

## Social Purpose Assessment

This is a tool for companies that have a social purpose to assess and rate the degree to which they have a compelling purpose, and the purpose is embedded in the company and its relationships. The assessment includes 25 practices across the following practice areas:

1. Purpose and Values
2. Governance and Leadership
3. People and Culture
4. Operations
5. Customer Experience and Marketing
6. Business Ecosystem
7. Monitoring and Reporting

To authentically and impactfully deliver on your purpose, it will be ideal to have many of these practices in place across these functions. Not all businesses are expected to demonstrate all these practices, and as such “not applicable” is an appropriate response for those characteristics.

Once you have completed your self-assessment you can identify gaps and opportunities to advance you on your Purpose Path.

Visit the Social Purpose Institute at United Way for a fillable version of this tool. [Link](#).

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Rating System:

1=This is not in place

2: We have just begun to do this

3: We do this reasonably well

4: We do this very well

5: We exceed or excel in this

0=Don't know

NA=Not applicable

## Social Purpose Assessment

Function	Practice	Ranking
Purpose and Values	1. Our purpose is distinctive, motivating, and relevant to our business. It addresses a local or world societal need and concisely communicates why we exist.	
	2. Our values set out the behaviours that guide how we fulfill our purpose.	
	3. We have purpose goals, targets and metrics which are a key component of our corporate strategy. Resource allocation reflects our purpose priorities.	
Governance and Leadership	4. Our board, shareholders and / or owners support our purpose and monitor our progress on it.	
	5. Our company leaders visibly demonstrate support for our purpose, as champions, role models, mentors, and coaches to others on our purpose.	
	6. Purpose guides “go- no-go” decisions, initiatives, products, services, R&D and investment, and provides clarity to our people to guide behaviour on critical issues and in times of ambiguity.	
	7. Purpose is a visible component of our rewards, recognition systems, promotions, and incentives; everyone in our organization has purpose-related objectives in their performance plans, reviews and job descriptions.	
	8. Our purpose is pursued through good and bad times, during all economic cycles.	
People and Culture	9. Purpose is a flourishing aspect of the corporate culture as measured by employee engagement survey and by internal audits that assess alignment of practices with our purpose.	
	10. Our purpose is understood and supported by employees throughout the business. They understand how the purpose of the business connects to the success of the business and their role in it.	
	11. Our purpose is evident across the employee life cycle (e.g., employer brand, recruiting strategies, recruitment interviews, offer letters and orientation through to retirement, legacy planning, and retiree engagement).	
	12. Our employees have the skills, knowledge, and confidence to activate our purpose at work.	
Operations	13. Our office practices and physical premises visibly demonstrate our purpose ethic.	
	14. Our organizational structure reflects and helps deliver on our purpose.	
	15. Our Corporate Social Responsibility, Sustainability and Community Investment strategies link to, reflect, and advance our purpose.	
Customer Experience and Marketing	16. Our purpose is visible to customers at all touch points. They understand it and it’s one of the reasons they choose to do business with us.	
	17. We engage our customers in helping us achieve our purpose.	
	18. We have taken a public stand on our purpose.	

	19. All of our products and services visibly and meaningfully contribute to, and serve, our purpose.	
Business Ecosystem	20. We are collaborating with stakeholders on shared goals related to our purpose (e.g., suppliers, industry peers and competitors, local businesses in our markets, business customers, non-profits, academic institutions, governments, etc.).	
	21. Our suppliers and business partners understand and value our purpose and how we make a difference.	
	22. We engage our suppliers and business partners in helping us achieve our purpose; our purpose is evident in how we work with and reward our partners.	
	23. We promote public policy that aligns with our purpose and encourage others to do as well. We lobby government for broader social or environmental benefit and are not members of organizations whose interests do not align with ours.	
Monitoring and Reporting	24. We have evaluated our success in advancing our purpose and are implementing continuous improvement measures to address gaps and accelerate opportunities.	
	25. We measure and report to our stakeholders on our results and progress towards our purpose.	