Telling Your CSR Impact Story: An Outcomes Framework for a Portfolio of Programs

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Agenda

I. Welcome and Introductions
II. Clarifying Your Goals
III. Creating an Outcomes Framework
IV. Prioritizing Data Collection
V. Connecting to Your Communications Strategy
VI. Session Worksheets
I. Welcome and Introductions
About Us

• At TCC Group, we are committed to addressing **complex social problems** by heightening our clients’ understanding of their **collaborative role in society** and helping them strengthen strategy, build capacity, and advance assessment and evaluative learning.

• **We partner with companies and foundations** to help design and develop their strategic approach.

• Our knowledge and expertise in the social impact sector helps our clients **create high impact strategies and programs** addressing a range of important issues.
Our Corporate Clients
II. Clarifying Your Goals
TCC’s Corporate Citizenship Framework

Mission / Vision / Purpose

- Purpose
- Community
- Operations
<table>
<thead>
<tr>
<th>Description</th>
<th>Stakeholders</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td>Global / national stakeholders; employees, customers, advocacy groups</td>
</tr>
<tr>
<td>The company’s mission and what the company stands for.</td>
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<tr>
<td><strong>Community</strong></td>
<td>Community leaders, employees, local nonprofits</td>
</tr>
<tr>
<td>The relationship with the community where the company operates and where employees live and work.</td>
<td></td>
</tr>
<tr>
<td><strong>Operations</strong></td>
<td>Regulators, community leaders, employees, advocacy groups</td>
</tr>
<tr>
<td>The issues relating to the company operations including environmental impact, workplace, diversity, etc.</td>
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</tbody>
</table>
Certain themes appear across the pharmaceutical industry’s approach to corporate citizenship/corporate social responsibility.

**Purpose**
= Healthcare Access

Commitment to reducing health disparities and providing equitable solutions to all populations vis-à-vis strengthening R&D and delivering medicines that society values to prevent and treat disease.

**Community**
= People and Community

Commitment to create an inclusive and diverse workforce in addition to supporting communities where employees live and work.

**Operations**
= Environmental Sustainability

Recognizing the connection between health and the environment, and committing to environmentally sustainable operations.
Mission
The Unilever Sustainable Living Plan will help us double the size of our business while reducing our environmental footprint and increasing our positive social impact.

- **Purpose** = Improving Health and Well-being
- **Operations** = Reducing Environmental Impact
- **Community** = Enhancing Livelihoods
Unilever: Strategic Priorities

Improving Health and Well-being

By 2020 we will help more than a billion people take action to improve their health and well-being.

- Health & Hygiene
- Improving Nutrition

Reducing Environmental Impact

By 2020 our goal is to halve the environmental footprint of the making and use of our products as we grow our business.

- Greenhouse Gases
- Water
- Waste
- Sustainable Sourcing

Enhancing Livelihoods

By 2020 we will enhance the livelihoods of millions of people as we grow our business.

- Fairness In The Workplace
- Opportunities For Women
- Inclusive Business
Unilever: Goals

Improving Health and Well-being

Health & Hygiene

By 2020 we will help more than a billion people to improve their health and hygiene. This will help reduce the incidence of life-threatening diseases like diarrhea.

***

- 397 million people reached by end 2014
- Reduce diarrhea and respiratory disease through hand washing
- Provide safe drinking water
- Improve access to sanitation
- Improve oral health
- Improve self-esteem

Improving Nutrition

By 2020, we will double the proportion of our portfolio that meets the highest nutritional standards, based on globally recognized dietary guidelines. This will help hundreds of millions of people to achieve a healthier diet.

***

- 33% of our portfolio by volume met highest nutritional standards in 2014
- Reduce salt levels
- Saturated fat: Reduce saturated fat, reduce essential fatty acids, reduce saturated fat in more products, improve heart health, remove trans fat, reduce sugar
- Reduce calories: in children’s ice cream, in more ice cream products, provide healthy eating information
### Greenhouse Gases

**Our products’ lifecycle:** Halve the GHG impact of our products across the lifecycle by 2020.

**Our manufacturing:** By 2020 CO2 emissions from energy from our factories will be at or below 2008 levels despite significantly higher volumes.

***

- 4% - our GHG impact per consumer use has increased by around 4% since 2010

- 37% reduction of CO2 from energy per ton of production since 2008

- Reduce GHG from manufacturing: renewable energy, new factories, reduce GHG from skin cleansing and hair washing

- Reduce GHG from washing clothes: concentration, reformation, consumer behavior, reduce GHG from transport, etc.

### Water

**Our products in use:** Halve the water associated with the consumer use of our products by 2020.

**Our manufacturing:** By 2020 water abstraction by our global factory network will be at or below 2008 levels despite significantly higher volumes.

***

- 2% - our water impact per consumer use has reduced by around 2% since 2010

- 32% reduction in water abstraction per ton of production since 2008

- Reduce water use in manufacturing process: new factories

- Reduce water use in the laundry process: easy rinse products, products that use less water, reduce water use in skin cleansing and hair washing, reduce water use in agriculture
Unilever: Goals
Reducing Environmental Impact (Part 2)

**Waste**

- **Our products:** Halve waste associated with the disposal of our products by 2020.
- **Our manufacturing:** By 2020 total waste sent for disposal will be at or below 2008 levels despite significantly higher volumes.
  
- 12% - our waste impact per consumer use has reduced by around 12% since 2010
- 85% reduction in total waste per ton of production since 2008

- Reduce waste from manufacturing: zero non-hazardous waste to landfill, new factories, etc.
- Recycle packaging: Increase recycling and recovery rates, increase recycled content, reuse packaging, etc.
- Reduce office waste: recycle, reuse, recover, reduce paper consumption, etc.

**Sustainable Sourcing**

- **By 2020 we will source 100% of our agricultural raw material sustainably.**
  
- 55% of agricultural raw materials sustainably sourced
  
- **Palm oil:** sustainable and traceable
- **Paper and board**
- **Soy beans and soil oil, tea, fruit, vegetables, sugar, sunflower oil, rapeseed oil, dairy**
- **Fairtrade Ben & Jerry’s**
- **Cage-free eggs**

- Increase in sustainable sourcing of office materials
## Unilever: Goals

### Enhancing Livelihoods

<table>
<thead>
<tr>
<th><strong>Fairness in the Workplace</strong></th>
<th><strong>Opportunities for Women</strong></th>
<th><strong>Inclusive Business</strong></th>
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<tbody>
<tr>
<td><strong>By 2020 we will advance human rights across our operations and extended supply chain.</strong></td>
<td><strong>By 2020 we will empower 5 million women.</strong></td>
<td><strong>By 2020 we will have a positive impact on the lives of 5.5 million people</strong></td>
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<tr>
<td>85% of our strategic suppliers met our Responsible Sourcing Policy’s mandatory criteria by March 2015, covering around 80% of our spend</td>
<td>238,000 women provided with access to training and skills, including 70,000 Shakti micro-entrepreneurs trained in India</td>
<td>397 million people reached by end 2014</td>
</tr>
<tr>
<td>Implement UN Guiding Principles on Business and Human Rights</td>
<td>Build a gender-balanced organization with a focus on management</td>
<td>Reduce diarrhea and respiratory disease through hand washing</td>
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<tr>
<td>Source 100% of procurement spend in line with our Responsible Sourcing Policy</td>
<td>Promote safety for women in communities where we operate</td>
<td>Provide safe drinking water</td>
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<tr>
<td>Create a framework for fair compensation</td>
<td>Enhance access to training and skills</td>
<td>Improve access to sanitation</td>
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<td>Improve employee health, nutrition and well-being</td>
<td>Expand opportunities in our value chain</td>
<td>Improve oral health</td>
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<td>Reduce workplace injuries and accidents</td>
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<td>Improve self-esteem</td>
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Clarifying Your Goals - Process

**Develop Draft Framework**
- Is there a framework in place?
- How would you define your pillars and issue areas?

**Determine Accountability for Issue Goals**
- Which goals are you accountable for?
- Where can you play a supporting and/or partnering role?

**Develop Your Goals**
- Identify priority stakeholders for each goal
- Determine their social impact expectations (existing research; surveys; focus groups)
- Develop realistic goals taking into consideration budget and resource availability (internal and external), company and leadership commitment
III. Creating an Outcomes Framework
What is an Outcomes Framework?

A framework that clearly maps out the desired benefits (outcomes) that the initiative/program is trying to achieve, the causal links to achieving those outcomes, and the measurements that will be used to assess progress towards the end goal.
Why do we use an Outcomes Framework?

- Clarify our strategy and desired outcomes
- Test a series of hypotheses or working assumptions about our program
- Learn about the program and refine its design and activities
- Understand which partners make the best fit for achieving our goals
- Show the connection of the work to the company
- Tell the story of the work
Components of an Outcomes Framework

Logic Model/ Theory of Change
A systematic and visual way to present relationships among the resources you have to operate your program, the activities you plan to do, and the changes or results you hope to achieve.

Set of Core Indicators
Data which provide an indication of performance in terms of an agreed vision of success.
How do I get started on an outcomes framework?

Build your logic model.
Building Your Logic Model - Program Portfolio Level

Start with your goal.

Impact

West Harlem students graduate from high school prepared for college and/or career
Then build the logical sequences that must occur to reach your goal.
Now think about the types of interventions that will help create these initial desired changes.
Now add in the investments that you will make to support these interventions.
Your Completed Logic Model

ABC Foundation's Logic Model

What You Invest

Inputs
- Foundation staff
- Funding
- Community-based organizational partners
- Infrastructure - meeting place, etc.

Strategies
- Student direct supports - academic
- Student direct supports - social/emotional

The Changes You Want to See

Short-term Outcomes
- Increased positive academic behaviors
- Increased school and community engagement
- Increased positive attitudes towards school, careers

Medium-term Outcomes
- Increased academic performance
- Increased motivation/aspirations

Long-term Outcomes
- Increased on-time grade promotion
- Increased college/career readiness

Impact
- West Harlem students graduate from high school prepared for college and/or career
ABC’s Business Impact Logic Model

**What You Invest**

- Company staff
- Funding
- Community-based organizational partners
- Infrastructure - meeting place, etc.

**Strategies**

- Employees invest their time and money in communities
- Company ABC invests its time and money in communities

**Short-term Outcomes**

- Increased company presence in customer communities
- Increased employee morale
- Increased employee participation and development

**Medium-term Outcomes**

- Increased brand exposure
- Enhanced employee job performance
- Increased employee job satisfaction

**Long-term Outcomes**

- Strengthened position as community member
- Increased coordination between community investment and other business departments
- Increased business effectiveness and efficiency

**Impact**

Business Value for ABC Company
Considerations for Logic Model Development

- Work with internal stakeholders
- Work with grantees or external partners
- Build on existing evidence
- You can have more than one logic model
- Logic models are not meant to be static
IV. Prioritizing Data Collection
Your wishlist - What is one type of data that you wish you had?

With which audience would you share that data?
Prioritize sections of the logic model according to:

- Importance
- Feasibility to collect data
- Usability
Developing a Set of Core Indicators

- Can be aggregated across grantees
- Give a strong indication of outcome achievement
- Can be mix of qualitative and quantitative

**Examples:**
- % of students with increased positive attitudes towards school
- % of students with increased positive attitudes towards career
- % of students with prosocial behaviors
- % of students with leadership skills
- Students’ experience with program
## Aligning Your Core Indicators with Data Sources

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Data Source</th>
<th>Timeframe</th>
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</thead>
<tbody>
<tr>
<td>% of students with increased positive attitudes towards school</td>
<td>Education portfolio grantees</td>
<td>Annually</td>
</tr>
<tr>
<td>% of students with increased positive attitudes towards career</td>
<td>Education portfolio grantees</td>
<td>Annually</td>
</tr>
<tr>
<td>% of students with prosocial behaviors</td>
<td>Education portfolio grantees</td>
<td>Bi-annually</td>
</tr>
<tr>
<td>% of students with leadership skills</td>
<td>“Youth Leaders” initiative grantees</td>
<td>Annually</td>
</tr>
<tr>
<td>Students’ experience with “Youth Leaders” initiative</td>
<td>“Youth Leaders” initiative grantees</td>
<td>Annually</td>
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</tbody>
</table>
V. Connecting to Your Communications Strategy
Unilever – Progress in 2015

**Improving Health and Well-being for More than 1 Billion**

- Reduced cardiac and respiratory health burdens
- Prevents 200,000 deaths
- Prevents 40,000 cases of diarrhea
- Reduces mortality from Chagas disease

**Reducing Environmental Impact by 1/2**

- 6% reduction in water footprint
- 1% reduction in energy use per consumer
- 29% waste impact per consumer
- 60% of packaging to be made from sustainable material

**Health and Hygiene**

- We will work to improve the health and wellness of billions of people through our products, our commitment to healthy eating, and our efforts to improve access to clean water.
- By 2020, we will work to improve the health and well-being of at least 6 billion people.

**Greenhouse Gases**

Our products’ lifecycle greenhouse gas emissions (GGE) have been reduced by 6% in 2015.

- 1% reduction in the environmental impact of our products per consumer
- 43% reduction in the environmental impact of our products per consumer
- 5% reduction in the environmental impact of our products per consumer

**Water**

Our products use 20% less water than we use in the drinking water.

- 1% reduction in the environmental impact of our products per consumer
- 5% reduction in the environmental impact of our products per consumer
- 10% reduction in the environmental impact of our products per consumer

**Waste**

Our products use 20% less waste than we use in the drinking water.

- 1% reduction in the environmental impact of our products per consumer
- 5% reduction in the environmental impact of our products per consumer
- 10% reduction in the environmental impact of our products per consumer

**Sustainable Sourcing**

- 60% of packaging to be made from sustainable material
- 54% of agricultural and forestry inputs sourced sustainably

**Fairness in the Workplace**

- 800,000 employees engaged in opportunities for personal development and career advancement
- 2.4 million women involved in social and economic activities

**Inclusive Business**

- 15% of all our suppliers are women-owned businesses
- 10% of all our suppliers are owned by women

Unilever: Communicating Success to Date

**Health and Hygiene**
By 2020 we will help more than a billion people to improve their health and hygiene. This will help reduce the incidence of life-threatening diseases like diarrhoea.

- 482M+ people reached by end 2015
- Reduce diarrhoeal and respiratory disease through handwashing
- Provide safe drinking water
- Improve access to sanitation
- Improve oral health
- Improve self-esteem

**Water**
Our products in use:
- Halve the water associated with the consumer use of our products by 2020.
- -1%† our water impact per consumer use has reduced by around 1% since 2010*

Our manufacturing:
- By 2020 water abstraction by our global factory network will be at or below 2008 levels despite significantly higher volumes.
- -37%† reduction in water abstraction per tonne of production since 2008

**Opportunities for Women**
By 2020 we will empower 5 million women.
- 800,000 women enabled to access initiatives aiming to develop their skills
- Build a gender-balanced organisation with a focus on management
- Promote safety for women in communities where we operate
- Enhance access to training and skills
- Expand opportunities in our value chain

*Includes all products in use.†Excludes all applications. DWS: Skyscraper 2009.
# Creating a Reporting Plan

<table>
<thead>
<tr>
<th>Audience</th>
<th>Report Type</th>
<th>Core Indicators</th>
<th>Timing</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Board</strong></td>
<td>Dashboard</td>
<td>Investment $s, # volunteers, Outputs, ST and MT Outcomes</td>
<td>January, July</td>
<td>Alexandra</td>
</tr>
<tr>
<td><strong>Executive Leadership Team</strong></td>
<td>Bi-annual progress report</td>
<td>Investment $s, # volunteers, Outputs, ST and MT Outcomes</td>
<td>June, December</td>
<td>Alexandra</td>
</tr>
<tr>
<td><strong>Employees</strong></td>
<td>Internal newsletter</td>
<td>Investment $s, # volunteers, volunteer stories</td>
<td>January, April, July, October</td>
<td>Entire team</td>
</tr>
<tr>
<td><strong>External public and partners</strong></td>
<td>Website stories</td>
<td>Grantee and volunteer stories</td>
<td>January, July</td>
<td>Entire team</td>
</tr>
<tr>
<td><strong>External public and partners</strong></td>
<td>Annual report</td>
<td>Dashboard metrics, sample of grantee and volunteer stories</td>
<td>December</td>
<td>Mary with Communications team</td>
</tr>
<tr>
<td><strong>CSR Team</strong></td>
<td>Internal Review</td>
<td>All progress indicators, grantee feedback</td>
<td>December</td>
<td>Entire team</td>
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</table>
The biggest thing I’ve learned from the Youth Leaders program is to believe in myself. I want to be a biologist when I grow up.”

--Ariana, age 11

“Ariana’s attitude about school has changed since she’s been a part of the Youth Leaders program. She is now interested in getting her homework done rather than running to play video games after school.” – Ariana’s mom
Key Results Statements for ABC Foundation’s FY13 Funding Cycle

- ABC Foundation provided 2,500,000 meals to 50,000 children nationwide through its 2012-2013 grantmaking.

- ABC Foundation funded nutrition education classes for more than 175,000 children and 14,000 adults.

- Through ABC Foundation’s support, summer food programs in Indiana served more than twice as many children as last year.

- ABC Foundation’s funding catalyzed more than 20,000 volunteer hours in the fight against child hunger during 2012-2013.

- ABC Foundation was recognized in at least 130 forms of media and garnered over 80,000,000 media impressions.
VI. Session Worksheets
Clarifying Your Goals

Share your Mission / Vision:

- **Purpose**
- **Community**
- **Operations**

How might you define these three pillars?

List all of the issue areas / initiatives underneath each pillar.

Identify the measurable goals for each issue area.
UPON COMPLETION OF YOUR LOGIC MODEL—Circle your priority areas based on: importance; feasibility to collect data; and usability.
Develop a Set of Core Indicators

For each priority area that you circled in your logic model, identify the core indicator(s) for each. Core indicator(s) are data that provide an indication of performance in terms of an agreed vision of success.

Core indicators: 1) can be aggregated across grantees; 2) give a strong indication of outcome achievement; and 3) can be a mix of qualitative and quantitative data (e.g., short-term outcomes, investment dollars, grantee stories).

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<tr>
<td>EXAMPLE: CSR Team</td>
<td>Internal Review</td>
<td>All progress indicators, grantee feedback</td>
<td>December</td>
<td>Entire team</td>
</tr>
<tr>
<td>A Checklist for Building Your Outcomes Framework</td>
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<thead>
<tr>
<th>Goal Clarity</th>
<th>Logic Model</th>
<th>Data Prioritization</th>
<th>Data Collection Plan</th>
<th>Reporting Plan &amp; Results Integration</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Goals are driven by our stakeholders.</td>
<td>- We’ve articulated the outcomes needed to reach our end goal.</td>
<td>- Our core indicators are important data points for understanding if outcomes are being achieved.</td>
<td>- We’ve identified the data sources and timeframes for each of our core indicators.</td>
<td>- We have a reporting plan to help organize what/how/when we will report to our key stakeholders.</td>
</tr>
<tr>
<td>- Goals are specific and clear.</td>
<td>- Our logic model shows clear and logical linkages from left to right.</td>
<td>- Our core indicators take into account data needs of our key stakeholders.</td>
<td>- We also allow for program-specific metrics.</td>
<td>- We have included ourselves as a key stakeholder and have a plan for collecting qualitative data (e.g., quotes, individual stories) where useful.</td>
</tr>
<tr>
<td>- Goals are measurable.</td>
<td>- We’ve identified the level of changes we are seeking (individual, organizational, system-level).</td>
<td></td>
<td>- We have a plan for collecting qualitative data (e.g., quotes, individual stories) where useful.</td>
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</tr>
<tr>
<td>- Goals are attainable within our timeline.</td>
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<td>- Our core indicators are feasible to collect data on.</td>
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<tr>
<td>- Goals are relevant to what we need to achieve.</td>
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<tr>
<td>- Reasonable timeframe on our goals.</td>
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THANK YOU

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