

Social Purpose Assessment

The Social Purpose Assessment is a tool for social purpose companies to assess and rate the degree to which they have a compelling purpose, and the purpose is embedded in the company and its relationships.

It is a guideline and set of best practices that enable company benchmarking. It offers guidance on how to become an authentic social purpose company. Completing the assessment will create a heat map of where your company stands. It is tailored to larger organizations, although small companies and start-ups can use the tool to identify practices they can grow into.

The Social Purpose Assessment includes 25 practices across the following practice areas:

1. Purpose, Values and Strategy
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

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Function	Practice	Rating / Notes
Purpose and Values	1. Our purpose is distinctive, motivating, and relevant to our business. It addresses a local or world societal need, going beyond serving customer needs, and concisely communicates why we exist. It has a verb in it, as in “we exist to...”.	
	2. Our values set out the behaviours that guide how we fulfill our purpose. At least one of our values is explicitly connected to our purpose.	
	3. Our corporate strategy includes short- and long-term purpose goals, targets and metrics. 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. Our board has explicit responsibility for purpose oversight in its Charter or Terms of Reference.	
	5. Our company leaders visibly demonstrate support for our purpose, as champions, role models, mentors, and coaches to others on our purpose. The CEO’s role description explicitly stipulates responsibility for purpose execution.	
	6. Purpose guides “go- no-go” decisions, initiatives, products, services, R&D and investments, 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 incentive plans; executives and employees have at least one purpose-related objective in their performance plans, reviews and job descriptions. All executives have at least one explicit purpose metric in their short- and long-term incentive plans.	
People and Culture	8. Our purpose is pursued through good and bad times, during all economic cycles. There is a process in place to escalate issues when social purpose is not integrated.	
	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 organizational structure reflects and helps deliver on our purpose (e.g. title, roles and functions of departments and leaders).	
	14. Our Corporate Social Responsibility, Sustainability, ESG, and Community Investment strategies link to, reflect, and advance our purpose. Our ESG / CSR approach is differentiated from, and not conflated with our purpose (except where the purpose is directed explicitly at sustainability, e.g. Unilever's purpose: we exist to make <i>sustainable living</i> commonplace).	
Customer Experience and Marketing	15. 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.	
	16. We create a variety of engagement opportunities for our customers to help us achieve our purpose.	
	17. Our marketing is consistent with, and helps communicate, our purpose. Our purpose is visible on our website and includes a definition of what it means, and how it creates value for our business, our customers, and society.	
	18. We take public stands on issues that relate to our purpose.	
	19. All of our products and services visibly and meaningfully align with, 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. 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.	
	22. 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.	
	23. We promote the concept of social purpose business to businesses in our ecosystem (including suppliers, business customers and industry and professional associations where we are members) to foster their success, create future collaborators and grow the social purpose business movement; we join with like-minded organizations to amplify social purpose business.	
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, including our purpose goals and targets and performance against them. We disclose our approach to governing and executing our purpose.	



WHAT YOUR SOCIAL PURPOSE SCORE MEANS

0 – 37: Low Social Purpose Score. Your company is just beginning. Having a more clearly defined purpose and a purpose roadmap could help your company on its path to fully implementing its purpose.

38 – 83: Medium Social Purpose Score. Your company is on its way. You are well on your path to implementing your purpose across your organization and into its relationships.

84 – 125: High Social Purpose Score. Congratulations, your company scores very well as a Social Purpose Leader. Consider how you might inspire others including those in your industry.