of products, to make it more efficient.

We adapted and used the Personas, Problem Definition and Improvement Triggers tools for this exercise. Firstly, we needed the artisans to talk about themselves and their community. Here, we used our adaptation of the Personas tool to help conduct research on the history and stories of the artisans and their community. We supplemented these stories with the main problems perceived by the artisans using the Problem Definition tool. I had adapted the Problem Definition tool to project these problems as opportunities.

For more detailed analysis and critique of the artisan's current production techniques, we used an adaptation of the tool Improvement Triggers, which presents a series of commands to help you look at the matter in a different way,

The tool introduces the concept of 'business thinking' to people who have no prior experience as entrepreneurs.

HOW WE USED THE TOOL:

To talk about themselves, the artisans received a closed 'treasure box'. Each woman would open the box and describe what they found inside. Inside, there would be a mirror, which the women used to recognise and expose their thoughts, individual dreams and skills. Later we collated these into groups and made Personas for each group. I used an adaptation of the Personas to create a fictional character that was based on the features that artisans described. Along with this we also collected problems that they felt stood in their way. We then used the Improvement Triggers to come up with new ideas. Often many ideas would get repeated and sometimes we would mix questions - but the number of responses exhausted the number of possibilities and gave a sense of complete analysis. The lack of suitable equipment and materials in this village is very common. I couldn't print PDFs of the tool worksheets, so I redrew them in my workplace using coloured paper, post its and slate.

RESULTS OF USING THE TOOL:

The tool introduces the concept of 'business thinking' to people who have no prior experience as entrepreneurs. It helped the women farmers organise their thoughts and was instrumental in helping them construct concrete goals for themselves and detailing out activities needed for each stage.

Furthermore, the tool provided an accessible language for everyone, irrespective of their education and awareness. Guided by the questions on the canvas, we built a very solid value proposition, which guided the development of other areas of the business model.





I want to sustain & implement by better engaging people that can benefit from my work

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MARKETING MIX LEVEL OF INVOLVEMENT

INSPIRED BY Nesta (2009) Worksheet 4a: Marketing Mix. In: Creative Enterprise Toolkit. O

> **REQUIRES SOME DIALOGUE** with colleagues/peers. Plan for some time to interact and fill out in collaboration over a day maybe.

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What is it & why should I do it?

PHOW TO USE IT

Don't think of the Marketing Mix only as a commercial activity. Look at it as an opportunity to reflect on your work from the experience of a beneficiary.

This tool helps clarify their needs and experiences and helps to think of how to improve your current or future offering.

You can start filling out the different boxes in the worksheet in no particular order. Just go through each section and adapt your answers until you feel they sufficiently answer the questions posed.

'Marketing' what you do doesn't have to mean selling it. The Marketing Mix will help you do this, if that's your goal, but it's also useful for defining the different ways in which people might form opinions about your work - as well as highlighting opportunities for influencing this process. This is a key tool to help you get buy-in from stakeholders for your project.

The **Marketing Mix** worksheet is structured to help you examine your work from the perspective of your beneficiaries. All the elements involved somehow influence the judgements people might make about what you do, helping you understand better those areas which may need attention when trying to achieve real impact. The Marketing Mix can be useful for determining how you trigger the people you're working with, to engage with what you're trying to do.
 Product
 Place
 Price

 Physical Environment
 Process
 People
 Promotion



MARKETING MIX

Product Describe the 'Unique Selling Proposition' that clearly states the features & benefits that make your work unique.		Place Where is your work available to people & how does it get there?	Price What are the returns you recieve for your work?
	_		

Physical environment What impression does your workplace give to your audience, suppliers & staff?

Process

What are the procedures that your company uses to deliver your work?

People Which of your staff or representatives are involved?

Promotion

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What are your means to make your audience aware of your work?





sustain & implement by executing my plan without being overwhelmed

CRITICAL TASKS LIST

INSPIRED BY

Nesta (2009) Worksheet 4b: Critical Marketing Tasks. In: Creative Enterprise Toolkit.

LEVEL OF INVOLVEMENT

(口) 8

REQUIRES SOME DIALOGUE with colleagues/peers. Plan for some time to interact and fill out in collaboration over a day maybe.



What is it & why should I do it?

The **Critical Tasks List** is a way to ensure that what you set out to do is actually possible within the timeframe and budget you have available. This is useful when working alone, but becomes even more important when you need to focus and align your work with others. The list provides a common reference point which everyone can use to keep track of how things are progressing. This enables you to manage your projects by focusing on the tasks at hand.

It's a simple thing to do - and taking the time to do it can really help when you're in danger of being overwhelmed by the amount of work that needs to be done, or worried about how exactly an idea is going to be implemented. When your work starts to grow, and tasks start being shared amongst a large group of people, you may want to shift to a more dynamic and professional project management tool. The Critical Task list is a first step to develop a routine in organising your ongoing work.

PHOW TO USE IT

List all the activities to be carried out, together with who they are assigned to, the budget available, the deadline for completion and the process for final sign off.

Don't fear specificity. Deliberate the activity with the people assigned to it and add in as much detail as possible. You can also break up specific roles people play to perform a specific activity. You should regularly monitor and review the progress of your critical tasks, both in terms of staff resources and budgets. Any deviation from the plan should be acted upon or agreed and amended.





CRITICAL TASKS LIST

ACTIVITY	• •	ASSIGNED TO	• •	BUDGET	• •	DEADLINE	• •	SIGN OFF





BUSINESS PLAN LEVEL OF INVOLVEMENT

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INSPIRED BY Gov.uk (2013) Write a Business Plan.

> **REQUIRES SOME DIALOGUE** with colleagues/peers. Plan for some time to interact and fill out in collaboration over a day maybe.

- 68



What is it & why should I do it?

A **Business Plan** is a structured description of how you do what you do. The plan needs to articulate the problem the business proposes to solve, a vision for how that will be accomplished, and what uniquely qualifies you to do that. Writing a Business Plan is often essential when trying to convince potential funders who want to know where their money will be going. The plan should also include an introduction to the management team, a marketing plan, an operations and financial plan, and any other requirements. This means covering all the different aspects that a funding partner might be interested in, using the kind of language they will be looking out for.

While a tool like the Business Model Canvas provides an overview of what you want to do (as well as why and how you want to do it), a Business Plan is a way of providing more detail on the operational and economic foundation of how you will make this a reality. The structured worksheet of the Business Plan helps you describe what makes your idea for social impact a viable endeavour.

PHOW TO USE IT

This worksheet points out the key aspects that you need to keep in mind as you develop your Business Plan.

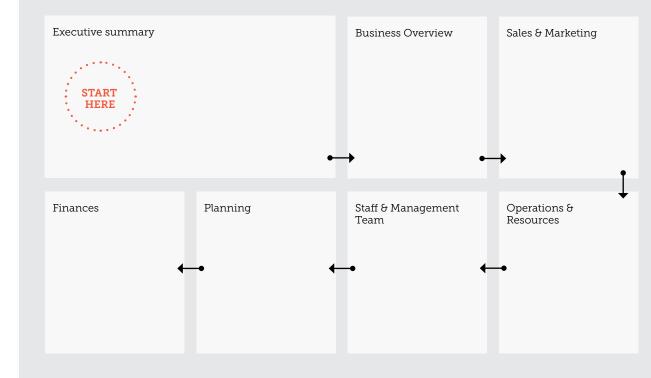
It is easiest to first write a quick draft of your Business Plan and then keep re-writing. Don't spend too long getting the draft and even the next versions 'just right' because it is very likely you will re-write the plan numerous times. During the process you'll come up with much better ways of explaining of what makes your idea for social good feasible.

Writing up the business overview is a good place to start. This includes a few paragraphs about the main idea, the need and market for it. This will be followed up by your plan for action and

what makes your team strong for this task. While approaching funders or donors, a key component of the Business Plan is to have a clear statement of why you need the money, how the money will be spent and how it can be earned back.

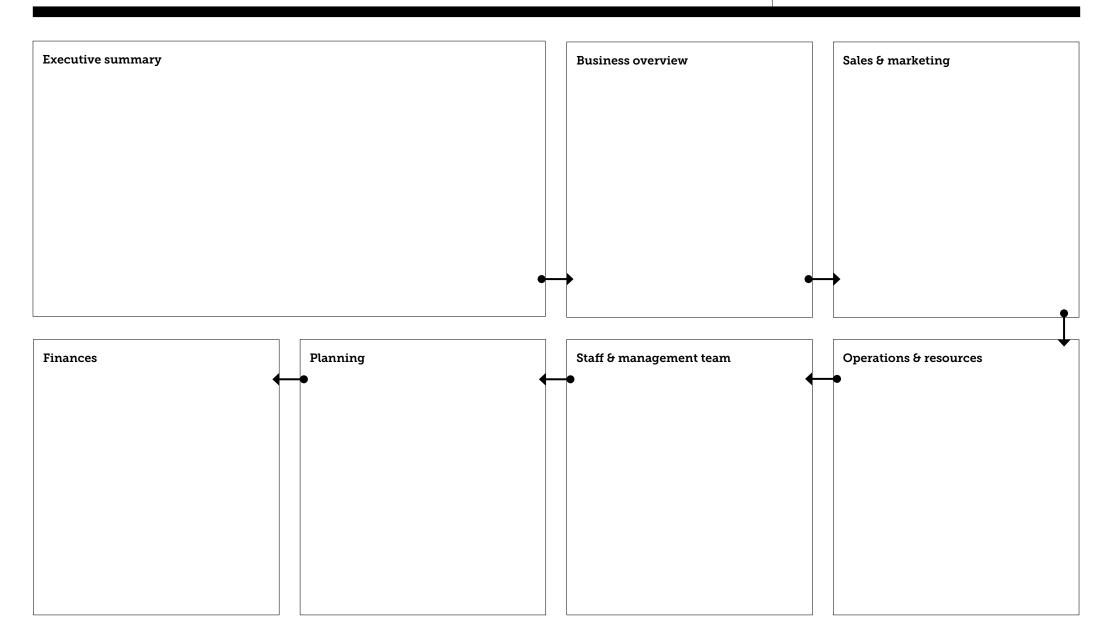
An important element in the Business Plan is the executive summary. This usually sits at the start of the document, but it is seldom written as the first section. It is easier to write it after you have completed a first draft of your Business Plan.

Once you've written your Business Plan, get someone to read it for you. It helps to get a fresh perspective to identify any issues you might have missed out on.





BUSINESS PLAN



PRACTICAL TOOLS TO TRIGGER & SUPPORT SOCIAL INNOVATION Development Impact & You





I want to sustain & implement while exploring different ways of increasing the scale of my work

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SCALING PLAN LEVEL OF INVOLVEMENT



Ali R., Mulgan G., Halkett R., Sanders B. (2007) In and out of sync: The challenge of growing social innovations. London, Nesta.

MORE COMPLEX TOOL that should ideally be done over a few days. Given the strategic nature of the inputs/outputs, this needs consultations with seniors, peers and ideally needs to be revised after a first pass.



What is it & why should I do it?

Once a project or pilot has been successfully implemented, the next step is to build upon this success by sustaining and growing it further. Essentially this means extending the reach of your work to a bigger population. There are many ways of scaling up - from replicating the project across geographies, to collaborating with different organisations towards a shared vision, or even expanding upon the problem your work addresses.

Social organisations can face quite a few challenges in scaling up their work: keeping a clear focus (e.g. strategic spread rather than just sprawling out); negotiating cost structures and revenues (e.g. sustainable income rather than one-of grants or capital); handling effective supply and demand (e.g. demonstrable results, at the right costs, for a receptive audience); leading organisational change (e.g. founders are replaced by managers); choosing the right organisational form (e.g. grow the organisation, partner, merge, take over, license, franchise). There are several resources that need to be in place for a pilot project to be scaled without compromising the necessary impact it must have. Regardless of how and when you decide to scale, it is key to first build a shared vision for scaling within your organisation. The **Scaling Plan** aims to stimulate serious dialogue about this with key internal and external stakeholders.

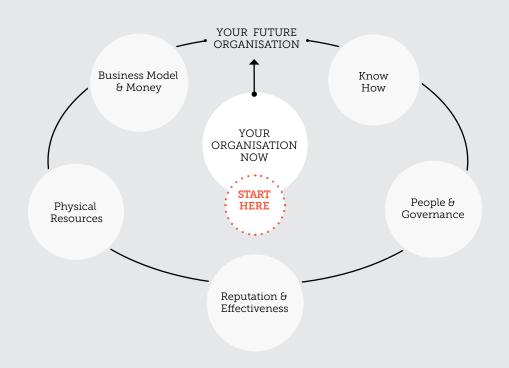
PHOW TO USE IT

The worksheet helps developing a shared vision on scaling up, while assessing your resources and whether your organisation is ready to take the next step. Based on the assessment of the situation, you can decide your readiness to scale, what aspects need strengthening and what aspects need more work.

The worksheet can be used in a workshop with team members from your organisation, potential donors or even the intended beneficiaries and other stakeholders. It shows five key areas which you should consider to analyse whether your organisation is ready to scale. Use the questions on the worksheet as prompts to have a critical in-depth conversation on what you are certain about and what needs further investigation.

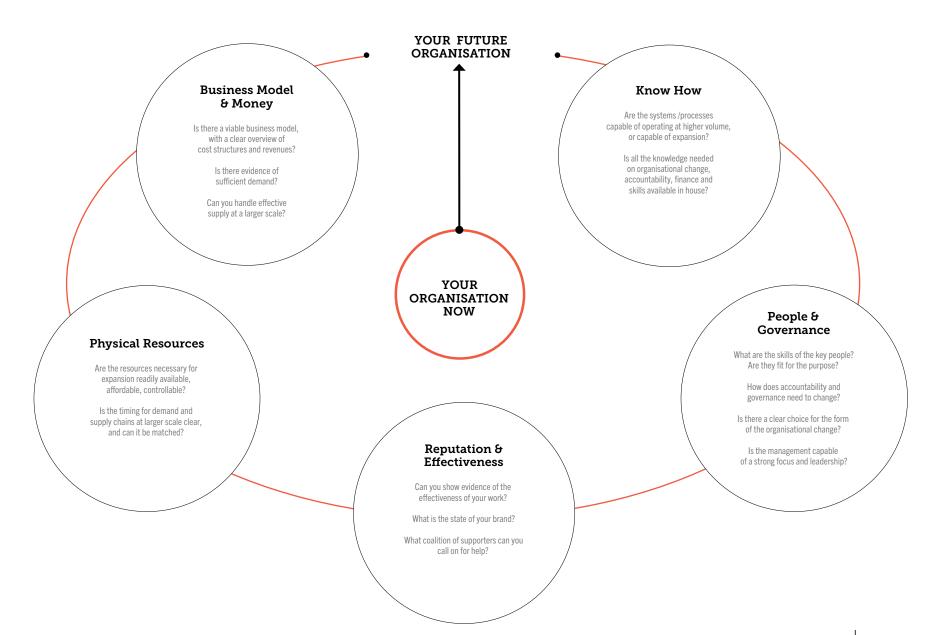
While filling out the worksheet, try to give evidence in the form of factual data, rather than just anecdotes. It often helps to collect some of this evidence in advance of the meeting.

Try to be as open, thorough and self-critical as possible. The more detailed answers you give, the deeper your understanding of the situation will be.





SCALING PLAN





CASE STUDY

TOOL USED: SWOT ANALYSIS , QUESTION LADDER AND CRITICAL TASKS LIST ORGANISATION: MP TECHNICAL ASSISTANCE AND SUPPORTIVE TEAM (MPTAST) COUNTRY: INDIA SECTOR: PUBLIC HEALTH, NUTRITION AND WASH ROLE: DISTRICT PROJECT CO-ODINATOR CONTACT PERSON: RAVI KOMMURI

EMAIL: RKOMMURI@MPTAST.ORG



THE WORKSHEETS JOINTLY CREATED TO ASSESS THE TEAMS CURRENT WEAKNESSES AND WAYS TO OVERCOME THEM.

Madhya Pradesh, a state in central India has very high infant and mother mortality rates, compared to the national average.

Our programme helps strengthen the system and we work closely with the Health Department, WCD (Women & Child Development) & PHED (Public Health Engineering Department) departments aiming to reduce MMR (Maternal Mortality Ratio), IMR (Infant Mortality Ratio), Malnutrition & TFR (Total Fertility Rate) in the state of Madhya Pradesh in India.

MCTS (Mother & Child Tracking System) is an online monitoring software which has been developed by Government of India with an objective to track the different services being provided/ to be provided to a pregnant mother right from conception until the baby turns a year old. This tracking of service delivery plays a vital role and helps in guiding and planning towards the actions to be taken towards MMR & IMR.

The tracking system still needs to be worked upon further before it can be implemented.



WHY WE USED THE TOOL:

My team mates and I used the Theory of Change and Causes Diagram in one combination, and SWOT Analysis, Question Ladder and the Critical Tasks list in another combination. Our aim is to strengthen the usage of the MCTS software by re-defining roles, incentives and contingency strategies for all the people and stakeholders responsible for its functioning. We did this by using a set of tools to re-visit and consolidate the challenge we are facing, and then use another set of tools to identify potential team members and create a critical pathway to implement our solution.

HOW WE USED THE TOOL:

We used these tools in Jabalpur District in Madhya Pradesh as a pilot. First, I explained the purpose of doing the whole exercise to the field team - the District Health Officer, the Auxiliary Nurse Midwife (ANM) and the Accredited Social Health Assistant (ASHA) worker.

- We took stock of :
- 1. Why the MCTS system is not being updated at all;
- 2. The people involved and what their roles are, and;
- 3. Understanding the bottlenecks that we should address to solve the issue.

We then used a combination of SWOT Analysis, Question Ladder and Critical Tasks list.

SWOT ANALYSIS

To understand the team's strengths & weaknesses, to help us figure out what they can do to be more efficient and help people take responsibility for their actions.

QUESTION LADDER

To help redefine individual responsibilities with the entire team's consensus and input.

CRITICAL TASKS LIST To help develop timelines to put the new plan into place.

RESULTS OF USING THE TOOL:

The SWOT Analysis helped the team review their strengths and helped us understand how individual contributions affect the team's work and vice versa. It also helped us envisage possible 'threats' that could hamper the smooth functioning of the system - something that we had never considered before.

The Question Ladder helped us identify potential team members that could be re-assigned with new tasks, timelines and accomplishments in the updated system. The process was participatory and had the consensus of all those involved directly and indirectly. For us, developing or improving programmes and measuring outcomes go hand in hand.

We used the Critical Tasks List to create a new schedule for the updating the service system and create markers to receive feedback on how effective the new system is. In every pilot it is critical to measure the 'perceived and actual' change before we can even think of scaling up. The task list helped us chart that critical journey and milestones for the pilot. Bird's Eye View on Social Innovation The Development Impact and You toolkit has been specially designed for practitioners to dive straight into action. The tools presented here are grounded in existing theories and practices of innovation, design, and business development. This chapter offers a 'bird's eye view' of the main pillars underlying the theory and management of social innovation and each topic is supplemented with references for further reading.

01 Stages of Innovation

Innovation is sometimes written about as an almost magical process. But it is wrong to see innovation as a mystery. It is true that innovation is rarely simple or predictable, but looking closely at what actually happens, it is also true that the overall innovation process is structured and systematic. Although every real innovation is a complex story of loops and jumps, there are various stages that most innovations pass through. This framework is useful for understanding how to put ideas to work, and focusing on the different methods, and different mindset, needed at each stage.

THE SEVEN STAGES ARE:

Opportunities & challenges

These include all the initiating factors like a crisis, new evidence, inspirations etc. which highlight the need for change. This might involve diagnosing the root causes of a problem, or identifying the opportunities that a new change could bring about.

Generating ideas

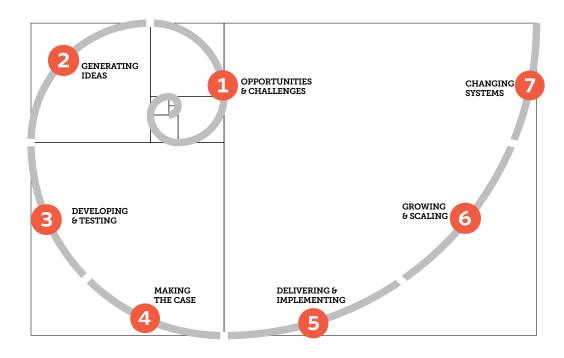
Most of the ideas you come up with at first won't work. But it's only through the process of constant idea creation that you arrive at something that is radical and transformative. Use creative methods like design to increase the number of solution options from a wide range of sources.

Developing & testing

New ideas are always helped by robust criticism. It is through trial and error that ideas are iterated and strengthened. This can be done by simply trying things out, or through more rigorous prototyping and randomised controlled trials.

Making the case

Before you try to implement your idea, you need to prove that it can work and is better than what is already there. Build up firm evidence to back it up and then share it honestly.



Delivering & implementing

This is when the solution becomes everyday practice. It includes identifying what is working well, and what is not, as well as securing income streams that enable the long term financial sustainability to carry the innovation forward.

Growing & scaling

In this stage there are a range of strategies for growing and spreading an innovation - from organisational growth, to licensing and franchising. Emulation and inspiration also play a critical role in spreading an idea or practice in a more organic and adaptive manner.

Changing systems

Systemic innovation is where maximum social impact can be created. It usually involves changes in the public and private sector over long periods of time, and the interaction of many elements and new ways of thinking.

Further reading on the stages of innovation:

- Caulier-Grice J., Mulgan G., Murray R., (2010) Open Book of Social Innovation. London, The Young Foundation, Nesta & The Lab. Available online from: http:// www.nesta.org.uk/library/documents/Social_Innovator 020310.pdf
- Nesta (2013) Available online from: http://www.nesta. org.uk/develop-your-skills

02 Use of evidence

Have a plan for building evidence from the outset of your project. All innovators, commissioners, service users and investors need evidence to know whether the products or services they develop, buy or invest in make a positive difference. In fields such as medicine, using evidence is much more common and offers interesting opportunities to learn from. The main benefit of regular and systematic reviewing of evidence is that it enables a more effective way to use data or information to test assumptions, continually improve, and create a more sustained impact.

Using evidence as a natural part of projects and decision making should be common practice for organisations. And not just evidence on your current projects: understanding what has worked before, and awareness of what works in the wider landscape makes it easier to evaluate and replicate success. The following page has is a useful framework that Nesta has developed to show the different standards of evidence that you should aim to build up throughout a project to show that it is making a difference.

THE FIVE LEVELS ARE:

OAccount of impact

A clear explanation of what the new or improved product or service does and how it could have impact on your intended outcome, and why that would be an improvement on the current situation.

2Correlation

Observation of some positive impact happening on the part of the users of the product or service, but no confirmation yet on what caused this. You might conduct pre and post survey evaluations, or a cohort/panel study for instance.

Causation

Establishment of evidence of positive change amongst the users of the product or service due to the product or service. Think about how to isolate the impact of the product or service through a control group selected randomly to strengthen your evidence base.

4Independent replication

Independent validation of the positive outcomes of the product or service, with the aim to deliver this positive impact at a reasonable cost in other places, such as commercial standards or industry kitemarks.

	LEVELS OF EVIDENCE	1 you can describe what you do and why it matters logically, coherently and convincingly	2 you capture data that shows positive change, but you cannot confirm that your intervention caused the change	3 you can demonstrate causality with reference to a control group or comparison group	you have one or more independent evaluations that confirms your conclusions and potentially replicates your results	5 you have manuals, systems and procedures to support and ensure faithful replication or your innovation
e e e e	IOW TO GENERATE THE EVIDENCE	you should be able to do this yourself by drawing on existing data and research from other sources. Constructing a theory of change should help you to logically and coherently describe how your intervention will achieve the effects you outline.	at this stage, data can begin to show the effect your innovation has but may not demonstrate direct casuality. Many of the methods outlined in the previous topic will help as would more structured surveys of your participants before and after, or at intervals during your invention.	in order to demonstrate casuality, you will need to show evidence of what happened to those involved in your intervention alongside evidence of what happened to a similar group who were not involved in your intervention (called a control group). Selecting participants randomly to both groups strengthens your evidence and you will need to have a sufficiently large	you should commission a robust independent evaluation that demonstrates and validates why and how your innovation creates impact. You might also seek endorsement via commercial standards, industry kitemarks or similar.	you need to show that you product or service can be operated by someone else somewhere else, whilst continuing to have positiv direct impact on the outco and remaining a financially viable proposition. Toward this end, you might pursue evaluation across multiple contexts that, amongst ot things, tests the fidelity of practice and outcomes between sites.

Scaled

H

Use methods like multiple replication evaluations or future scenario analysis to generate clear and tested evidence that the product or service can been delivered at multiple locations and delivers a strong, positive impact, whilst remaining a financially viable proposition.

Further reading on evidence:

sample for your results to be

convincing.

 Puttick R. (2011) Ten Steps to Transform the Use of Evidence. London, Nesta. Available online from: http://www.nesta. org.uk/library/documents/TenStepsBlog.pdf

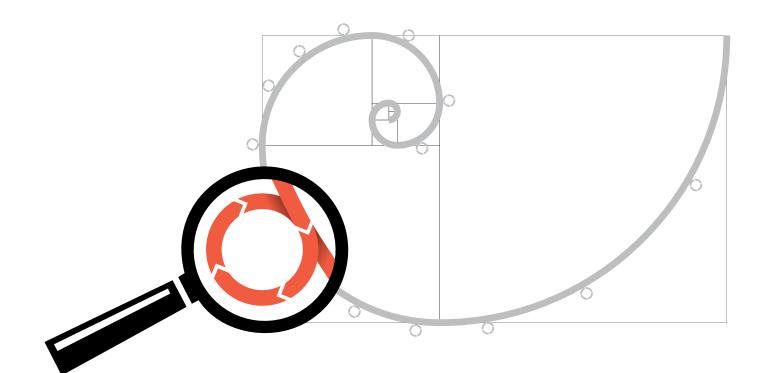
ie an

- Ludlow J., Puttick R. (2012) Standards of Evidence. London, Nesta. Available online from:http://www.nesta.org.uk/ publications/nesta-standards-evidence
- Mulgan G., Puttick R. (2013) Making Evidence Useful: The Case for New Institutions. London, Nesta. Available online from: http://www.nesta.org.uk/library/documents/MakingEvidenceUseful.pdf
- DfID: Department for International Development (2013) How to note. London, Dfid. Available online from: http://bit.ly/ dfid-evidence
- BOND for International Development (2013) Evidence Principles. London, BOND. Available online from: http://www. bond.org.uk/effectiveness/principles#download

03 Scaling Up

The concept of scaling up is attracting increasing attention as it extends the reach of innovative pilot projects to large populations. There are many ways of scaling up – from repeating an idea in a different place, or collaborating with different organisations and building relationships that work.

To determine if a project is ready to scale and achieve greater impact in a more widespread manner, it is important to find the things that work, get them to work smoothly and move them up to the next level. It is useful to think through effective demand and effective supply; i.e. is there someone out there who is willing to pay for your idea? And does your idea work, and does it work better than the alternatives? Nearly always the task of scaling a social idea involves increasing both effective supply and



effective demand, but your strategy will vary greatly depending on which comes first.

From a distance great innovations may look like radical leaps. But from close up they often turn out to be made of small steps that build on each other to achieve bigger scale. Under a microscope the different stages of innovation might be magnified to show 'mini-spiral' processes taking place - individual projects that an organisation might be developing to support the overall innovation process.

Further reading on scaling up:

- Ali R., Mulgan G., Halkett R., Sanders B. (2007) In and out of sync: The challenge of growing social innovations. London, Nesta. Available online from:http://www. nesta.org.uk/publications/and-out-sync
- Cooley L., Kohl R. (2006) Scaling Up From Vision to Large-scale Change: A Management Framework for Practitioners. Washington, Management Systems Institute, John D. and Catherine T. MacArthur Foundation. Available online from: http://www.msiworldwide.com/ wp-content/uploads/Scaling-Up-Framework.pdf

04 Systems thinking

The word 'system' refers to complex and interdependent infrastructures, rules and patterns in our societies and economies. Changes in one part may affect other parts, so complex issues require changes and innovations across the system. Systems thinking brings together the different elements and innovations that achieve a common purpose. A single organisation almost never has all the skills and resources to provide the full range of activities that are needed to create a big impact. This means that an innovation resulting in systemic change almost always involves an alliance of partners, suppliers and distributors, supported by networks, clubs, think tanks and development agencies.

Further reading on systems thinking:

- Leadbeater C., Mulgan G. (2013) Systems Innovation Discussion Paper. London, Nesta. Available online from: http:// www.nesta.org.uk/library/documents/Systemsinnovationv8.pdf
- Seddon J. (2013) Systems failure and Systems thinking. London, Nesta. Available online from: http://www.nesta.org.uk/ blogs/systemic_innovation_a_discussion_series/systems_failure_and_systems_thinking

Key Sources of Inspiration

O1 INNOVATION FLOWCHART

Nesta (2013) Innovation Flowchart. Available online from: http://www.nesta.org.uk/publications/ innovation-flowchart

O2EVIDENCE PLANNING

Nesta (2009) Worksheet 2b: Evidence Modelling. In: Creative Enterprise Toolkit. Available online from: http://www.nesta.org.uk/publications/creativeenterprise-toolkit

O SWOT ANALYSIS

MindTools (1996) SWOT Analysis. Available online from: http://www.mindtools.com/pages/article/ newTMC_05.htm

O4 BUSINESS MODEL CANVAS

Osterwalder A., Pigneur Y (2010) Business Model Generation. Available online from: http://www. businessmodelgeneration.com/downloads/business_ model_canvas_poster.pdf

OGBUILDING PARTNERSHIPS MAP

Tennyson R. (2003) 12 Phases in the Partnering Process, p4. In: The Partnering Toolbook. Available online from: http://www.toolkitsportdevelopment.org/ html/resources/E1/E1585B25-8A8A-44A9-BC6C-F519987AD2CE/pt-en.pdf

OGLEARNING LOOP

IDEO (2011) Deliver: Create a learning plan, p145. In: IDEO, Human Centered Design Toolkit. Edition - 2. London: IDEO. Available online from: http://www.ideo. com/work/human-centered-design-toolkit/

O P EXPERIENCE TOUR

Design Council (2011) Service Safari. In: Keeping Connected Design Challenge. Available online from: https://www.hvcollege.com/documents/technology/ ServiceSafariActivity.pdf

O[®]PROBLEM DEFINITION

Julier J., Kimbell L. (2012) Problem Definition. p30. In: The Social Design Methods Menu. Available online from: http://www.lucykimbell.com/stuff/Fieldstudio_ SocialDesignMethodsMenu.pdf

OOCAUSES DIAGRAM

Namahn and Yellow Window Service Design, Design Flanders (2012) Cause Diagram. In: Service design toolkit. Available online from: http://www. servicedesigntoolkit.org/assets/posters/workposter_ causediagram_a1.pdf

10THEORY OF CHANGE

Nesta (2011) Theory of Change. Available online from: http://www.nesta.org.uk/library/documents/ TheoryOfChangeDiagram_Editable.pdf

OOSHADOWING

Lovlie L.,Reason B.,Polaine A. (2013) Service Design: From Insight to Implementation. p54-p57. Rosenfeld Media

12INTERVIEW GUIDE

IDEO, Bill & Melinda Gates Foundation (2012) Develop an interview approach p58. In: Human Centred Design Toolkit. Available online from: http:// www.hcdconnect.org/methods/interview-techniques

DBQUESTION LADDER

Teachers College Columbia University (2012) Question. In: Social Innovation Toolkit. Available online from: http://www.socialinnovationtoolkit.com/ question.html

14STORYWORLD

Julier J., Kimbell L. (2012) Storyworld. p24. In: The Social Design Methods Menu. Available online from: http://www.lucykimbell.com/stuff/Fieldstudio_ SocialDesignMethodsMenu.pdf

O PEOPLE & CONNECTIONS MAP

Namahn and Yellow Window Service Design, Design Flanders (2012) Stakeholder Mapping. In: Service design toolkit. Available online from: http://www. servicedesigntoolkit.org/assets/posters/workposter_ stakeholdermapping_a1.pdf

OGTARGET GROUP

Nesta (2009) Worksheet 3a: Your Customers. In: Creative Enterprise Toolkit. Available online from: http://www.nesta.org.uk/publications/creativeenterprise-toolkit

OPERSONAS

Business Design Toolkit (2010) Personas. Available online from: http://www.businessdesigntools. com/2011/12/personas/

1³PROMISES & POTENTIAL MAP

IDEO (2011) Deliver: Plan a pipeline of solutions, p135. In: IDEO, Human Centered Design Toolkit. Edition - 2. London: IDEO. Available online from: http://www.ideo.com/work/human-centered-designtoolkit/

OOCREATIVE WORKSHOP

Lovlie L.,Reason B.,Polaine A. (2013) Service Design: From Insight to Implementation. p60. Rosenfeld Media

20FAST IDEA GENERATOR

Nesta (2013) Fast Idea Generator. Available online from: http://www.nesta.org.uk/publications/fast-ideagenerator

21THINKING HATS

de Bono, E. (1985) Six Thinking Hats. USA: Little, Brown and Company. Available online from: http:// www.debonogroup.com/six_thinking_hats.php

22VALUE MAPPING

Nesta (2009) Worksheet 2a: Your Values. In: Creative Enterprise Toolkit. Available online from: http://www. nesta.org.uk/publications/creative-enterprise-toolkit

2BIMPROVEMENT TRIGGERS

Eberle, B (1997) Scamper Worksheet. USA: Prufrock Press. Available online from: http://bmgi.org/toolstemplates/scamper-worksheet

24PROTOTYPE TESTING PLAN

Nesta (2011) Prototyping in Public Spaces. Available online from: http://www.nesta.org.uk/publications/ prototyping-public-services

2GEXPERIENCE MAP

Schneider J., Stickdorn M., (2010)The Customer Journey Canvas. In: This is Service Design Thinking. Amsterdam: BIS Publishers. Available online from: http://files.thisisservicedesignthinking.com/tisdt_ cujoca.pdf

26BLUEPRINT

Julier J., Kimbell L. (2012) Blueprint. p44. In: The Social Design Methods Menu. Available online from: http://www.lucykimbell.com/stuff/Fieldstudio_ SocialDesignMethodsMenu.pdf

20MARKETING MIX

Nesta (2009) Worksheet 4a: Marketing Mix. In: Creative Enterprise Toolkit. Available online from: http://www.nesta.org.uk/publications/creativeenterprise-toolkit

26CRITICAL TASKS LIST

Nesta (2009) Worksheet 4b: Critical Marketing Tasks. In: Creative Enterprise Toolkit. Available online from: http://www.nesta.org.uk/publications/creativeenterprise-toolkit

29BUSINESS PLAN

Gov.uk (2013) Write a Business Plan. Available online from: https://www.gov.uk/write-business-plan

30SCALING PLAN

http://www.nesta.org.uk/publications/and-out-sync

Recommended Resources

PUBLICATIONS

- 1. Aid on the Edge of Chaos Ben Ramalingam
- 2. Dead Aid Dambisa Moyo
- Poor Economics: A Radical Rethinking of the Way to Fight Global Poverty Esther Duflo & Abhijit Banerjee
- Creating a World without poverty: Social Business and the Future of Capitalism Muhamad Yunus
- 5. More Than Good Intentions: Improving the Ways the World's Poor Borrow, Save, Farm, Learn, and Stay Healthy

Dean Karlan & Jacob Appel

- 6. The Power of Positive Deviance Richard Pascale, Jerry Sternin & Monique Sternin
- Scaling Up From Vision to Large-scale change: A Management Framework for Practitioners Larry Cooley and Richard Kohl

- UNDP: Financing for Development http://www.undp.org/content/dam/undp/library/ Poverty%20Reduction/Development%20 Cooperation%20and%20Finance/ InnovativeFinancing_Web%20ver.pdf
- 9. World Bank: Innovation Policy A Guide for Developing Countries https://openknowledge.worldbank.org/bitstream/
 - handle/10986/2460/548930PUB0EPI11C10Disl osed061312010.pdf?sequence=1
- OECD: Innovation for Development http://www.oecd.org/sti/inno/50586251.pdf

- 11. Open Book of Social Innovation Robin Murray, Julie Caulier-Grice, Geoff Mulgan http://www.nesta.org.uk/publications/open-booksocial-innovation
- 12. In and out of sync Nesta (Geoff Mulgan with Rushanara Ali, Richard Halkett and Ben Sanders) http://www.nesta.org.uk/publications/and-outsync
- 13. Our Frugal Future: Lessons from India's Innovation system

Nesta (Kirsten Bound & Ian Thornton) http:// www.nesta.org.uk/publications/our-frugal-futurelessons-india%C2%92s-innovation-system

14. China's Absorptive State: Innovation and research in China

Nesta (Kirsten Bound, Tom Saunders, James Wilsdon and Jonathan Adams) http://www.nesta. org.uk/publications/chinas-absorptive-stateinnovation-and-research-china

15. The Digital Social Innovation Report

Nesta (Nesta (Francesca Bria) http://s3-eu-west-1.amazonaws.com/ digitalsocialinnovation/attachments/52eb bc3a72b09eaa31000001/DSI-report_(2). pdf?1391180858

WEBSITES

1. World Bank Institute

http://wbi.worldbank.org/wbi/ (also see World Bank Challenge Platform https://wbchallenge.imaginatik.com/, World Bank Development Marketplace http:// wbi.worldbank.org/wbdm/, Innovative Solutions http://wbi.worldbank.org/ wbi/approach/innovation)

2. OECD Wikiprogress

http://www.wikiprogress.org/index.php/ Wikiprogress.org:About

- 3. Oxfam Policy & Practice http://policy-practice.oxfam.org.uk/
- 4. ODI Publications http://www.odi.org.uk/publications
- 5. Abdul Latif Jameel Poverty Action Lab http://www.povertyactionlab.org/about-j-pal

TOOLKITS

- IDEO HCD toolkit http://www.ideo.com/work/human-centereddesign-toolkit/
- Project Innovation http://www.socialinnovationtoolkit.com/home. html
- 3. UNICEF Innovation Labs A Do-It-Yourself Guide http://www.unicefinnovationlabs.org/
- 4. Finding What Works http://findingwhatworks.org/
- 5. +Acumen http://plusacumen.org/
- 6. Business Model Canvas http://www.businessmodelgeneration.com/ canvas

NETWORKS

- 1. Social Innovation Exchange (SIX) http://www.socialinnovationexchange.org/
- 2. Alliance for Useful Evidence http://www.alliance4usefulevidence.org/
- 3. Smart Citizen http://forum.smartcitizen.me/
- 4. Arduino http://arduino.cc/
- D-Lab: International Development Innovation Network http://d-lab.mit.edu/idin)
- 6. Random Hacks of Kindness http://www.rhok.org/

BLOGS

- 1. Poverty Matters http://www.theguardian.com/globaldevelopment/poverty-matters
- 2. Chris Blattman http://chrisblattman.com/
- 3. From Poverty to Power http://oxfamblogs.org/fp2p/
- 4. DFID Bloggers http://blogs.dfid.gov.uk/
- 5. ODI Opinion http://www.odi.org.uk/opinion



ISBN 978-1-84875-150-7 £19.99



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REPORT 2023

BOLOGN







PREMESSA







Legacoop Bologna ha avviato dal 2018 il progetto **Agenda Cooperativa per Io Sviluppo Sostenibile – Bologna 2030**, un percorso volto ad sostenere il **sistema cooperativo verso gli obiettivi dell'Agenda ONU 2030**, mettendo a disposizione delle imprese associate elementi di visione e strumenti utili a misurare le **performance ESG**, evidenziando il contributo alla crescita sostenibile del territorio della Città Metropolitana di Bologna.

SCS Consulting ha accompagnato attivamente nel tempo Legacoop Bologna e le sue imprese associate nel declinare **obiettivi e target** dell'**Agenda ONU 2030** in **indicatori customizzati**, in grado di esprimere la **capacità contributiva** delle imprese cooperative allo sviluppo sostenibile del territorio metropolitano bolognese, integrandolo con l'**Agenda Metropolitana per lo sviluppo sostenibile**.

CRIBIS ha supportato il progetto, realizzando il **monitoraggio delle performance ESG** delle cooperative associate attraverso **SynESGy** la **piattaforma digitale e globale** per raccogliere e gestire informazioni sulla sostenibilità delle aziende, basata su **GRI standard** e relativi **sotto-obiettivi** dell'**Agenda ONU 2030**. In particolare, per il 2023, il questionario ESG è stato somministrato ad un campione di **30 imprese rappresentative del movimento bolognese**, indagandone i principali elementi di business, nonché le performance ambientali e sociali.

PREMESSA

I dati presentati sono l'esito di un'indagine che **ha coinvolto un campione di 30 imprese cooperative aderenti a Legacoop Bologna**, selezionate perché rappresentative di:







- Vetimec
- Iris Coop Sociale
- Coop Sociale Società Dolce
- CIAB Società Cooperativa
- Consorzio Integra
- CNS Consorzio Nazionale Servizi
- Open Group Società Cooperativa
- Il Martin Pescatore Coop Sociale

- La Città Verde Coop Sociale
- Coop Edificatrice Ansaloni
- Coop Alleanza 3.0
- Piazza Grande
- COSEPURI
- Nuova IAB
- Coop Reno
- C.A.D.I.A.I.

- СО.ТА.ВО. •
- Good Truck
 - Granarolo S.p.A.
- Consorzio Agribologna
- Conor S.r.l.
- Alce Nero S.p.A.
- CONAPI

•

Pictor Società Cooperativa

Laddove il riferimento del dato non sia al campione ma al totale delle imprese aderenti, è presente un riferimento secondo la seguente legenda:



Imprese del campione Legacoop Bologna



Totale imprese aderenti a Legacoop Bologna

- CAMST
- COIND
- II Raccolto
- Cooperativa Autotrasporti Nuova Camp Veloci
- **Coop Risanamento**
- **Coop Edificatrice Giuseppe Dozza**



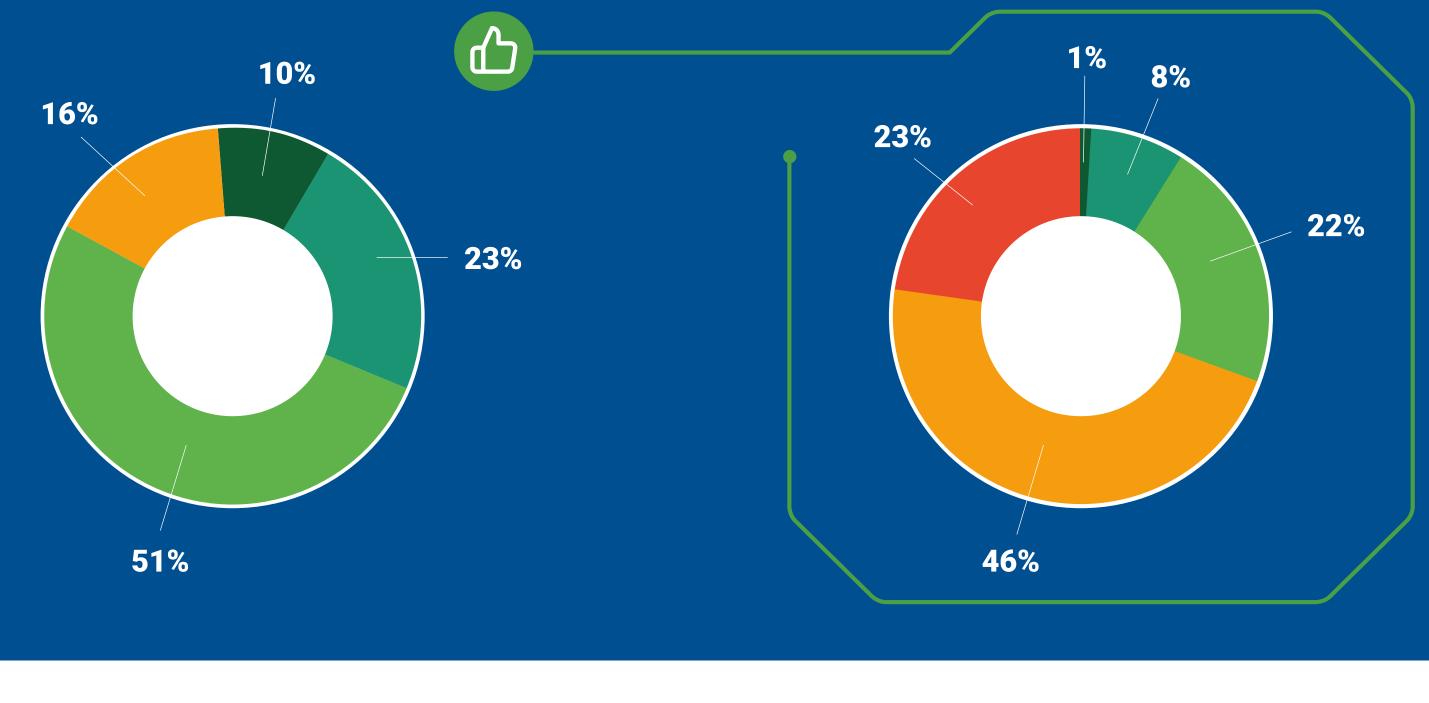




Legacoop Bologna

LEGENDA:

Ottimo



Buono

Soddisfacente

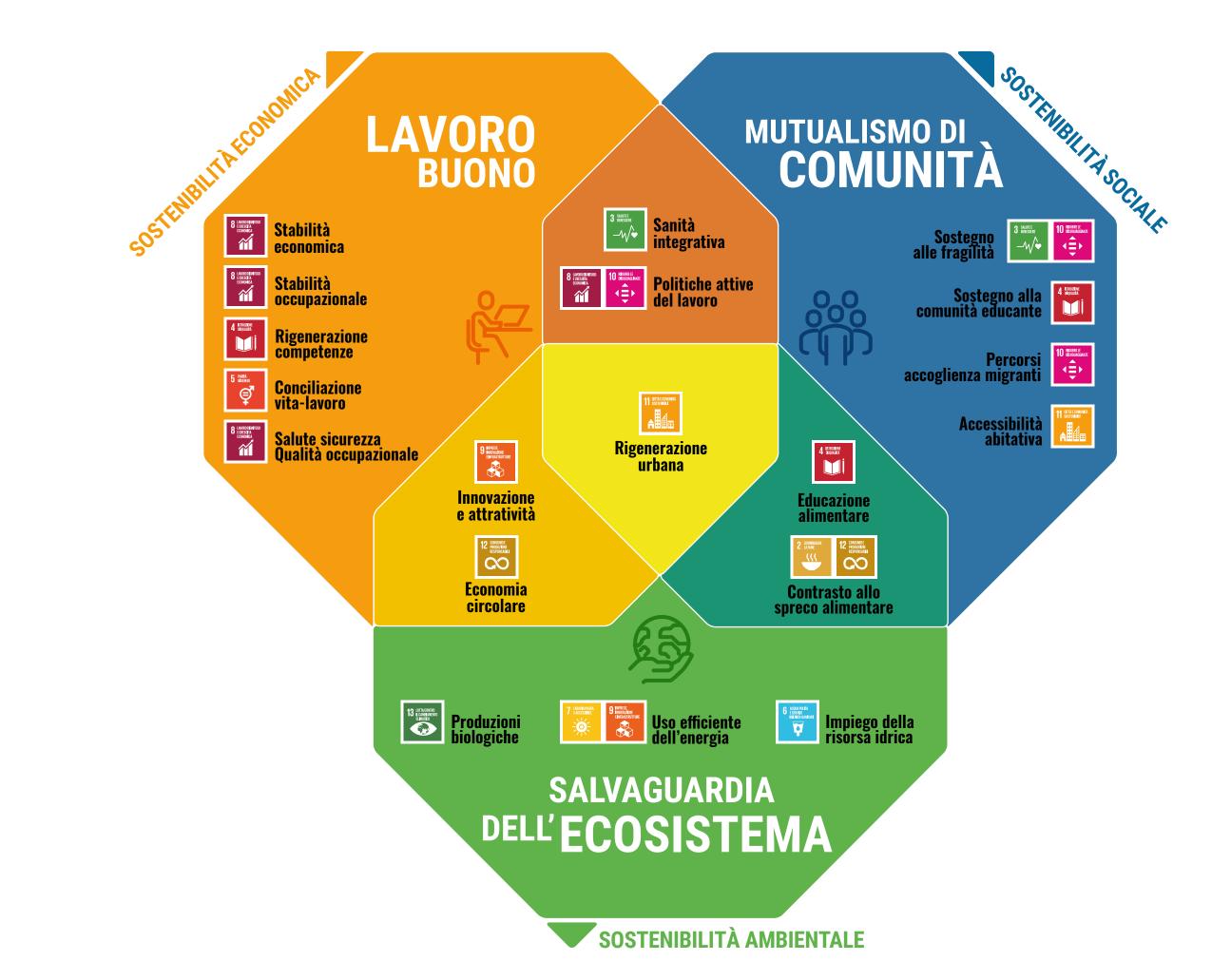
Imprese italiane

BENCHMARK

Sufficiente



Basso







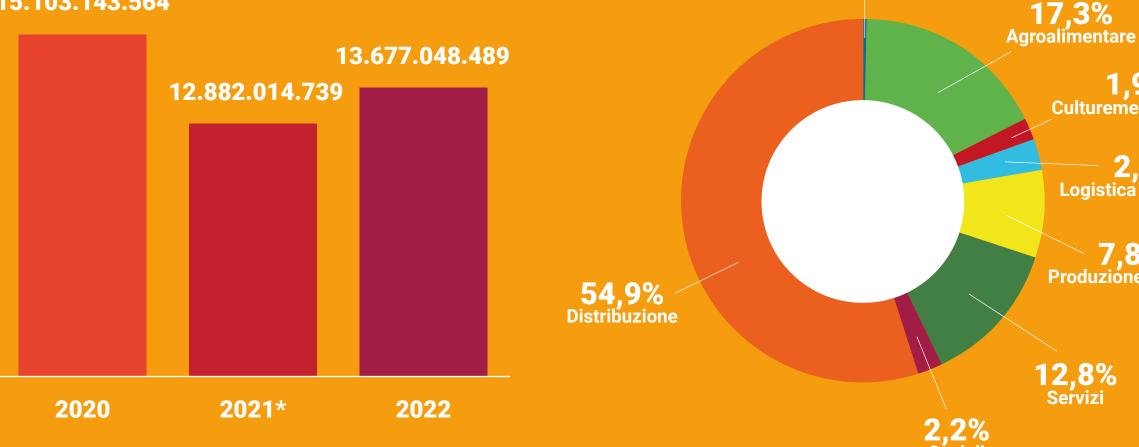
8.2 Raggiungere standard più alti di produttività economica attraverso la diversificazione, il progresso tecnologico e l'innovazione, anche con particolare attenzione all'alto valore aggiunto e ai settori ad elevata intensità di lavoro

Valore della produzione

Valore della produzione per settore (2022)

0,3% Abitazione





Utili a fondo mutualistico: **1.259.878 euro** Utili a riserva indivisibile: 26.638.182 euro





1.9% Culturemedia + Altro

2,8% Logistica e trasporti

7,8% Produzióne e lavoro

AZIONI AGENDA 2.0 CITTÀ METRO BOLOGNA

Promozione della buona occupazione. Allargamento base occupazionale, piena occupazione e diffusione del buon lavoro

* Il calo registrato nel raffronto dei dati 2020/2021 è da imputarsi unicamente ad un'operazione straordinaria di fusione di una struttura di servizio in un'impresa della G.D.O. che ha impattato negativamente sugli andamenti di settore.





8.2 Raggiungere standard più alti di produttività economica attraverso la diversificazione, il progresso tecnologico e l'innovazione, anche con particolare attenzione all'alto valore aggiunto e ai settori ad elevata intensità di lavoro

Patrimonio netto (in €) Capitale sociale (in €) 3.640.378.443 568.525.772 3.640.029.096 556.952.388 3.592.273.638 553.639.258 2020 2021 2022 2020 2021 2022



AZIONI AGENDA 2.0 CITTÀ METRO BOLOGNA

Promozione della buona occupazione. Allargamento base occupazionale, piena occupazione e diffusione del buon lavoro



8.5 Garantire un'occupazione piena e produttiva e un lavoro dignitoso per donne e uomini, compresi i giovani e le persone con disabilità, e un'equa remunerazione per lavori di equo valore

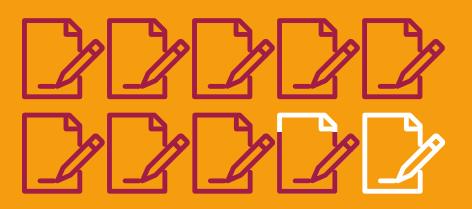
46.041

lavoratori



89%

di contratti a tempo indeterminato nelle imprese





AZIONI AGENDA 2.0 CITTÀ METRO BOLOGNA

Promozione della buona occupazione. Allargamento base occupazionale, piena occupazione e diffusione del buon lavoro





4.4 Aumentare sostanzialmente il numero di giovani e adulti che abbiano le competenze necessarie, incluse le competenze tecniche e professionali, per l'occupazione per lavori dignitosi e per la capacità imprenditoriale



delle imprese ha attivato corsi di formazione, per un totale di 331.641 ore di formazione erogate

Gli ambiti della formazione erogata: 90% Salute e sicurezza

- 45% Privacy (es. GDPR)
- **31% Tematiche ambientali**
- **21%** Lotta alla corruzione





Rafforzare e incrementare le opportunità di formazione permanente

BENCHMARK

68.

delle imprese attive in Italia con almeno 10 addetti ha svolto attività di formazione professionale, oltre 90% tra le grandi imprese

[Fonte ISTAT ultimo dato disponibile - pubblicazione dicembre 2022]





5.5 Garantire alle donne la piena ed effettiva partecipazione e pari opportunità di leadership a tutti i livelli del processo decisionale nella vita politica, economica e pubblica

75% occupazione femminile (sul totale)

36%

donne in posizioni qualificate (Dirigenti/Quadri)

28%

rappresentanza femminile nei Consigli di Amministrazione

36%

donne nelle maggiori cariche (presidente/ vicepresidente)

77% delle imprese del campione applicato strumenti di work-life balance

56% flessibilità oraria, smart working 20% agevolazioni per famiglie, asilo, summer camp, borse studio **30% contratti part time**





Conciliazione vita-lavoro. Sviluppo di una strategia di responsabilità sociale di territorio

BENCHMARK

68%

delle imprese italiane con almeno 3 addetti ha attivato strumenti di flessibilità oraria e il 15% consente lo smart working

[Fonte ISTAT ultimo dato disponibile pubblicazione dicembre 2020]





8.8 Proteggere i diritti del lavoro e promuovere la sicurezza nei luoghi di lavoro per tutti i lavoratori





delle imprese cooperative certificate ISO 45001 o OHSAS 18001





Promozione della buona occupazione. Allargamento base occupazionale, piena occupazione e diffusione del buon lavoro







3.8 Conseguire una copertura sanitaria universale, l'accesso a servizi essenziali di assistenza sanitaria



Il **93%** delle imprese del campione ha attivato strumenti di welfare

delle imprese applica CCNL o ha accordi aziendali che prevedono forme di integrazione delle prestazioni sanitarie





Sistema welfare di comunità e prossimità e esperienze di welfare aziendale e territoriale integrativo



delle imprese italiane con almeno 3 addetti ha attivato strumenti di welfare

BENCHMARK

[Fonte ISTAT ultimo dato disponibile – pubblicazione dicembre 2020]





Politiche attive del lavoro

8.5 Garantire un'occupazione piena e produttiva e un lavoro dignitoso per donne e uomini, compresi i giovani e le persone con disabilità, e un'equa remunerazione per lavori di equo valore **10.2** Potenziare e promuovere l'inclusione sociale, economica e politica di tutti





AZIONI AGENDA 2.0 **CITTÀ METRO BOLOGNA**

Sostegno e riattivazione delle persone in condizione di fragilità. Integrazione delle politiche sociali e sanitarie con le politiche del lavoro e le politiche abitative







10.2 Potenziare e promuovere l'inclusione sociale, economica e politica di tutti
3.8 Conseguire una copertura sanitaria universale, l'accesso a servizi essenziali di assistenza sanitaria di qualità

22	658	
pers	sone	

919	salute mentale (DSM)
1.572	dipendenze patologiche
5.002	assistenza domiciliare
3.800	disabilità
1.693	anziani non autosufficienti nei diurni e nelle residenze
8.338	emarginazione adulta
1.334	minori



AZIONI AGENDA 2.0 CITTÀ METRO BOLOGNA

Costruzione di una rete di servizi a sostegno degli anziani e delle persone non autosufficienti. Promozione della prossimità e domiciliarità dei servizi attraverso integrazioni servizi sociali e socio-sanitari territoriali. Programmazione innovativa dei servizi e ricomposizione delle filiere dei servizi

centri







4.1 Assicurarsi che tutti i ragazzi e le ragazze completino una istruzione primaria e secondaria libera, equa e di qualità **4.2** Assicurarsi che tutte le ragazze e i ragazzi abbiano accesso a uno sviluppo infantile precoce di qualità, alle cure necessarie e all'accesso alla scuola dell'infanzia 4.5 Eliminare le disparità di genere nell'istruzione e garantire la parità di accesso a tutti i livelli di istruzione per i più vulnerabili, comprese le persone con disabilità e i bambini in situazioni vulnerabili



4.288 asili nido e infanzia (0-6) 31.230 sostegno socio-educativo 15.356 servizi di integrazione scolastica



AZIONI AGENDA 2.0 CITTÀ METRO BOLOGNA

Contrastare le povertà educative e la dispersione scolastica. Promozione di azioni specifiche per l'inclusione scolastica dei bambini e degli studenti con disabilità. Costruzione di un sistema integrato dell'apprendimento permanente Creazione di un nuovo sistema educativo integrato 0-6 anni









10.7 Facilitare la migrazione ordinata, sicura, regolare e responsabile e la mobilità delle persone, anche attraverso l'attuazione di politiche migratorie programmate e ben gestite



1287 persone accolte





Integrazione sociale dei cittadini stranieri immigrati, promozione dell'accesso ai diritti di cittadinanza







11.1 Garantire a tutti l'accesso ad un alloggio e a servizi di base adeguati, sicuri e convenienti
11.3 Aumentare l'urbanizzazione inclusiva e sostenibile e la capacità di pianificazione e gestione partecipata e integrata dell'insediamento umano

Edilizia Residenziale Sociale

10.744

alloggi



alloggi a **proprietà indivisa** canone medio locazione permanente:



7.231 alloggi realizzati a proprietà divisa









Promozione di programmi di edilizia residenziale sociale attraverso interventi per l'abitare condiviso e solidale





[Fonte: media tra Rapporto Nomisma, Immobiliare.it, Ricerca UIL su Bologna]







4.7 Assicurarsi che tutti gli studenti acquisiscano le conoscenze e le competenze necessarie per promuovere lo sviluppo sostenibile attraverso, tra l'altro, l'educazione per lo sviluppo sostenibile e stili di vita sostenibili

di imprese operanti nel food

ha attivato iniziative e progetti di educazione alimentare/consumo consapevole

45.200 di soggetti beneficiari

di iniziative di educazione alimentare e consumo consapevole tra scuole, soci utenti e lavoratori





Promozione dell'educazione alimentare

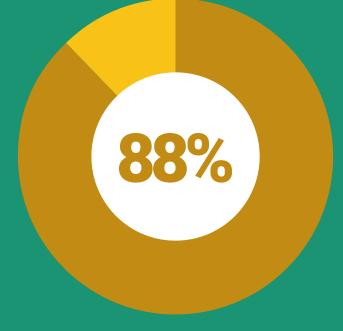






Contrasto allo spreco alimentare

2.2 Eliminare tutte le forme di malnutrizione, e soddisfare le esigenze nutrizionali 12.3 Dimezzare lo spreco alimentare globale pro-capite a livello di vendita al dettaglio e dei consumatori e ridurre le perdite di cibo durante le catene di produzione e di fornitura, comprese le perdite del post-raccolto



88% di imprese operanti nel food ha attivato progetti di contrasto allo spreco alimentare

I progetti erano diretti a:

57% riduzione di perdite nella gestione a punto vendita 57% riduzione di perdite in fase di trasformazione 43% riduzione di perdite nella gestione delle merci in piattaforma 14% riduzione di perdite in campo

5.025 tonnellate di beni alimentari recuperati grazie alla vendita scontata (taglio prezzo su fine vita prodotto)



2.443 tonnellate di merce recuperata e donata a realtà senza fine di lucro equivalente a 1.330.546 pasti





Lotta allo spreco alimentare







6.4 Aumentare l'efficienza nell'utilizzo dell'acqua in ogni settore



delle imprese del campione hanno attivato processi **efficientamento** nell'uso della risorsa idrica

Processi di efficientamento idrico adottati:

85% riduzione nell'impiego della risorsa idrica 45% recupero e reimpiego **10% riciclaggio**



AZIONI AGENDA 2.0 CITTÀ METRO BOI OGNA

Tutela e valorizzazione della risorsa idrica, migliorando lo stato degli ecosistemi, incentivandone un utilizzo sostenibile anche mediante la riduzione dei consumi e degli sprechi









Uso efficiente dell'energia

7.2 Aumentare notevolmente la quota di energie rinnovabili nel mix energetico globale 7.3 Raddoppiare il tasso globale di miglioramento dell'efficienza energetica **9.4** Adozione di tecnologie pulite e rispettose dell'ambiente e dei processi industriali



II 67,9% delle imprese del campione hanno o si stanno dotando di impianti per la produzione di energia rinnovabile

Tipologia di impianto per la produzione di energia rinnovabile: **89%** fotovoltaico **12%** combustione 12% cogenerazione 5% biogas



II 60% delle imprese del campione negli ultimi cinque anni ha realizzato investimenti diretti a migliorare a propria prestazione energetica, per un totale di oltre 13 milioni di euro



Il **13%** del parco veicolare è green (ibrido, elettrico, a metano)



Il **21,4%** delle imprese del campione ha contratti di fornitura di energia elettrica con sole fonti rinnovabili



II 14% delle imprese ha un sistema di gestione dell'energia certificato **ISO 50001**



AZIONI AGENDA 2.0 CITTÀ METRO BOI OGNA

Incrementare la produzione, l'utilizzo e l'accumulo delle energie rinnovabili. Promuovere la rigualificazione energetica degli edifici







12.4 Ottenere la gestione ecocompatibile di sostanze chimiche e ridurre significativamente il loro rilascio in aria, acqua e suolo, al fine di minimizzare i loro effetti negativi sulla salute umana e l'ambiente





imprese del campione operanti nel food hanno linee di prodotti/ produzione biologiche





Cura di una sana alimentazione. Promozione di un'agricoltura sostenibile e altamente produttiva









12.5 Ridurre in modo sostanziale la produzione di rifiuti attraverso la prevenzione, la riduzione, il riciclo e il riutilizzo



imprese del campione hanno attivato progetti/processi di economia circolare, di cui l'88% realizzati «in filiera»

Tipologia di processi di economia circolare attivati:

56% recupero di sottoprodotti 50% riutilizzo 38% riciclaggio 13% recupero per produzione di energia



AZIONI AGENDA 2.0 CITTÀ METRO BOLOGNA

Promozione Centri del Riuso/ Second life. Accelerare il percorso di transizione per il superamento delle plastiche monouso/utilizzo più sostenibile della plastica. Sostenere l'economia circolare







9.5 Potenziare la ricerca scientifica, promuovere le capacità tecnologiche dei settori industriali in tutti i paesi aumentando il numero dei lavoratori dei settori ricerca e sviluppo



II 40% delle imprese del campione ha centri di ricerca e sviluppo



L' 80% delle imprese del campione ha attivato processi di digitalizzazione delle attività



II 33% delle imprese del campione ha collaborazioni con start up innovative



II 70% delle imprese del campione ha collaborazioni con centri di ricerca e università



II 30% delle imprese del campione ha attivato convenzioni o progetti con **Competence Center** o Digital Innovation Hub





Promozione dell'innovazione e della digitalizzazione













11.b Aumentare il numero di insediamenti umani che adottino e attuino politiche e piani integrati verso l'inclusione, l'efficienza delle risorse, la mitigazione e l'adattamento ai cambiamenti climatici



[orti e giardini urbani, cibo bio, botteghe artigiane, coworking, cultura, arte, innovazione sociale, lavoro, musica e sport]





Favorire processi di rigenerazione urbana



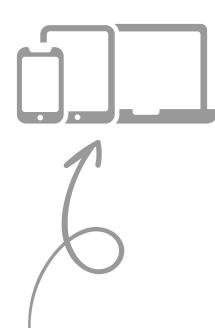






legacoop.bologna.it

scsconsulting.it







synesgy.com

LA CITTA' VERDE SOCIAL COOPERATIVE



- Activities and Figures
- Projects and Development
- Critical Points and Solutions
- Skills
- Contacts

ACTIVITIES AND FIGURES

WORK INSERTION OF DISADVANTAGED PEOPLE IN

- CONSTRUCTION AND MAINTANCE OF GREEN AREAS
- CONSTRUCTION AND MAINTANCE OF URBAN FURNITURE
- WASTE COLLECTION
- STREET CLEANING
- WASTE TREATMENT
- SOCIAL AGRICULTURE

WORKERS TOTAL 162 61 DISADVANTAGED WORKERS **TURNOVER** 9mln /€ YEARS OLD 33 **MW/YEAR** 224 PRODUCED 24k/lt LGP **METHANE 10**k/lt GASOLINE 21 K/It DIESEL 292K/lt

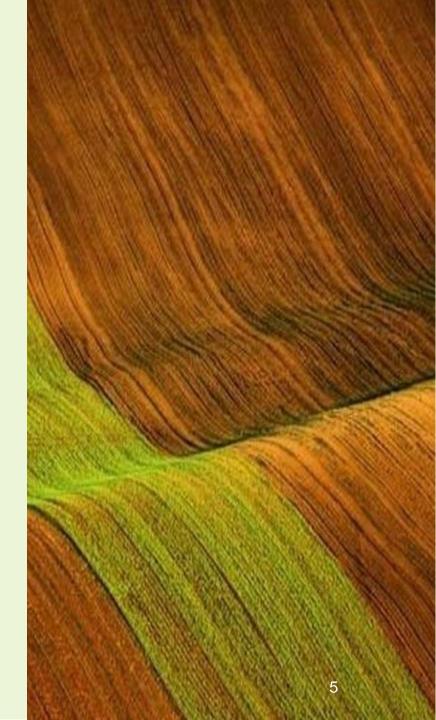


PROJECTS E DEVELOPMENT

SCHNEIDER ELECTRIC FOUNDATION

BUYSOCIRCULAR

□ DIGITALIZATION □ CLEAN FUELS □ PARTECIPATION IN GOVERNANCE □ RENEWABLE ENERGY □ BIOFUELS □ REUSE & RECYCLING **UPCYCLING** SOCIAL AND URBAN AGRICULTURE □ BIOCHAR?





CRITICAL POINTS & SOLUTIONS

PERSONS STRATEGY MONEY TECHNOLOGY

> TRAINING & RECRUITING TIME TO THINK TRUST AND REPUTATION KNOWLEDGE

> > . . .



SKILLS

MANAGING DIVERSITY

SEEKING BALANCE BUILDING CONNECTIONS



SOCIAL

NATURAL

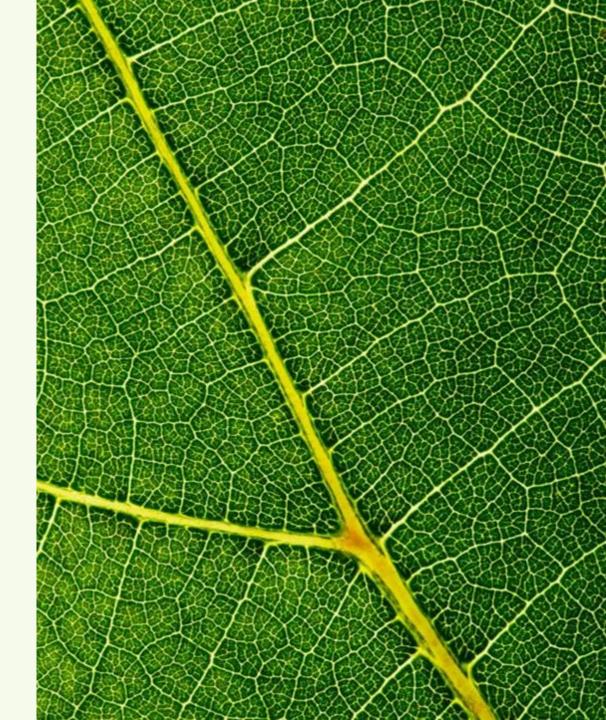
THANK YOU

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COMMUNICATE RESPONSIBILITY IN TIMES OF CLIMATE CRISIS

Bologna, Fondazione Barberini, Tuesday 23rd April



MISSION:

Since 1979 we have chosen to promote a responsible attitude towards the environment and future generations in society, to contribute to the diffusion of the culture of sustainable development with education, information and involvement.

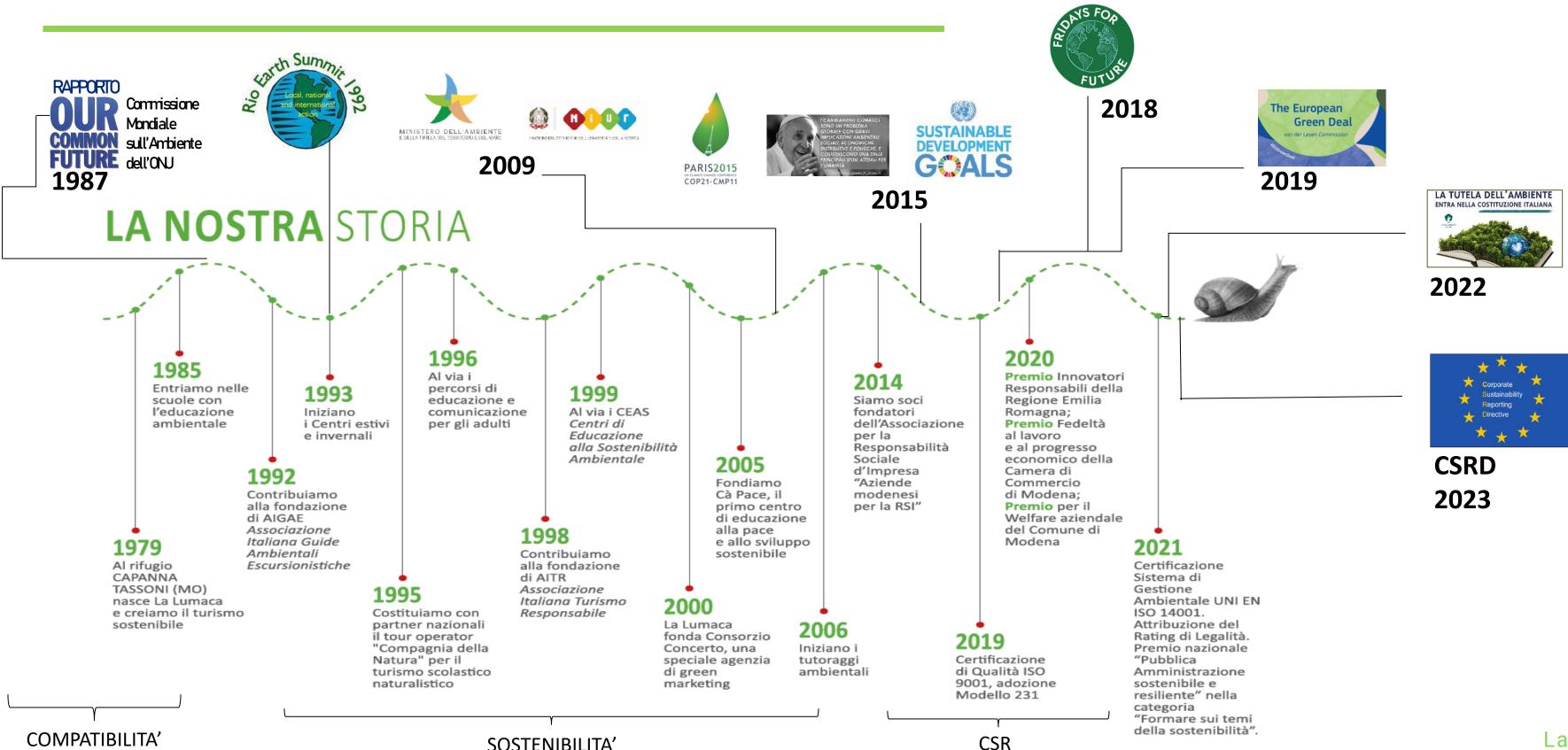
VISION:

We want to be in Italy, a point of reference for the culture of sustainability. An innovative company that wants to contribute with its services to making our area **a better place to live**.



SINCE 1979, PROCESSING IDEAS AND PROJECTS for sustainable development with services dedicated to citizens, consumers,

schools, public bodies and companies.



CSR

modifiche articoli 9 e 41 della Costituzione

SINCE 1979, PROCESSING IDEAS AND PROJECTS for sustainable development with services dedicated to citizens, consumers,

schools, public bodies and companies.

SETTORE **EDUCO**

Educazione alla sostenibilità

Comunicazione ambientale e CSR

Informazione territoriale

lalumaca Settori produttivi



TODAY:

- we educate over 70,000
 students of all levels in a large part of northern Italy on environmental issues.
- Every year we carry out over 150 environmental communication and information campaigns involving over 500,000 people



All to spread awareness of how limited the planet's resources are and how much, with our daily behaviors, we can contribute to improving or worsening the environment in which we live... but why all this attention?

- In 200 years we have gone from 1 to 8 billion.
- Each of us produces over 1.5 kg of waste.
- The global food system is responsible for 29% of greenhouse gas emissions, yet every year we waste a third of the food we produce.
- March 2024 the hottest ever. 2023 the hottest year ever.
- Extreme events due to a crazy climate are constantly growing. In ITALY +22% in 2023.
- We are losing several ecosystems (alpine glaciers, coral reefs, tropical forests, etc.).
- Overshoot day in Italy (19/5) and around the world (25/7)



PLANET EARTH FIRST



RESOURCES CONSUMPTION OVERSHOOT DAY IN ITALY AND IN THE WORLD

Country Overshoot Days 2024 When would Earth Overshoot Day land if the world's population lived like...





Fonte: Global Footprint Network 2024, www.overshootday.org



The new report from the UN Intergovernmental Panel on Climate Change (IPCC) calls for:

Act now.

If every year, **between now and 2030**, we continue to emit the same emissions that we produced in **2019**, it will be impossible to respect the objective of limiting the increase in the global average temperature to **below 1.5°C** above the levels

preindustrial....

Probably also to limit it below 2°C, as defined at **Cop21 in Paris**.

The same IPCC Report tells us that:

We are **culturally** very far from this awareness. **We need to change** an old mental paradigm that is based on 3 main obstacles:

 The poor climate culture widespread in our society.
 The lack of commitment from politics, local and global.
 The lack of sense of urgency.

EDUCATION & COMMUNICATION



Environmental education: educating young generations to be aware of how much their lifestyles can contribute to guaranteeing a better future.

Environmental communication: Actions to disseminate and share data, guarantee information, involvement and adherence of citizens to good practices (ecosustainable behaviour).

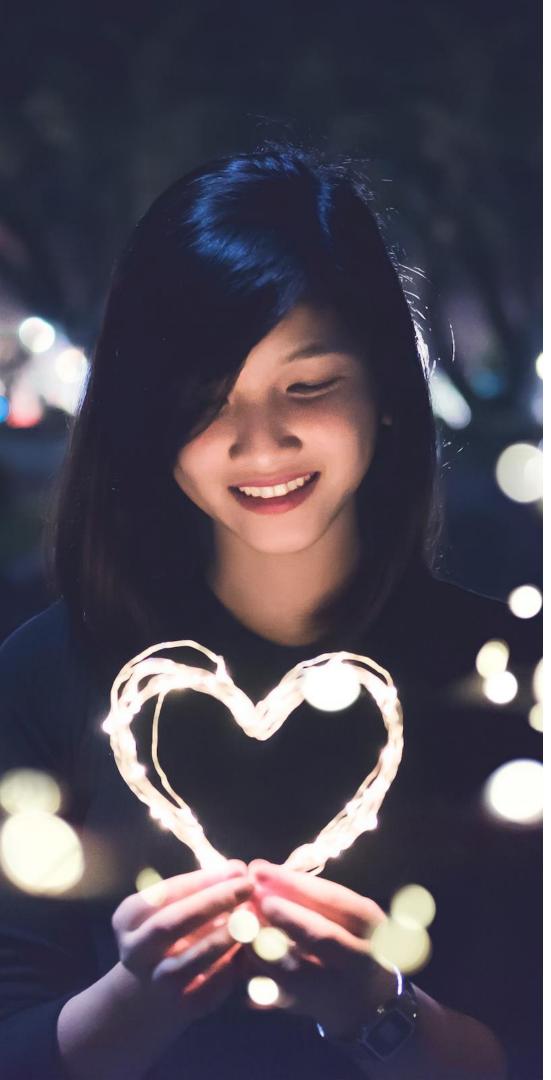
Green Marketing: actions to increase business profitability in the short and medium term. Increase sales of a good or service by enhancing its aspects of compatibility with sustainable development towards the consumer.

CSR: bringing sustainability within the company to increase its value in the long term. Create a close connection between sustainability and brand identity to create a relationship with the consumer.



Businesses, as part of society, must also contribute to the well-being of the community in which they operate. Carrying out and communicating CSR activities offers them the opportunity to fulfill this social responsibility, considering the impact of their actions on the environment and society. The involvement of businesses is indeed crucial to address large-scale challenges and achieve sustainable development goals.





6 GOOD REASONS TO COMMUNICATE YOUR SUSTAINABILITY

- **1. A legal obligation** for some, an opportunity for all \rightarrow Trust relashionships
- 2. Credit lines \rightarrow easier access to credit
- 3. Financial operators/investors reward sustainable $companies \rightarrow$ (+attractive +worthy of investment)
- 4. Market: large retail chains require ESG data \rightarrow

Export/Consumers/reputation

- **5.** Calls: rewards for accessing resources \rightarrow PSR, PNRR, CCIAA
- 6. Awareness of one's impacts: knowing oneself better and investing in cost reduction \rightarrow Benchmarking

BUT HOW DO YOU MAKE GOOD COMMUNICATION?

CONTINUITY

PATH

COHERENCE

ENGAGEMENT



WATCH TOGETHER SOME EXAMPLES?





COMMUNICATE THE PROJECT "ZERO LANDFILL" - ELECTROLUX

Alle State Bas -

Actions:

- "Ri-cubi" setup
- Ambient Mktg canteen «Lava-Zero»
- Videos, signage and training
- Butterfly effect murals





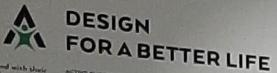
IMMERSIVE MURALS FOR SUSTAINABILITY

The mural (12X5) represents the butterfly effect whereby many small daily behaviors can make a difference, improving life on Earth.

5 ECO-ACTIONS

- -Urban reforestation
- -Water saving
- -Energy saving
- -Sustainable mobility
- -Electrolux washing machine





THE FOUR ACTIONS OF ACTIVE SURFACES®

AN ECOVILLAGE FOR GREEN SANTA CLAUS

On the occasion of Christmas, Iris **Ceramica Group** has chosen to celebrate together with its employees and their families by adapting the Christmas theme to aspects of environmental sustainability.

- Creation of Christmas decorations and cards with recycled material
- Role playing games to learn to be more sustainable
- Environmental themed theater show
- Green Christmas story telling
- Active Hero, the environmental education project on the theme of wellbeing.

PIANETA SOSTENIBILITÀ

CERAMICA



Appuntamenti ambientali per grandi e piccini



Calendario di eventi, laboratori ed escursioni per dipendenti e famiglie

Pianeta Sostenibilità FONDAZIONE

DAL 26 MARZO **AL 18 GIUGNO 2022**

IRIS

CERAMICA

COSA

GREEN FAMILY DAY







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Teatro ambientale, autoproduzione eco-aperitivi, laboratori creativi per bambini e famiglie dei soci

GREEN FAMILY DAY



Avanguardia | Cultura | Territorio





Caccia al tesoro sui temi dell'Agenda 2030, animazioni e laboratori creativi per dipendenti e famiglie

COSA

A BEER FOR A PLASTIC BOTTLE



In Milan, a huge wave made from 15 cubic meters of recycled plastic draws attention to ocean pollution.

Headline: «There is no place for plastic in heaven».

Purpose: to encourage the recycling of plastic bottles by placing them in a specific container. In exchange you receive a coupon for a free beer in the bars participating in the initiative.

Raise awareness of the problem of plastic pollution Improve your image Have your product tasted and increase customers



THE PROMOTION OF PRODUCT SUSTAINABILITY

Purpose: Promote the recyclability and sustainability of the Tetra Pak beverage container and its recycling and recovery supply

chain

Actions:

- Environmental communication and information campaigns in co-marketing with PA and Partners
- Product marketing sampling
- Green social marketing (Tiriciclo and Naturally)
- Teaching kits for schools, photo contests and video contests, EcoTeatro
- Green number

3.500 ITALIAN MUNICIPALITIES INVOLVED - 23 million PEOPLE REACHED - 500 territorial campaigns since 2005





Rubiera Plogging with Tetra Pak Abandoned waste? We gather together.

Partly for sport, partly for the Planet. It is plogging, or rather the collection of waste abandoned while running or walking, a collective event dedicated to outdoor well-being and respect for the environment.

Born in Sweden a few years ago, today a global movement.

Rubiera Plogging. Insieme possiamo fare la differenza.



SAPERE COOP: EDUCATION ON CONSCIOUS CONSUMPTION - Coop Alleanza 3.0

Purpose: Create Aw Alleanza 3.0 stores:

years.

Actions: Create educational paths with schools of all levels with engaging teaching methodologies that talk about critical consumption and conscious spending.

Purpose: Create Aware Consumer Education courses at Coop

Alleanza 3.0 stores:70,000 pupils; 3,400 educational paths; over 40



ENVIRONMENTAL WEBINAR

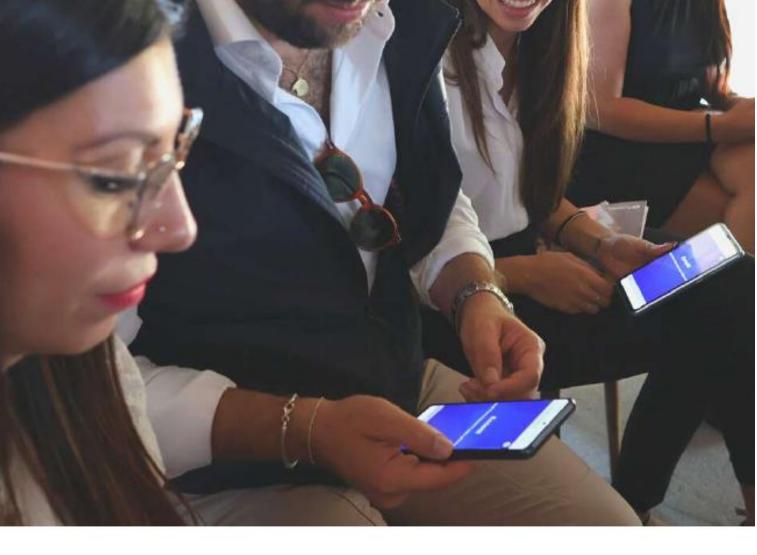
development issues.

- Communicate your responsibility through the training of your employees, collaborators, stakeholders and partners on sustainable
- CONTINUOUS ON AND OFFLINE TRAINING

QUIZ BILANCIO Sostenibilità







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Sfida quiz per presentare il bilancio di sostenibilità ai dipendenti



THANK YOU.

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Guido Ricci



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"Da più di 40 anni facciamo delle nostre convinzioni il nostro lavoro, del nostro stile di vita una professione."



Participants list – 23rd April 2024

Ν.	NAME AND SURNAME	ORGANISATION
1	Adam Markuszewski	FISE
2	Elena Scanferla	CSA COESI
3	Elsa Brander	Kooperationen
4	Erdmuthe Klaer	REVES aisbl
5	Fabiola di Fazio	DEMETRA
6	Giorgio Rosso	La città Verde
7	Guido Ricci	La Lumaca
8	Helena Glæesborg Hansen	Kooperationen
9	Julia Koczanowicz-Chondzynska	FISE
10	Laura Zambrini	DEMETRA
11	Luigi Martignetti	REVES aisbl
12	Marco Mazzoli	Cons.coop.e.r.
13	Peter Kellermann Brandorff	Kooperationen
14	Roberta Trovarelli	Legacoop ER
15	Rosaria Mastrogiacomo	Legacoop ER
16	Sara Belloi	Legacoop ER
17	Simone Fabbri	Legacoop Bologna
18	Ulrik Boe Kjeldsen	Kooperationen
19	Urszula Fila-Kicman	FISE
20	Valentina Dragone	DEMETRA
21	Marco Orlandini	Eco 2000
22	Andrea Nalin	Indici Opponibili soc. coop.

