CHINESE AMERICAN SCHOLARS ASSOCIATION
E-Leader Singapore
January 4-6, 2016

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SESSION OBJECTIVES

An Overview

1- Social Entrepreneurship

2- Working to Transformative Scale (TS)

- Key Challenges
- Critical Tasks
- Tools

Attendees please Note
Time does not allow us to do more than introduce these subjects.
The last slide describes how attendees can obtain further information on the topics we cover.

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GLOBAL CENTER FOR SOCIAL ENTREPRENEURSHIP NETWORK

VISION: To promote greater peace and prosperity in local community economies and eventually regional, national and international economies by supporting a growing generation of social entrepreneurs.

MISSION: To accelerate social entrepreneurship in higher education through innovative programs and learning technologies featuring a global network of faculty, practitioner-academics, and practicing social entrepreneurs connected by our cloud-based portal and higher education partners.

STRATEGY: To support strong and sustainable social entrepreneurs and the teaching/learning community and impact investor/entrepreneurial philanthropist network that supports them by focusing on the following:

- **Arena:** Provide Social Entrepreneurship courseware, faculty certification training, social entrepreneur certificate courses
- **Vehicle:** Provide contract services to colleges and community colleges as well as regional training seminars, retreats and web services
- **Differentiator:** Teacher and practitioner focused with all activities oriented towards advancing the culture of Social Entrepreneurship: language, skills, values, behaviors, case studies and powerful cloud based data services.
- **Economic Logic:** Licensed fee-based contract services for:
  - Higher and continuing education partners
    2016 Partners: *Marist School of Management (NY); Wheaton College (MA); Babson College (MA*)
  -Foundation and corporate partners
  - Public access regional seminars
  - Community Web services
  - Specialty Programs including Summer Certification and Retreats for those who seek to promote who build sustainable social enterprises for local economies that are focused on “People, Profit and Planet”

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SOCIAL ENTREPRENEURS – A DEFINITION

Social entrepreneurs are individuals with innovative solutions to society's most pressing social problems.

- They are ambitious and persistent, tackling major social issues and offering new ideas for **wide-scale change**.

- Rather than leaving societal needs to the government or business sectors, social entrepreneurs find what is not working and solve the problem by **changing the system**, **spreading the solution**, and **persuading entire societies to move in different directions**." (Emphasis added)

Source: Ashoka: Innovators for the Public
(Largest Network of Social Entrepreneurs)

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SOCIAL ENTREPRENEURSHIP –GLOBAL GROWTH

- ASHOKA is the worlds largest network of Social Entrepreneurs
  - Operates in 70 countries, https://www.ashoka.org/about
    Including: China, India, Indonesia, Japan , Korea, Pakistan, Philippines, Sri Lanka, Thailand

SOME FACTORS LEADING TO GLOBAL GROWTH OF SOCIAL ENTEREPRENEURSHIP

- Public Budgets, in both developed and developing nations are increasingly stressed by:
  - **social challenges** associated with either aging populations; population growth; immigration
  - **environmental challenges** associated with air pollution, climate change, e.g., water shortages, etc.
  - **economic challenges** associated with slow growth and/or the global economy.
- Social Entrepreneurship has demonstrated that it can respond to these challenges with transformative, financially sustainable solutions that combine public, private, and non-profit resources.

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Social Venture Organization

	A-Focus on Outcomes & Impacts Re: Transformative Scale	B- Focus on Practices & Outputs Re: Venture Development
Personnel	Social Entrepreneur(s)	Managers
Key Qualities	Idealism, Vision, Passion	Organized, Detail-Orientated
Focus	**Long Term** Transformative Scale- cultural / system change related to a pressing societal problem	**Short Term** Create venture-scale positive impact related to a pressing societal problem
Planning	Theory of Change	Business Plan
Key Skill Set(s)	Forming or Joining Collaborations Change Agent/Community Organizer	Administration Managing growth of venture
Key Relationships	Allies to expand Impact & Political Influence; Platform Organizations to accelerate Impact	Customers/Clients/Supply Chain Board of Directors/Investors
Metrics	**Operational Focus - Outcomes & Impacts** Impact Reporting & Investment Standards (IRIS)* Social Return on Investment (SROI)* Global Impact Investment Rating System(GIIRS) * *Measuring, financial, and extra financial impact (e.g., Triple Bottom Line (TBLI)	**Operational Focus - Practices & Outputs** Lean Accounting (Orest J. Fiume) * Financials** *Eliminate non-value adding effort (waste) from your value delivery process **Track Cash-Flow, Budget, ROI

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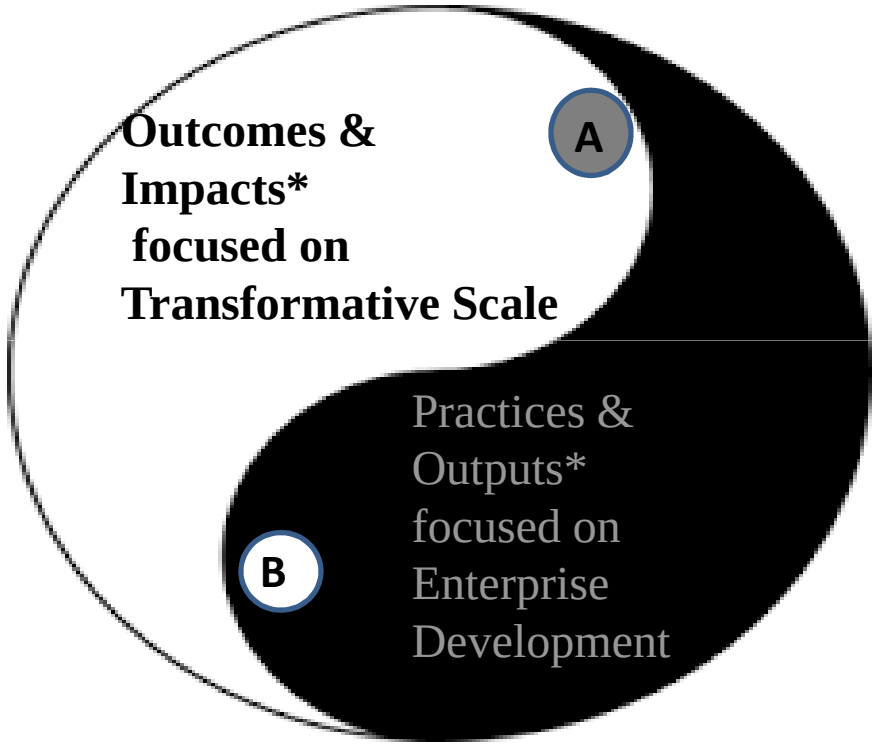
The Yin/Yang of Social Enterprise Organized for Transformative Scale©



* Practices, Outputs, Outcomes, Impact-See Chain of Impact-Slide 18

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TRANSFORMATIVE SCALE-THE CRITICAL CHALLENGE

1. Social Entrepreneurs develop innovative solutions to society's most significant problems

2. Solving or eliminating a significant social problem requires addressing its root cause (s)

3. Addressing the root cause (s) of a significant social problem requires more than incremental change, e.g., change that addresses only part of the problem and/or change that cannot be sustained over time.

For these reasons the Bridge Span Group, a leading thought leader on Social Entrepreneurship, summarized its work (2014) on Social Entrepreneurship as follows:

"Taking "what works" to transformative scale will be the defining challenge of the social sector in the coming decade."

The Bridge Span Group
http://www.bridgespan.org/Home.aspx

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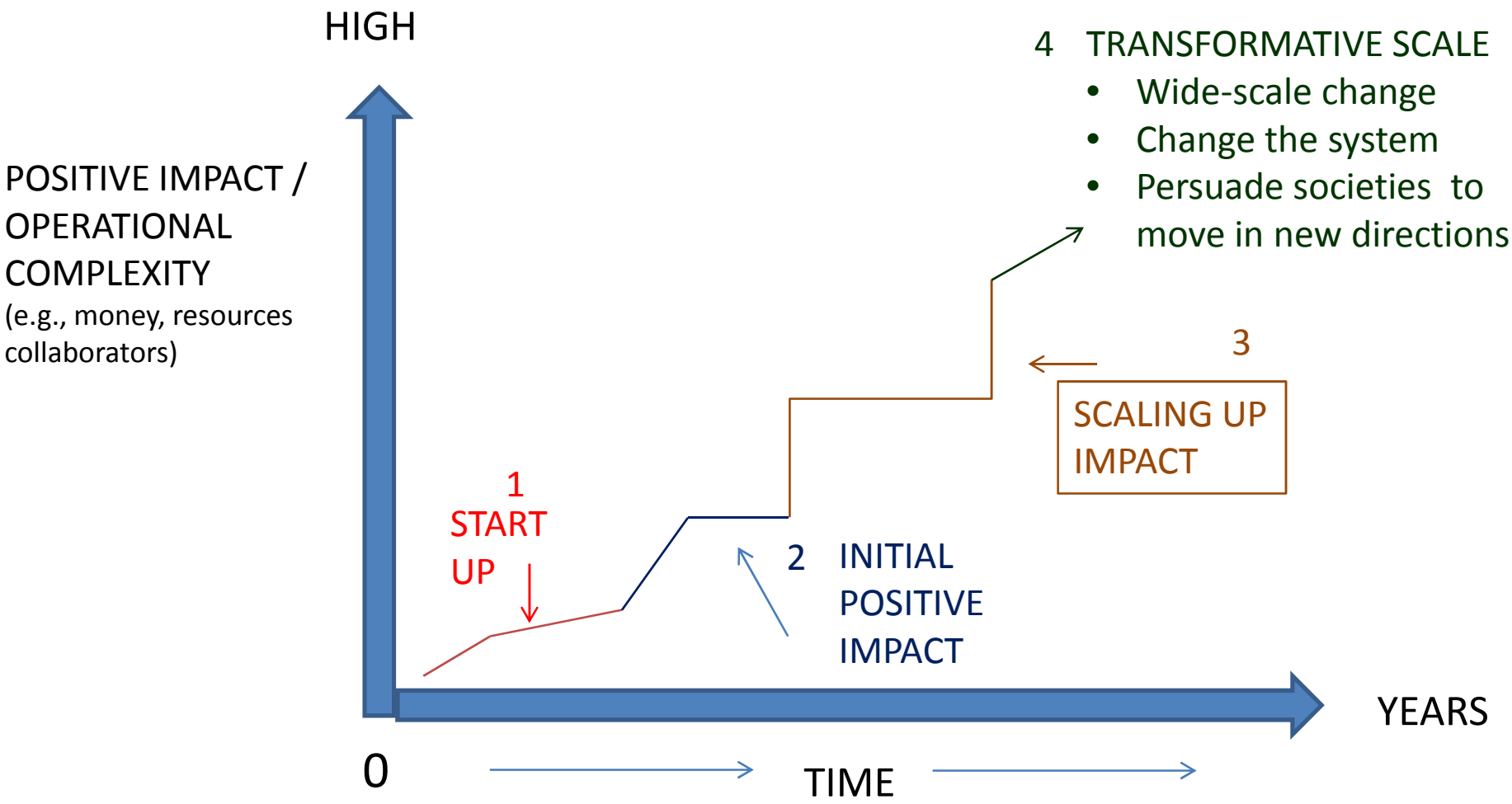
Social Ventures - 4 Stages to Transformative Scale



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SCALING IMPACT to TRANSFORMATIVE SCALE
EXAMPLE

Malaria kills an estimated 1 million+ people per year (UNICEF)

SCALING SOLUTIONS

Stage (2) Solution-**Initial Positive Impact**-Improve t**reatment** of infected persons

Stage (3) Solution- **Scaling Up Impact**-Develop a low cost, vaccine, to **prevent i**nfection

Stage (4) Solution-**Transformative Scale – Eliminate** malaria (Wide-scale/system change)

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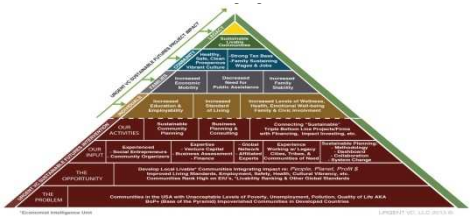
GLOBAL CENTER FOR SOCIAL ENTREPRENEURSHIP NETWORK

"Start-Up Guide" - Organizing a Social Venture for Transformative Scale

Transformative Scale (TS): Livable & Sustainable



6 **Transformative Scale**

Nine Strategies
4 Organizational Pathways
5 Field Building Pathways

7 **Collaboration**

Community / Capital Ecosystem Map
Community of Practice

8 **System Change**

Deliver Impact as part of Change Strategy

9 **Cultural Transformation**

Paradigm Shift

10 **LEGACY**

4- **MEASUREMENT - EVALUATION**

1 **Theory of Change (TOC)**

Problem
Opportunity
Input
Activities
Outcomes
Impact
Legacy
(TS)

2 **Social Venture**

Positive Impact (Goal)
(STAR Framework)
Indicators
Metrics
Business Plan

3 **Monetize Sustainable Solutions**

Triple Bottom Line
- People
- Planet
- Profits

4 **MIS**

Indicators
Metrics
- ✓ Inputs
- ✓ Activities
- ✓ Outputs
- ✓ Outcomes
- ✓ Impacts

5 **Barriers to Sustainability**

- Institutional
- Structures
- Processes
- Cognitive/Social

BARRIERS TO SUSTAINABILITY (aka Transformative Scale)

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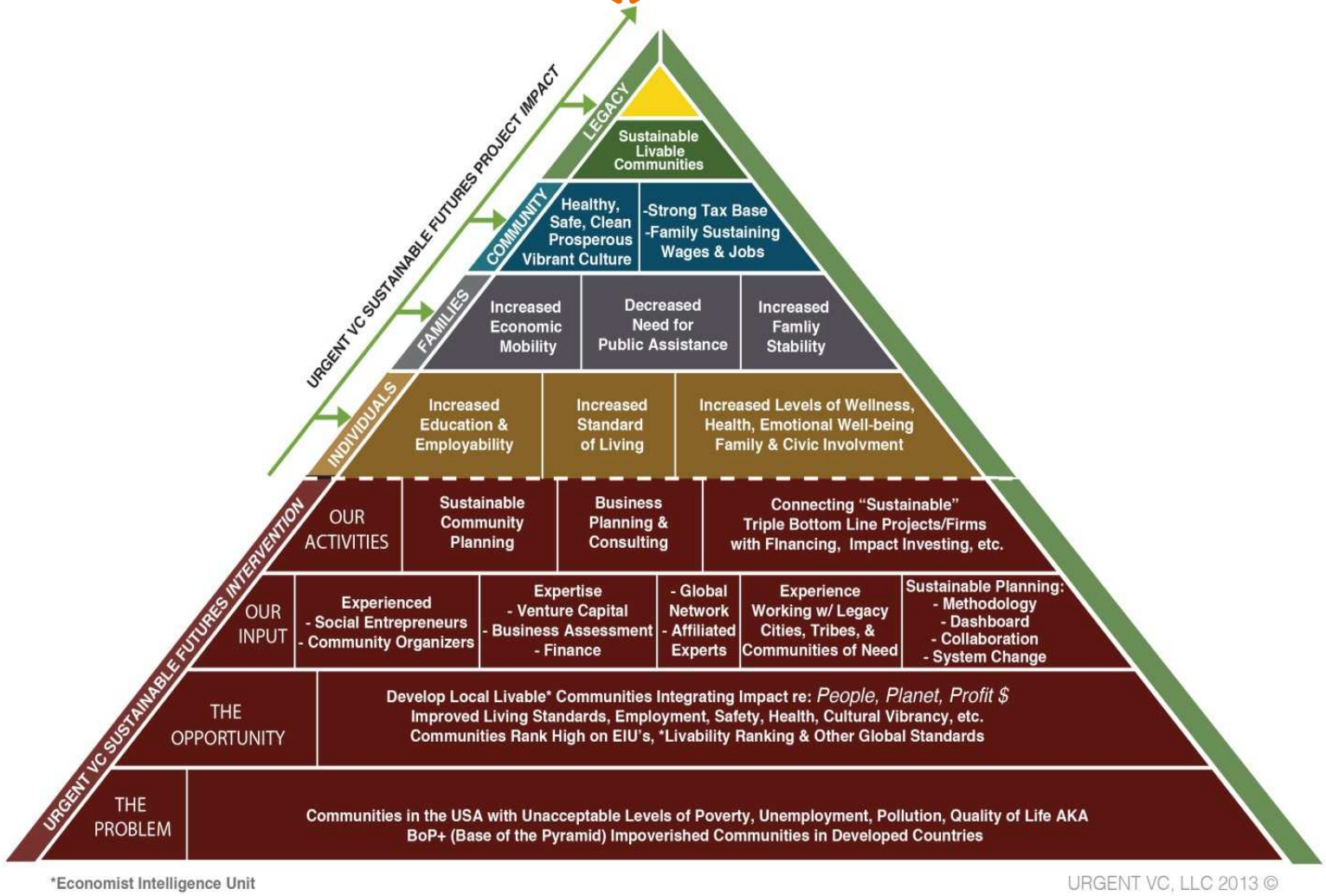
Roadmap from BoP+ to Sustainable Livable Communities

Sustainable Solutions ↔ Sustainable Future



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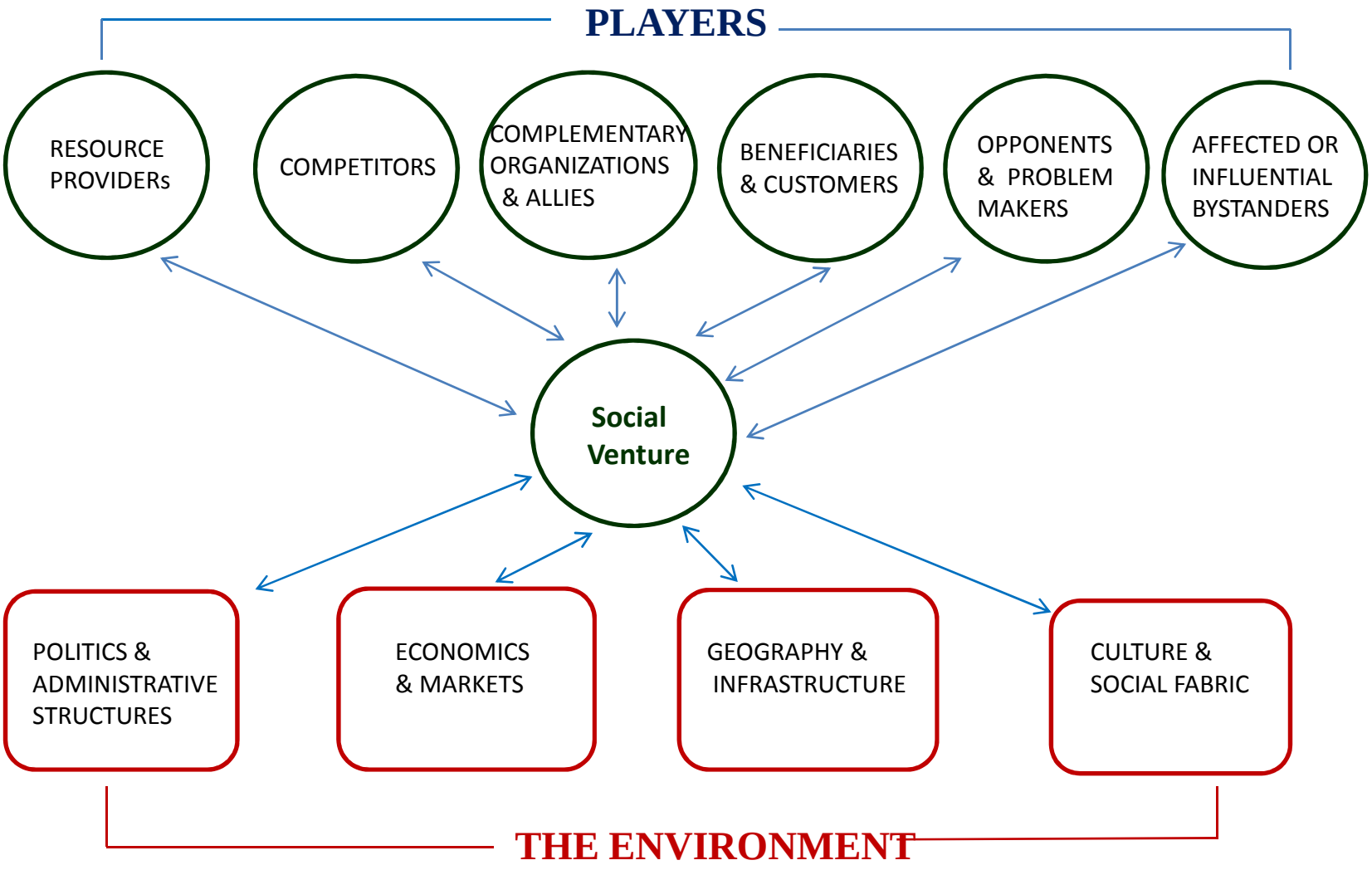
Mapping the Eco-System: Social Entrepreneurs



Source article : http://ssir.org/articles/entry/cultivate_your_ecosystem

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Eco-system Players

RESOURCE PROVIDERS **Providers of financial, human, knowledge, networking, and technological resources**	**BENEFICIARIES AND CUSTOMERS.** Clients, patients, customers, and others who benefit from social entrepreneurs' activities. In some cases, the paying customers might not be the ultimate beneficiary.
COMPETITORS **Organizations that compete with the social entrepreneur's organization for resources and those that compete to serve the same beneficiaries**	**OPPONENTS AND PROBLEM MAKERS**. Contribute to the problems social entrepreneurs are addressing, undermine the ability of the organizations to achieve and sustain their intended impact, or oppose their efforts politically
COMPLEMENTARY ORGANIZATIONS AND ALLIES. **Organizations or individuals that facilitate a social entrepreneur's ability to create impact. This includes partners who perform critical steps in the social entrepreneur's theory of change, individuals and organizations supporting the same cause, and people providing important complementary services.**	**AFFECTED OR INFLUENTIAL BYSTANDERS**. This is a catchall category designed to provoke social entrepreneurs to think about players who have no direct impact now, but who are affected by their efforts or who could influence their success. Of particular importance are organizations that could be harmed if the social entrepreneur succeeds.

Diagram by GCSEN, 2015 **Text : http://ssir.org/articles/entry/cultivate__your_ecosystem**

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ENVIRONMENTAL CONDITIONS OF ECO-SYSTEM

POLITICS &ADMINISTRATIVE STRUCTURES **Includes rules and regulations along with the political dynamics of the jurisdictions in which social entrepreneurs operate. It also includes the processes and procedures affecting these rules, including levels of corruption among politicians and enforcement officials.**	**ECONOMICS & MARKETS** **Includes the overall economic health of the regions in which social entrepreneurs operate and seek resources, as well as the region's distribution of wealth and income, economic prospects, levels of entrepreneurial activity, and relevant markets.**
GEOGRAPHY & INFRASTRUCTURE **Includes not only the physical terrain and location, but also the infrastructure that social entrepreneurs count on for transportation, communication, and other operating needs. What works in dense urban areas may not work nearly as well in sparsely populated rural areas.**	**CULTURE & SOCIAL FABRIC** Covers the norms and values, important subgroups, social networks, and demographic trends of the people living in the area. Though less concrete, these conditions are as important as infrastructure, politics, and economics.

Diagram by GCSEN 2015 Text : http://ssir.org/articles/entry/cultivate_your_ecosystem

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STAR Goals, Objectives - Sustainable Community Development

Core areas that contain evaluation measures and metrics.

Source: ICLEI, National League of Cities

Built Environment	Climate & Energy	Economy & Jobs	Education, Arts & Community	Equity & Empowerment	Health & Safety	Natural Systems
Ambient Noise & Light	Climate Adaptation	Business Retention & Development	Arts & Culture	Civic Engagement	Active Living	Green Infrastructure
Community Water Systems	Greenhouse Gas Mitigation	Green Market Development	Community Cohesion	Civil & Human Rights	Community Health & Health System	Invasive Species
Compact & Complete Communities	Greening the Energy Supply	Local Economy	Educational Opportunity & Attainment	Environmental Justice	Emergency Prevention & Response	Natural Resource Protection
Housing Affordability	Industrial Sector Resource Efficiency	Quality Jobs & Living Wages	Historic Preservation	Equitable Services & Access	Food Access & Nutrition	Outdoor Air Quality
Infill & Redevelopment	Resource Efficient Buildings	Targeted Industry Development	Social & Cultural Diversity	Human Services	Indoor Air Quality	Water in the Environment
Public Spaces	Resource Efficient Public Infrastructure	Workforce Readiness		Poverty Prevention & Alleviation	Natural & Human Hazards	Working Lands
Transportation Choices	Waste Minimization				Safe Communities	

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EXAMPLE OF SELECTING INDICATORS AND METRIICS

A critical part of turning any one category listed in STAR into an action plan requires adding Indicator(s) and Metric(s) customized to your specific project. Example:

TARGETED PROBLEM—Greening the Energy Supply

Sample Indicator—% of community energy from solar

Metrics

- **Sample Baseline score**—current % of KWH from solar =3%

- **Sample Goal**—Increase % of KWH from solar to 7% in 5 years

Your action plan describes your activities to reach the goal.

Developing Indicators and Metrics that accurately capture the impact you are delivering will be critical to developing a Monitoring and Evaluation process that is transparent, objective and timely.

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Mike McCreless is Director of Strategy and Impact at Root Capital.

http://www.forbes.com/sites/skollworldforum/2013/07/15/when-measuring-social-impact-we-need-to-m

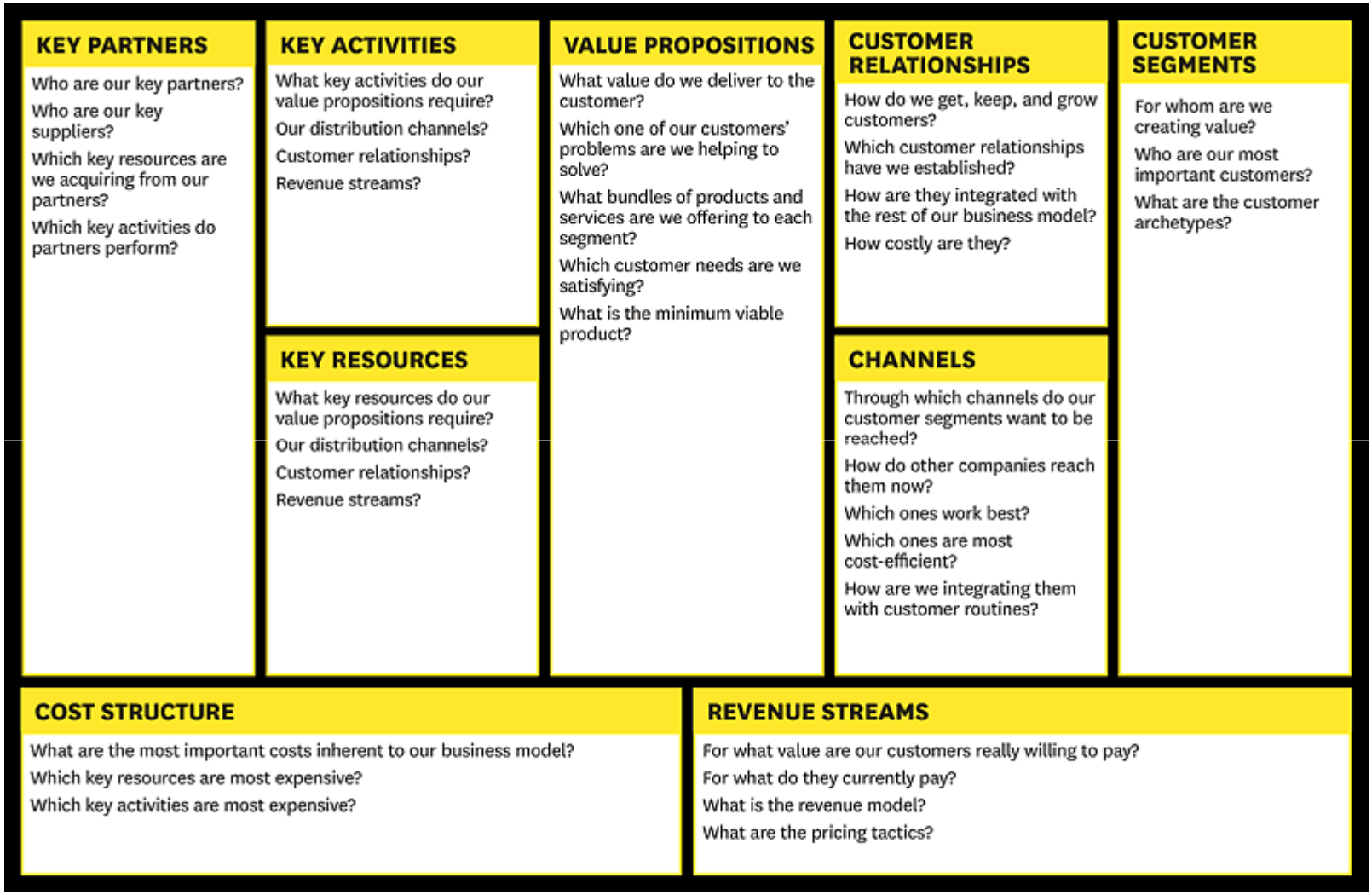
IMPACT VALUE CHAIN

	Input	Activity	Output	Outcome	Impact
Definition[2]	**Resources** that are deployed in service of a certain (set of) activities	**Actions**, or **tasks**, that are performed in support of specific impact objectives	Tangible, immediate **practices, products and services** that result from the activities that are undertaken	**Changes**, or **effects**, on **individuals** or the **environment** that follow from the delivery of products and services	**Changes**, or **effects**, on **society** or the environment that follow from outcomes that have been achieved
Illustrative Example	Investments to an impact organization (e.g., in an micro-finance institution)	Actions by an impact organization to attract clients (e.g., campaigns)	Number of clients served by an impact organization (e.g., loans extended)	Changes among clients (e.g., doubling of household income among MFI clients)	Changes in broader environment of the impact organization (e.g., less crime)
Illustrative Insight for Investors	Capital deployed (I.e., initial investment)	Activities undertaken to deliver on impact goals	Services rendered through impact capital provided	Income generated by beneficiaries due to impact capital	Impact on society due to impact capital

(1) The Impact Value Chain is built on the basic logic model, developed by Carol Weiss and Joseph Wholey
Weiss, C.H. (1972). Evaluation Research. Methods for Assessing Program Effectiveness. Prentice-Hall, Inc., Englewood Cliffs, New Jersey

(2) Definitions are adapted borrowing heavily from both he EU Standard for Social Impact (GECES report) and the European Venture Philanthropy Association's "A Practical Guide to Measuring and Managing Impact" publication

BUSINESS CANVAS MODEL



STANDARD IMAGE

https://www.google.com/search?q=business+canvas+model&authuser=2&biw=1517&bih=647&site=webhp&tbm=isch&tbo=u&source=univ&sa=X&ved=0ahUKEwi7vbS-i_fJAhVHrD4KHRjCDJUQsAQIMQ&dpr=0.9

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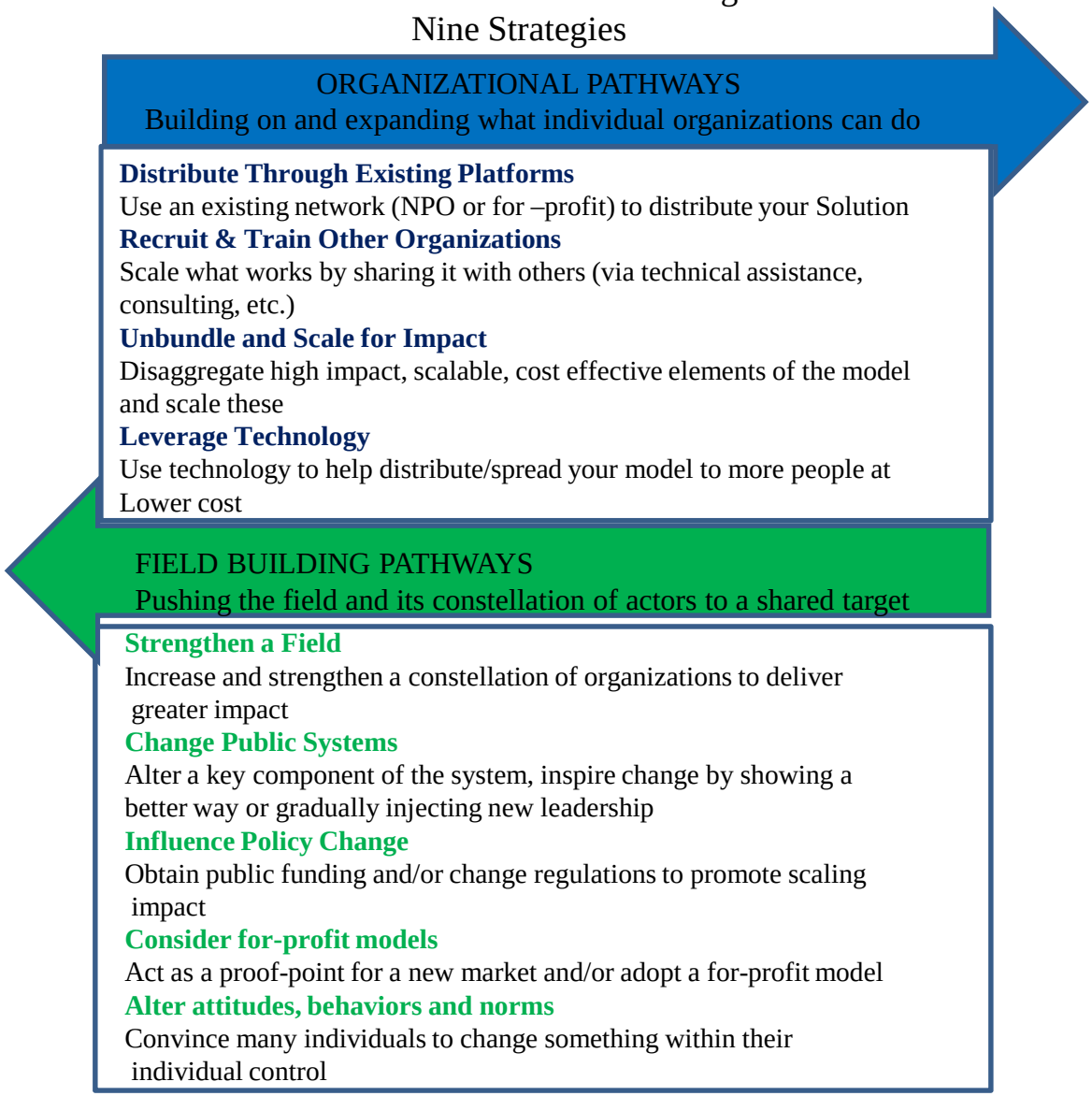
Transformative Scale: The Future of Growing What Works
Nine Strategies



The Bridge Span Group
http://www.bridgespan.org/Home.aspx

SUSTAINABLE COMMUNITY PLANNING
TRANSFORMING CULTURE OF WASTE TO CULTURE OF SUSTAINABILITY

Strategy Map *Figure B*

PROCESS

PLAN**
- Map/Assess
- Analyze
- Action Plan

DO**
- Prioritize
- Act
- Collaborate
- Accountability
- Continuous Improvement

SUSTAIN**
Culture Change via
- Public Support for Reviving municipal Policy/Practices Re: Zoning, Purchasing, Regulations, Etc.
- Individuals Change Lifestyle to Consume and Waste Less

REGIONAL PARTNERSHIP
Multiple Independent Jurisdictions

REGIONAL SUSTAINABILITY STRATEGY
Three Pillars of Sustainability: PEOPLE, PLANET PROFIT$

A1	B1	C1	D1	E1
Renewable Energy & Energy Efficiency	Waste to Energy & Waste Management	Logistics & Transportation	Water, Air, Land Use - Quality - Supply - Concerve/Manage	Quality of Life - Social Equity - Health/Wellness - Culture/Fun

SUSTAINABLE COMMUNITY PROJECTS - Examples

A2	B2	C2	D2	E2
• Cost Sharing - Retrofit Buildings - Purchase Power - Alternate Power	• Cost Sharing - Recycling - Waste Disposal - Waste to Energy	• Rail & Bus • Transit Transects • Bike Paths • Walkability	• Flood Control • Reduce GHG • Preserve Open Space	• Green Jobs • Housing • Quality Schools

GRASS ROOTS/LOCAL SUSTAINABLE INITIATIVES - Examples

A3	B3	C3	D3	E3
• Measure Personal Carbon Footprint • Install Permiable Driveways • Low Impact Development • Zoning/Land Use	• Use GoodGuide to Buy Green Products, e.g., Appliances, etc. • Retrofit Homes • New Energy-Efficient Structures	• Reduce Miles Driven Per Household • Locate Homes Near Public Transit • Buy Local Products	• Energy Efficient Home Improvements • Install Smart Meters/Appliances • Municipal Financing Re: Renewable Energy Retrofits, etc.	• Economic Development • Job Training • Health Care • Festivals • Affordable Housing • Quality Schools

ACTION
- Customized
- Scalable

PARTNERSHIP STAKEHOLDERS

REGION

COMMUNITIES

NEIGHBORHOODS
BUSINESSES
FAMILIES
INDIVIDUALS
- Neighborhood Scale Sustainable Plans
- Public Schools Green Curriculum
- Communities of Practice (CoPs)
- TeamNets

** *Plan, Do, Sustain: The Change Management Pocket Guide* Kate Nelson, Stacy Aaron

URGENT VC, LLC 2013©

CUSTOMIZING SUSTAINABLE SOLUTIONS for SUSTAINABLE FUTURES

GCSEN©* MAP-ANALYZE-ACTION PLAN $ MONETI$E

1

- **Stakeholder Analysis**

✓ Organize Citizen/Civic Participation, Steps 1-7

✓ Develop Public Support for POLITICAL decisions on sustainable policies/budgets

Stakeholder Engagement

Communications Strategy

2

- **Customize Steps 1-7**

✓ Web Site

✓ Project Updates

✓ Performance Dashboard

➢ Goals/Metrics

✓ Public Forum for Sharing ideas

✓ Social Media

✓ Press/TV

Map & Analyze

3

- **Sustainability Audit People-Planet-Profit$**

✓ ID & Prioritize Key Challenges/Needs

✓ Charrettes?

✓ Search Conference?

✓ Utilize local data

Project Plan

4

- **Select Action Categories, & Indicators/Benchmarks People-Planet-Profit$**

✓ Calculate Baseline Score

✓ Gap Analysis

✓ Set goals

✓ Develop Logic Model?

✓ Develop Solutions Tree (s)?

Action Plan

5

- **Elements**

✓ Resources/Budget

✓ Responsibilities

✓ Goals/Indicators/Metrics

➢ Activities

➢ Outputs

➢ Outcomes

➢ Impacts

Implement Action Plan

6

- **Plan Management**
- **Collaboration**

✓ Communities of Practice (CoPs)?

✓ Volunteers

✓ TeamNets ? (Teams + Networks

Evaluate Improve & Moneti$e

7

- **Monitor & Evaluate**

✓ ID Best Practices

✓ Replace Culture of Waste w Sustainability

✓ Performance Dashboard

➢ Goals/Metrics

- **ID MONETIZABLE Sustainable Solutions**

✓ ID Fast ROI

➢ New Revenue

➢ Cost Savings

✓ Impact Investing $$

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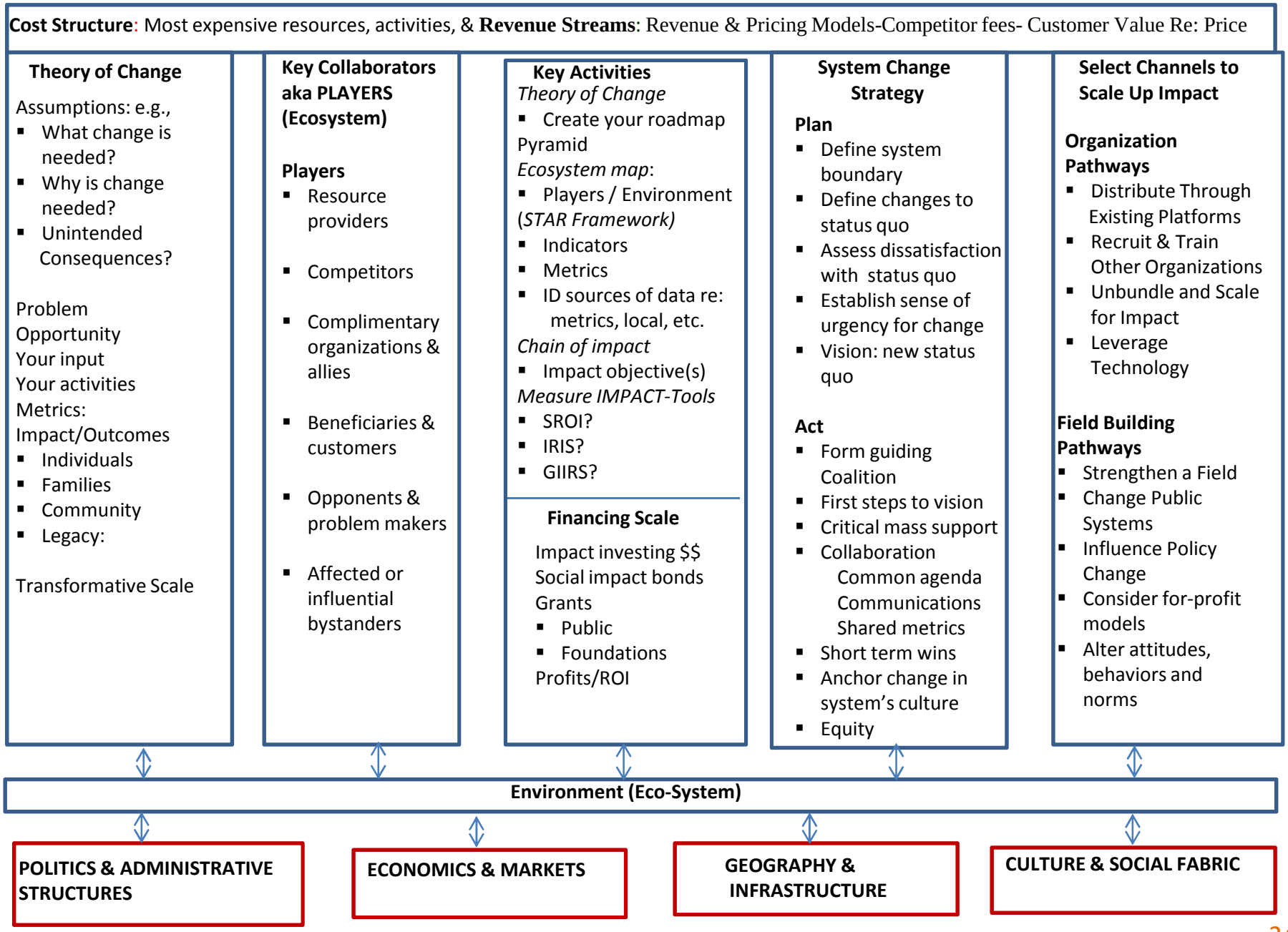
Social Venture: Transformative Scale Template & Examples



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GCSEN RESOURCES-SOCIAL ENTERPRENEURSHIP/TRANSFORMATIVE SCALE

Free downloads at our website after 1/15/16 or contact J Szocik

- SOCIAL ENTREPRENEURSHIP - START UP GUIDE to ORGANIZING TRANSFORMATIVE SCALE©
  (30 Page article accepted by New York University for 12Th annual Conference on Social Entrepreneurship/2015)

- CASA Presentation 2015: Slide Deck and Accompanying Narrative

For information on GCSEN courses contact Michael Caslin III

For additional information on Social Entrepreneurship or Transformative Scale, contact Joseph Szocik

Coming in January 2016- Practical Primer for Social Entrepreneurs on Organizing for transformative Scale
(Templates, Worksheets, Background Material, Bibliography)

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