



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

- 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



MONSANTO



II. Clarifying Your Goals

Mission / Vision / Purpose

Purpose






Community



Operations



Drivers for Corporate Citizenship

	Description	Stakeholders
	The company's mission and what the company stands for.	Global / national stakeholders; employees, customers, advocacy groups
	The relationship with the community where the company operates and where employees live and work.	Community leaders, employees, local nonprofits
	The issues relating to the company operations including environmental impact, workplace, diversity, etc.	Regulators, community leaders, employees, advocacy groups

Sample Industry - Pharmaceutical

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

Unilever: Goals

Reducing Environmental Impact (Part 1)

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 soya 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

Fairness in the Workplace

By 2020 we will advance human rights across our operations and extended supply chain.

85% of our strategic suppliers met our Responsible Sourcing Policy's mandatory criteria by March 2015, covering around 80% of our spend

Implement UN Guiding Principles on Business and Human Rights

Source 100% of procurement spend in line with our Responsible Sourcing Policy

Create a framework for fair compensation

Improve employee health, nutrition and well-being

Reduce workplace injuries and accidents

Opportunities for Women

By 2020 we will empower 5 million women.

238,000 women provided with access to training and skills, including 70,000 Shakti micro-entrepreneurs trained in India

Build a gender-balanced organization 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

Inclusive Business

By 2020 we will have a positive impact on the lives of 5.5 million people

397 million people reached by end 2014

Reduce diarrhea and respiratory disease through hand washing

Provide safe drinking water

Improve access to sanitation

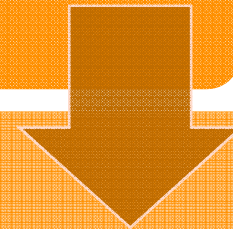
Improve oral health

Improve self-esteem

Clarifying Your Goals - Process

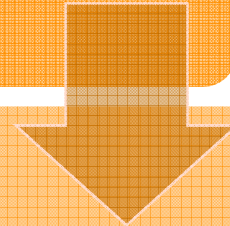
Develop Draft Framework

- 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?



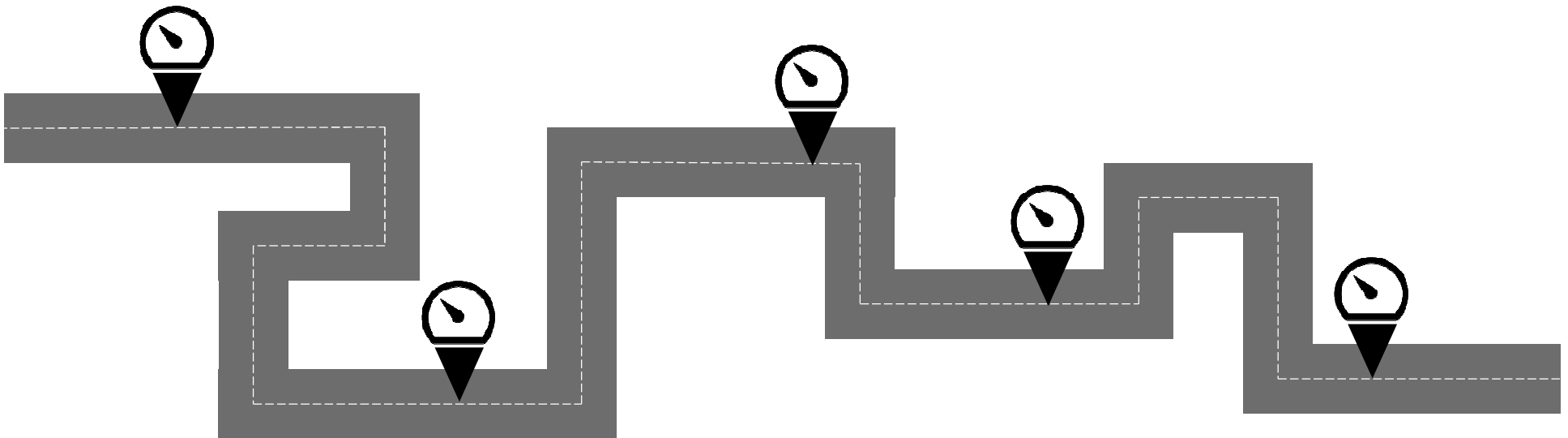
Develop Your Goals

- 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?

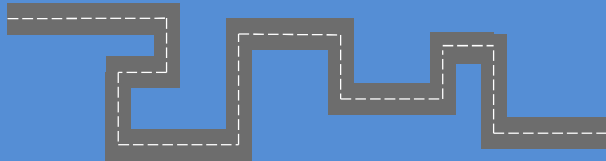
A framework that clearly maps out the **desired benefits (outcomes)** that the initiative/program is trying to achieve, the **causal links** to achieving those outcomes, and the **measurements** that will be used to assess progress towards the end goal.



| 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

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



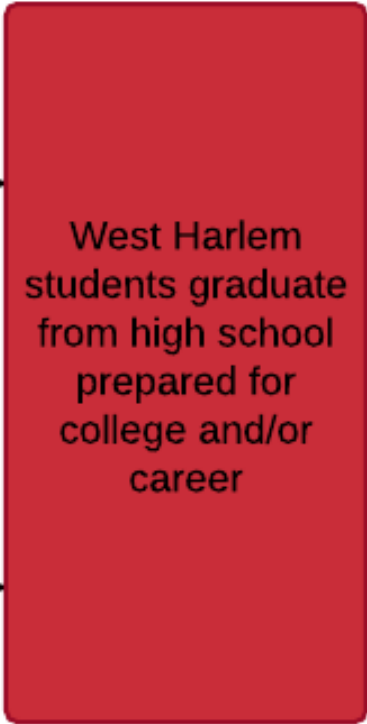
Data which provide an **indication of performance** in terms of an agreed vision of success.

How do I get started on an outcomes framework?

Build your logic model.

Start with your goal.

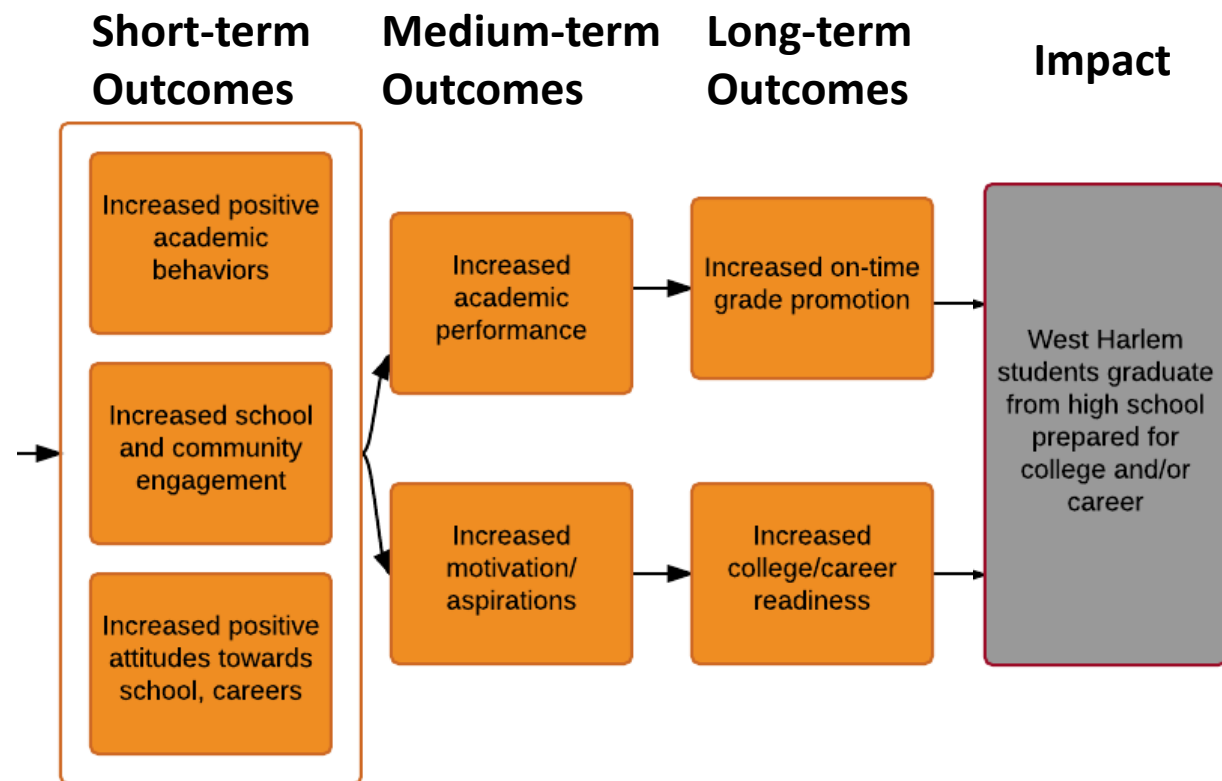
Impact

A large red rectangular box with rounded corners. Inside the box, the text "West Harlem students graduate from high school prepared for college and/or career" is written in black. Two small black arrows point from the left side of the box towards the text.

West Harlem
students graduate
from high school
prepared for
college and/or
career

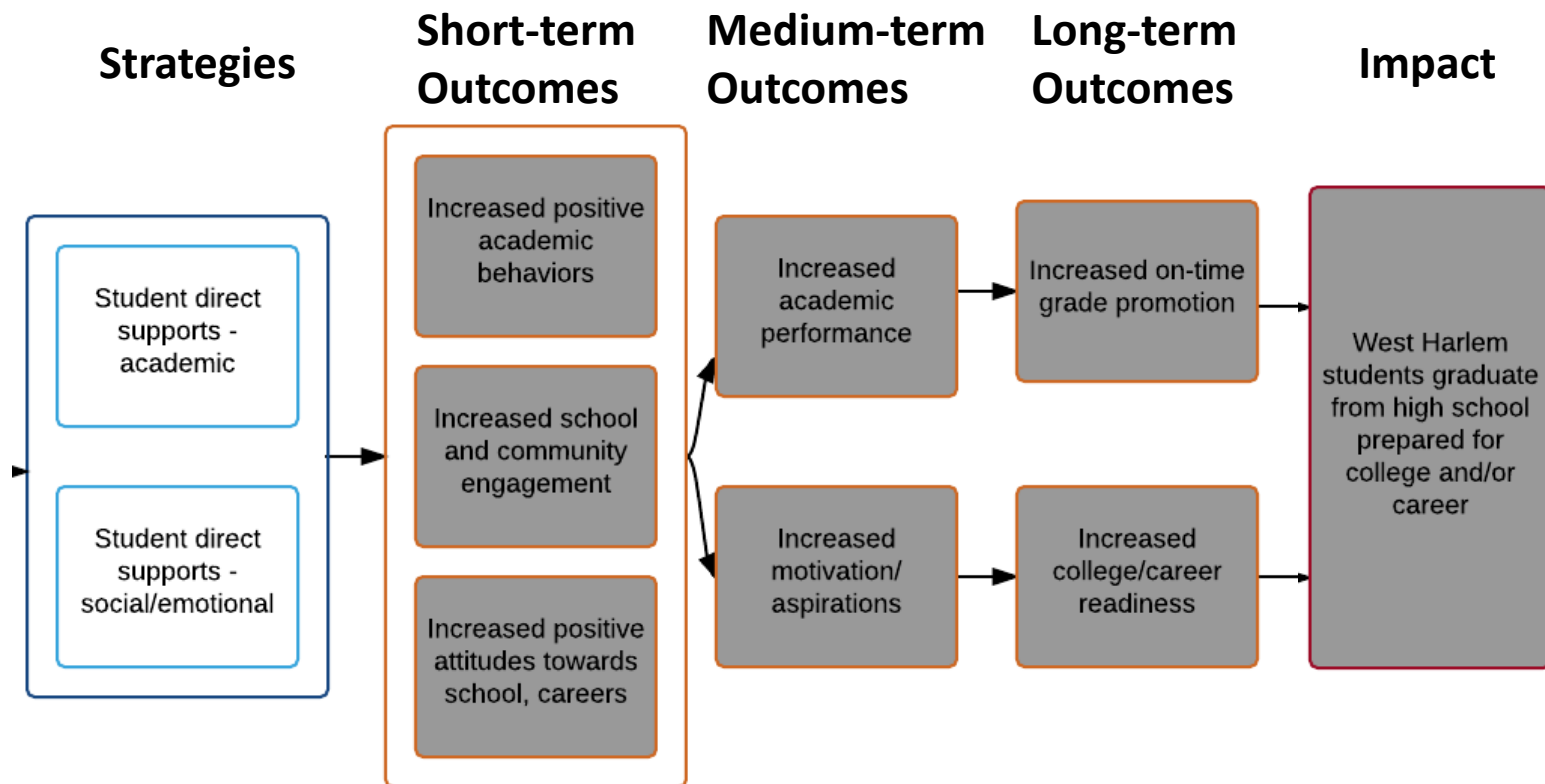
Building Your Logic Model- Program Portfolio Level

Then build the logical sequences that must occur to reach your goal.



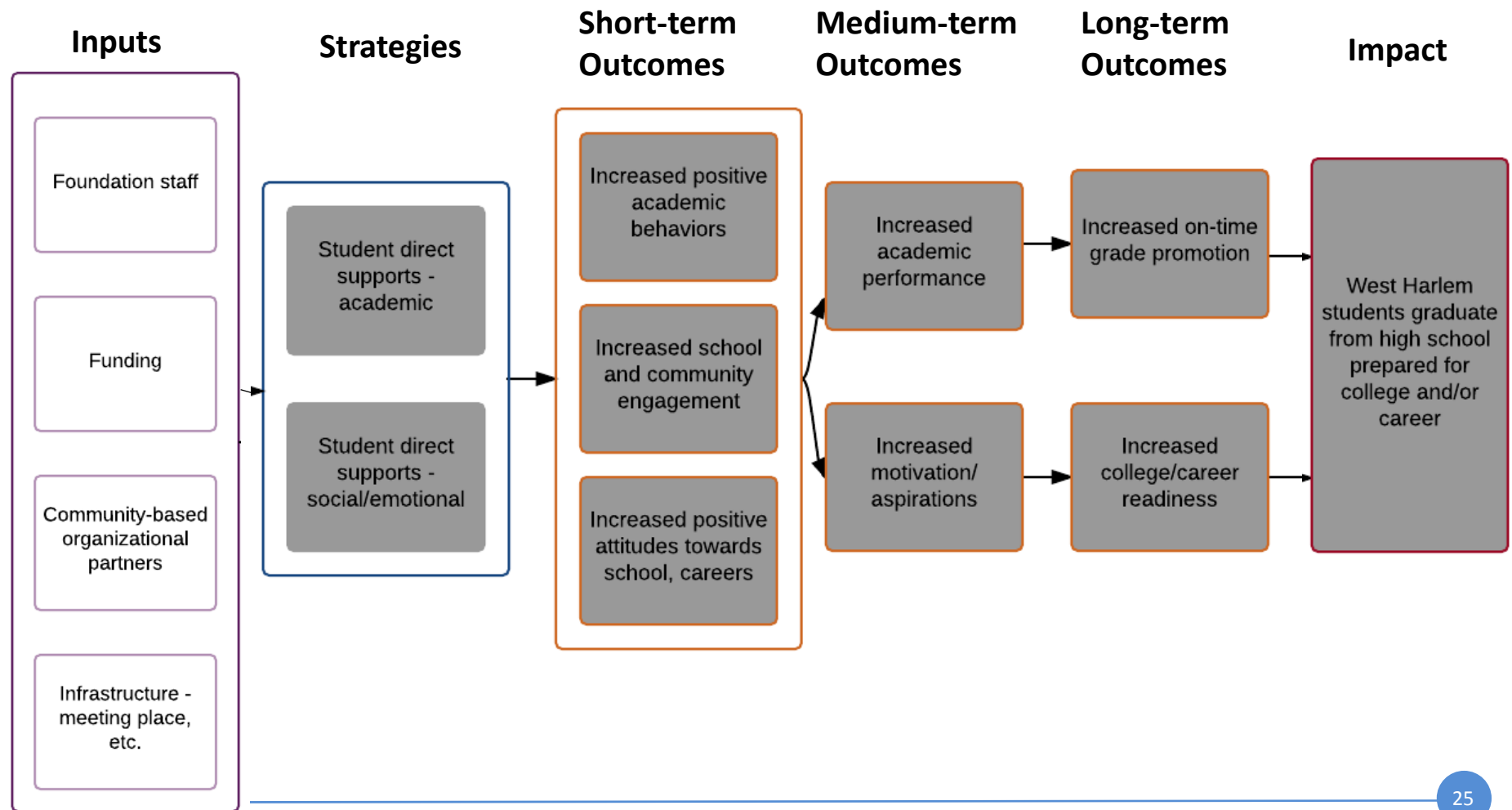
Building Your Logic Model- Program Portfolio Level

Now think about the types of interventions that will help create these initial desired changes.

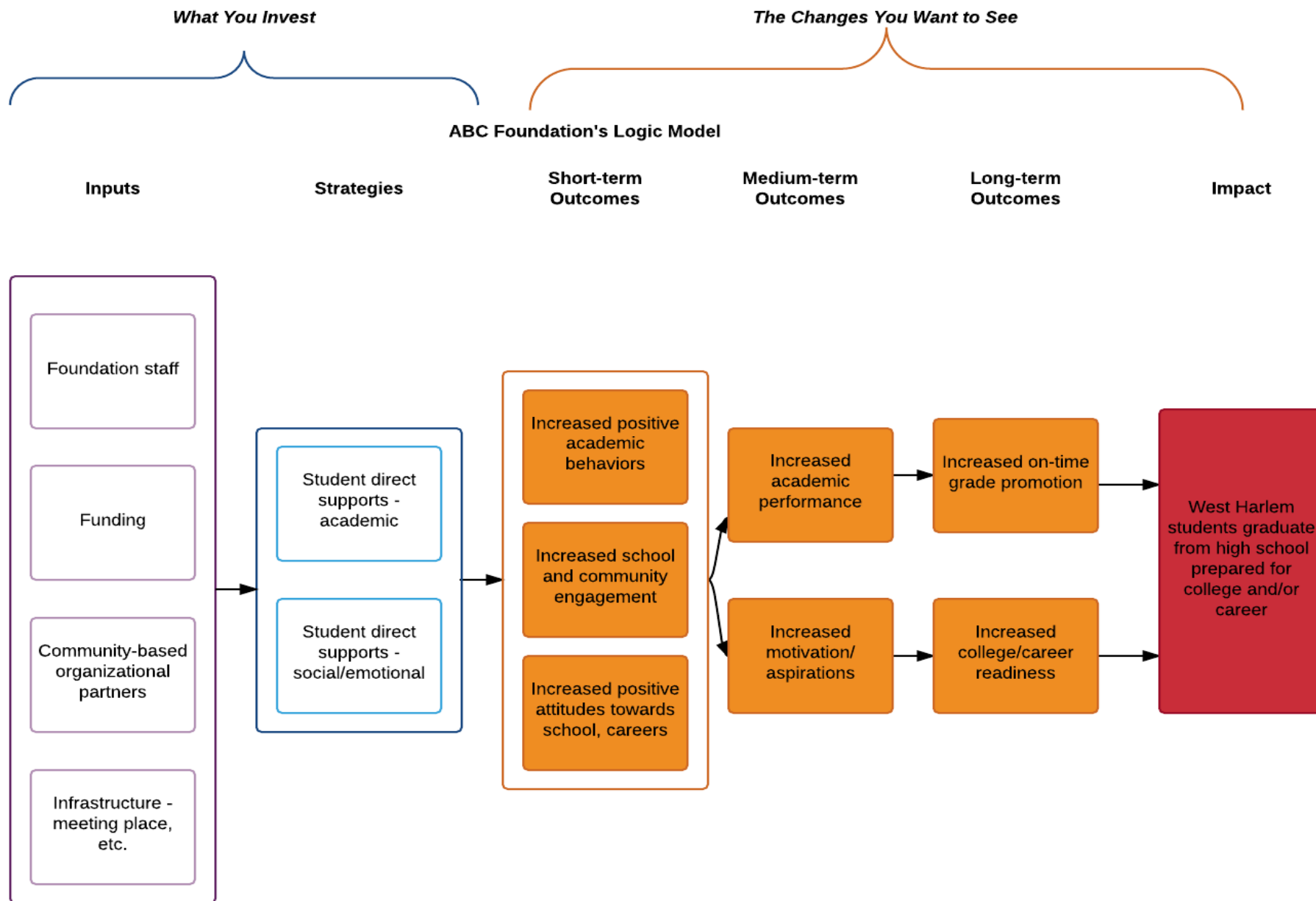


Building Your Logic Model- Program Portfolio Level

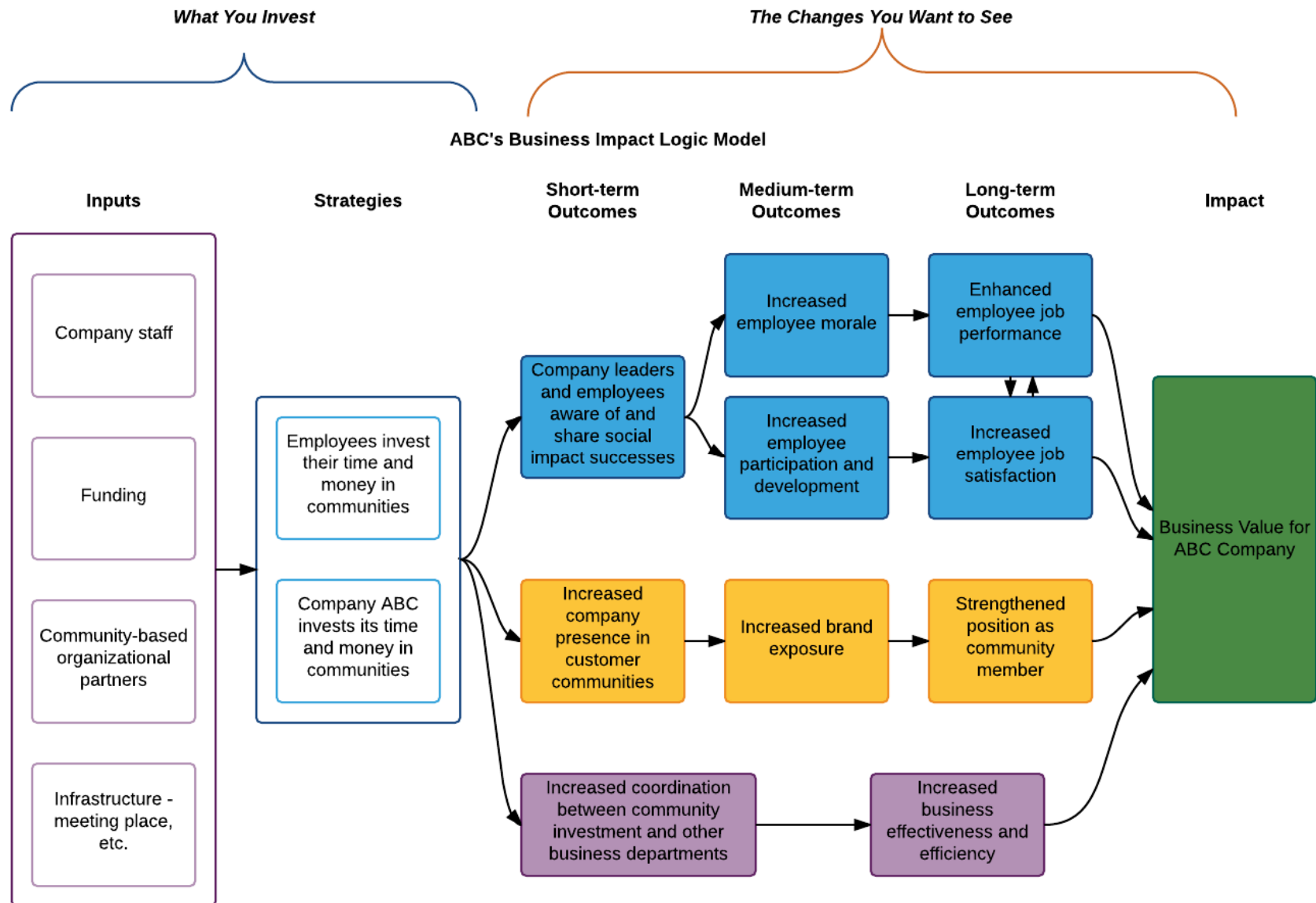
Now add in the investments that you will make to support these interventions.



| Your Completed Logic Model



Business Impact Logic Model Example



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

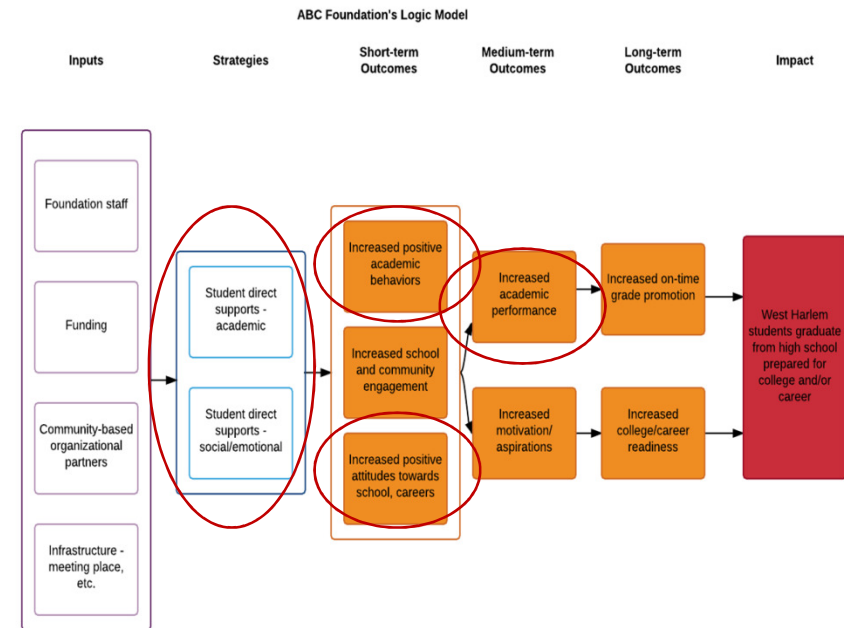
Your wishlist - What is one type
of data that you wish you had?

With which audience would you
share that data?

Prioritizing Your Data Collection

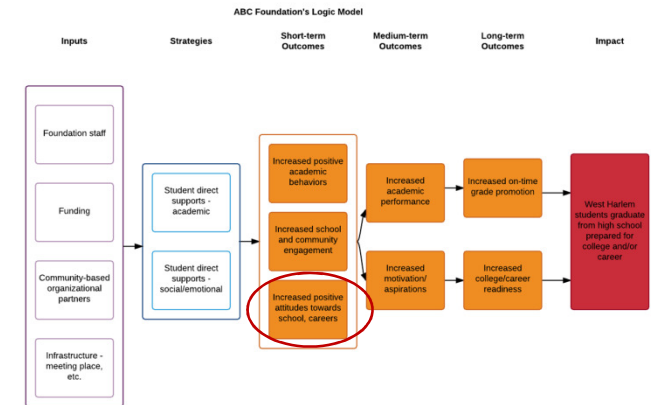
Prioritize sections of the logic model according to:

- 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



Outcome: Increased positive attitudes towards school, careers

- 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

Indicator	Data Source	Timeframe
% of students with increased positive attitudes towards school	Education portfolio grantees	Annually
% of students with increased positive attitudes towards career	Education portfolio grantees	Annually
% of students with prosocial behaviors	Education portfolio grantees	Bi-annually
% of students with leadership skills	“Youth Leaders” initiative grantees	Annually
Students’ experience with “Youth Leaders” initiative	“Youth Leaders” initiative grantees	Annually

V. Connecting to Your Communications Strategy

Unilever – Progress in 2015

IMPROVING HEALTH AND WELL-BEING

FOR MORE THAN 1 BILLION

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

We have helped 482 million people take action to improve their health and well-being.

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.

482 M⁺
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

NUTRITION

We will continually work to improve the taste and nutritional quality of all our products. The majority of our products meet, or are better than, benchmarks based on national nutritional recommendations. Our commitment goes further: by 2020, we will double the proportion of our portfolio that meets the highest nutritional standards, based on globally recognised dietary guidelines. This will help hundreds of millions of people to achieve a healthier diet.

34%[†]
of our portfolio by volume met highest nutritional standards in 2015

- Reduce salt levels
- Saturated fat:
 - Reduce saturated fat
 - Increase essential fatty acids
 - Reduce saturated fat in more products
- Remove trans fat
- Reduce sugar
- Reduce calories:
 - In children's ice cream
 - In more ice cream products
- Provide healthy eating information

REDUCING ENVIRONMENTAL IMPACT BY 1/2

By 2030 our goal is to halve the environmental footprint of the making and use of our products as we grow our business.*

Our greenhouse gas impact has increased and our water and waste impacts per consumer use have reduced since 2010.

GREENHOUSE GASES

Our products' lifecycle: Halve the greenhouse gas (GHG) impact of our products across the lifecycle by 2030.

+6%[†]
our greenhouse gas impact per consumer use has increased by around 6% since 2010*

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

-39%[†]
reduction in CO₂ from energy per tonne of production since 2008

- Become carbon positive in manufacturing:
 - Source all energy renewably
 - Source grid electricity renewably
 - Eliminate coal from energy mix
 - Make surplus energy available to communities
 - New factories
- Reduce GHG from washing clothes:
 - Reformulation
 - Reduce GHG from transport
 - Reduce GHG from refrigeration
 - Reduce energy consumption in our offices
 - Reduce employee travel

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

- Reduce water use in manufacturing process:
 - New factories
- Reduce water use in the laundry process:
 - Products that use less water
 - Reduce water use in agriculture

WASTE

Our products: Halve the waste associated with the disposal of our products by 2020.

-29%[†]
our waste impact per consumer use has reduced by around 29% since 2010*

Our manufacturing: By 2020 total waste sent for disposal will be at or below 2008 levels despite significantly higher volumes.

-97%[†]
reduction in total waste per tonne of production since 2008

- Reduce waste from manufacturing:
 - Zero non-hazardous waste to landfill
 - New factories
 - Reduce packaging
- Recycle packaging:
 - Increase recycling and recovery rates
 - Increase recycled content
 - Tackle sachet waste
 - Eliminate PVC
- Reduce office waste:
 - Recycle, reuse, recover
 - Reduce paper consumption
 - Eliminate paper in processes

ENHANCING LIVELIHOODS FOR MILLIONS

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

We have made good progress across our Enhancing Livelihoods commitments.

FAIRNESS IN THE WORKPLACE

By 2020 we will advance human rights across our operations and extended supply chain.

54%[†]
of procurement spend through suppliers meeting our Responsible Sourcing Policy's mandatory requirements, published in our First Human Rights Report

- Implement UN Guiding Principles on Business and Human Rights
- Source 100% of procurement spend in line with our Responsible Sourcing Policy
- Create framework for fair compensation
- Improve employee health, nutrition and well-being
- Reduce workplace injuries and accidents †

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

INCLUSIVE BUSINESS

By 2020 we will have a positive impact on the lives of 5.5 million people.

2.4 MILLION[†]
smallholder farmers and small-scale retailers enabled to access initiatives aiming to improve agricultural practices or increase sales

- Improve livelihoods of smallholder farmers
- Improve incomes of small-scale retailers
- Increase participation of young entrepreneurs in our value chain

KEY

- Achieved by target date
- On-plan for target date
- Off-plan for target date
- % achieved by target date

† PricewaterhouseCoopers (PwC) assured. For details and the basis of preparation, see www.unilever.com.
* Our environmental targets are expressed on a 'per consumer use' basis. This means a single use, portion or serving of a product.
* In seven water-scarce countries representing around half the world's population.

Unilever Sustainable Living Plan 2015

KEY

- Achieved by target date
- On-plan for target date
- Off-plan for target date
- % achieved by target date

Image Source: https://www.unilever.com/Images/uslp-mobilising-collective-action-summary-of-progress-2015_tcm244-424809_en.pdf

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

- Reduce water use in manufacturing process:
- New factories
- Reduce water use in the laundry process:
- ✓ Products that use less water
 - Reduce water use in agriculture

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

Creating a Reporting Plan

Audience	Report Type	Core Indicators	Timing	Responsible
Board	Dashboard	Investment \$s, # volunteers, Outputs, ST and MT Outcomes	January, July	Alexandra
Executive Leadership Team	Bi-annual progress report	Investment \$s, # volunteers, Outputs, ST and MT Outcomes	June, December	Alexandra
Employees	Internal newsletter	Investment \$s, # volunteers, volunteer stories	January, April, July, October	Entire team
External public and partners	Website stories	Grantee and volunteer stories	January, July	Entire team
External public and partners	Annual report	Dashboard metrics, sample of grantee and volunteer stories	December	Mary with Communications team
CSR Team	Internal Review	All progress indicators, grantee feedback	December	Entire team

Reporting Formats

1



2

"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



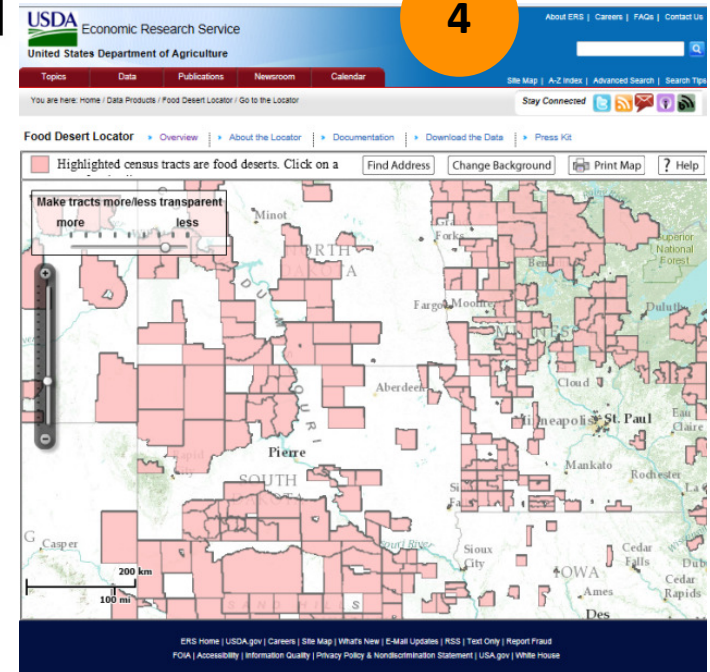
Reporting Formats (continued)

Key Results Statements for ABC Foundation's FY13 Funding Cycle

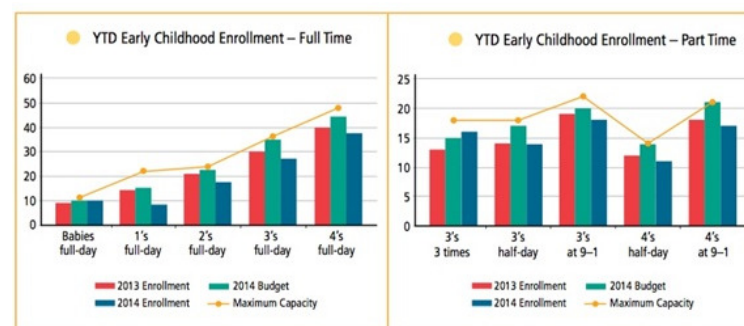
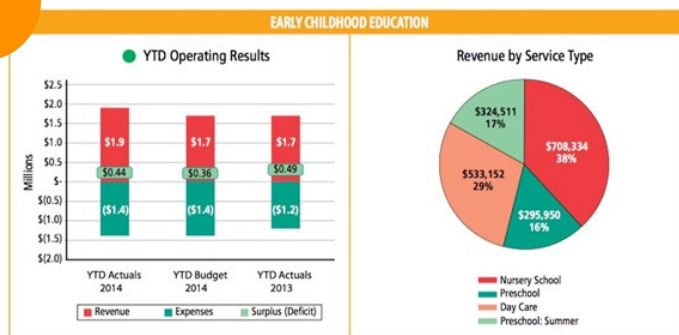
3

- 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.

4



5



VI. Session Worksheets

Clarifying Your Goals

Share your Mission / Vision:



Purpose



Community



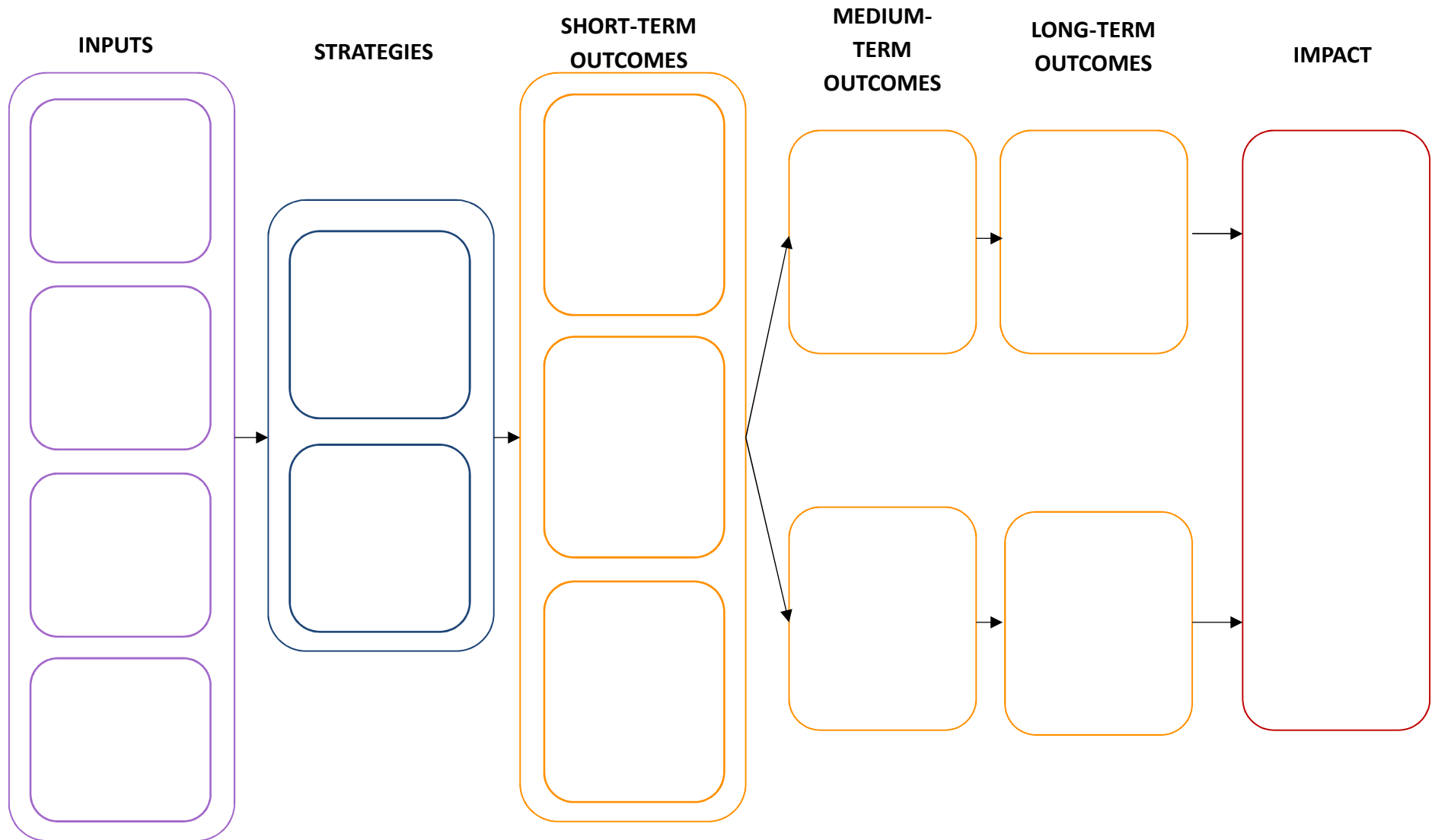
Operations

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.

Building Your Outcomes Framework



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).

Indicator	Data Source	Timeframe
EXAMPLE: % of students with increased positive attitudes towards school	Education portfolio grantees	Annually

Creating a Reporting Plan

Audience	Report Type	Core Indicators	Timing	Responsible
EXAMPLE: CSR Team	Internal Review	All progress indicators, grantee feedback	December	Entire team

A Checklist for Building Your Outcomes Framework

Goal Clarity

- ☐ Goals are driven by our stakeholders.
- ☐ Goals are specific and clear.
- ☐ Goals are measurable.
- ☐ Goals are attainable within our timeline.
- ☐ Goals are relevant to what we need to achieve.
- ☐ Reasonable timeframe on our goals.

Logic Model

- ☐ We've articulated the outcomes needed to reach our end goal.
- ☐ Our logic model shows clear and logical linkages from left to right.
- ☐ We've identified the level of changes we are seeking (individual, organizational, system-level).

Data Prioritization

- ☐ Our core indicators are important data points for understanding if outcomes are being achieved.
- ☐ Our core indicators take into account data needs of our key stakeholders.
- ☐ Our core indicators are feasible to collect data on.

Data Collection Plan

- ☐ We've identified the data sources and timeframes for each of our core indicators.
- ☐ We also allow for program-specific metrics.
- ☐ We have a plan for collecting qualitative data (e.g., quotes, individual stories) where useful.

Reporting Plan & Results Integration

- ☐ We have a reporting plan to help organize what/how/when we will report to our key stakeholders.
- ☐ We have included ourselves as a key stakeholder and have a plan for how we will use the findings in our own decision-making.

THANK YOU

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