CAPITAL SYSTEM METHODOLOGY

WHAT IS IT

The Capital System Methodology is a tool that assesses the hidden enabler of a company: the **intellectual capital.**
Intellectual Capital is the set of Strategic Assets that obviously produce value for the company, but from the accountancy point of view, can not be considered in the Financial Statement of the company because are intangible assets.
The intellectual capital is composed of: human capital, relational capital and structural capital.

INTELLECTUAL CAPITAL

HUMAN CAPITAL | RELATIONAL CAPITAL | STRUCTURAL CAPITAL

HOW TO USE IT

For each branch of the graph the startup should give a score (0 - 4) and mark it on the respective lenght. 0 is the minimum, 5 is the maximum.
Joining all the marks you will obtain a figure, which is supposed to be filled in order to highlight an area. This area should give the team the idea of the orientation of the company towards the different sections of the intellectual capital (see the example on the table).

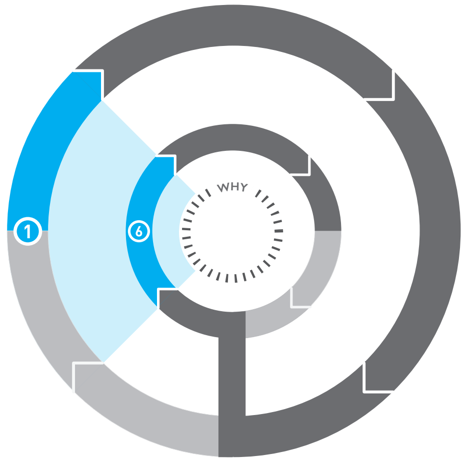
WHY USING IT

The tool helps to visualize and focus on the intellectual resources that the company has access to.
Once obtained the picture of the as-is situation, the company can make a plan on how to develop poorer areas.
The final output reveal a clear vision on that intangible assests that otherwise are not considered as a capital on which address a strategy of growth.

WHEN TO USE IT

WHO

This tool is useful when a team or an enterprises is defining on which resources it can count on, assess the actual situation and decide if there is still something missing which is necessary to achieve the goal.
At this stage it is important to consider also the intellectual capital.



CAPITAL SYSTEM METHODOLOGY

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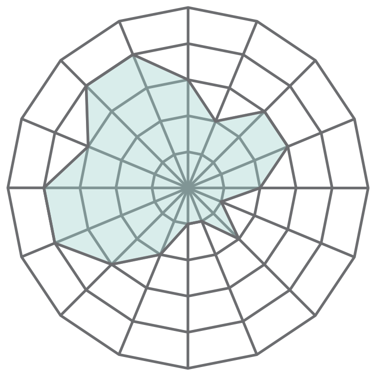
LEGENDA



RELATIONAL CAPITAL

Relation Capital encompasses the collection of relationships that company maintains with its clients, suppliers, social agents, competitors, market regulators, etc.

score

1 basic relationships

↓

4 large network

STRUCTURAL CAPITAL

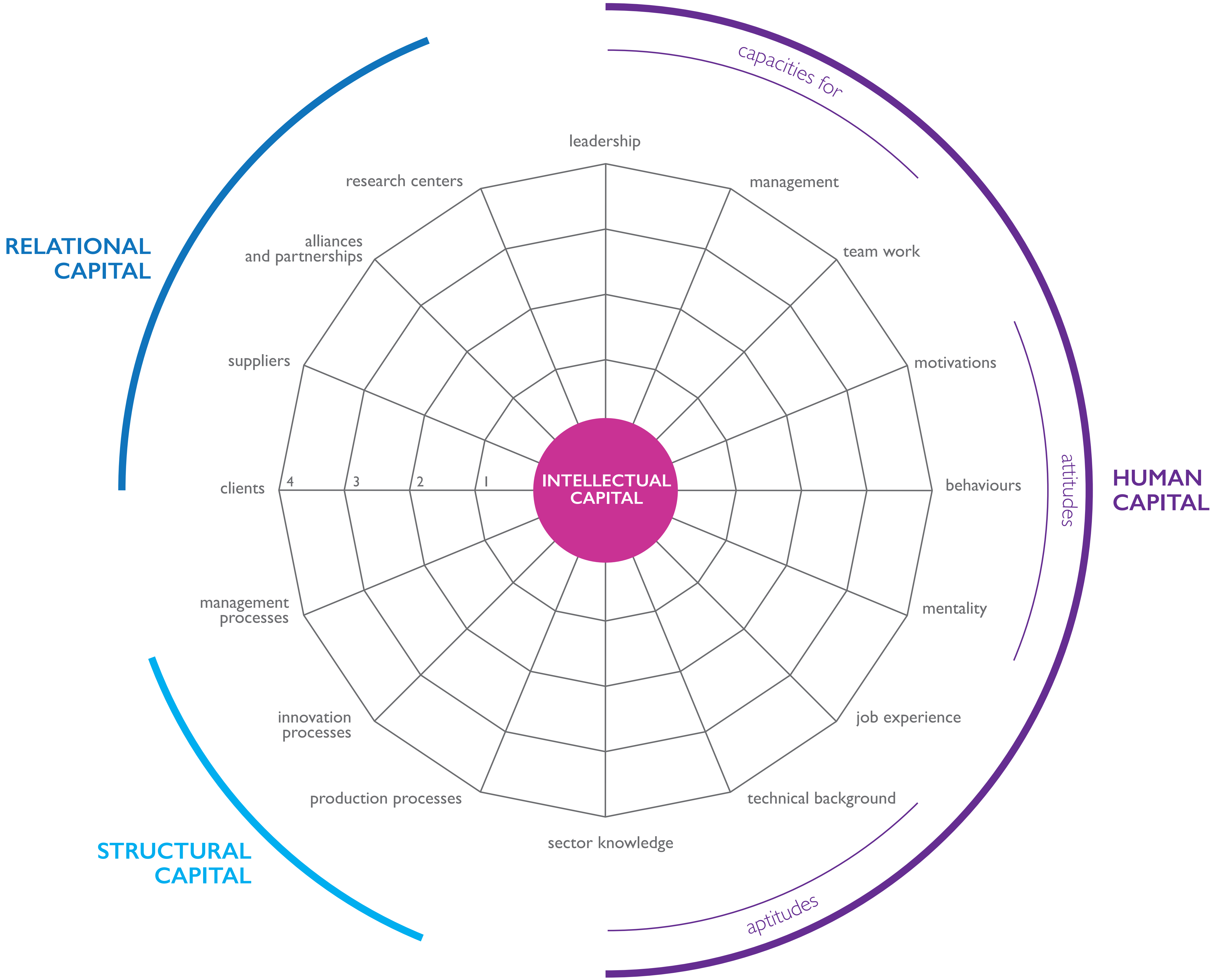
Structural Capital is also called organisational competencies and/or technological. It is the latent knowledge of the company people and teams that is explicit, systematized and interiorized by the organisation, so that, its property is from the company.

score

1 superficial knowledge

↓

4 deep knowledge



HUMAN CAPITAL

capacitiesc for:

leadership > it is about sharing vision and goals, guiding and empowering others

management > involve many skills like communication skills, resolving conflict, measuring results, planning, delegating, negotiating motivating staff, making decisions, managing change

team work > ability to collaborate with others for a common goal

attitudes:

motivations > internal and external factors that stimulate desire and energy in people to be continually interested and committed to a job

behaviours > way in which one acts or conducts oneself, especially towards others

mentality > the ability to think and learn

aptitudes:

job experience > previous knowledge acquired on the field

technical background > technical knowledge of the product and service

sector knowledge > knowledge of business sector and markets

score

1 I'm aware of it

↓ I know how to do it

4 I can teach others

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STAKEHOLDERS MAPS

WHAT IS IT

The Stakeholders Map helps innovators to visualise all the stakeholders involved in the social innovation process. This might include individuals, organisations, communities, companies, institutions, networks and all the actors that contribute to what the social innovation does or that are impacted by it.
It encourages innovators to decide or understand which role stakeholders can take, their level of active participation and their strategical importance within the process. This map is an evolutive tool that follows the growth of a solution and should be updated along the journey.

HOW TO USE IT

The tool encourages you to identify and list all the stakeholders affected by your project and then to place them on the map accordingly to their role.
Firstly, divide the actors into two main groups:

- stakeholders actively involved, those without whom your solution can not work;
- stakeholders impacted, who only benefit or not from what you do.

Within the inner circles (involved stakeholders) you can distinguish those who are strategic for you from those who are technical providers.
Then consider the level of their participation in the service: going from the outside to the center, the level of interaction with the service increases. From informative or consultative roles, users can be integrated into the design, production and delivery of the solution, getting to the core of it and assuming roles of management and governance.

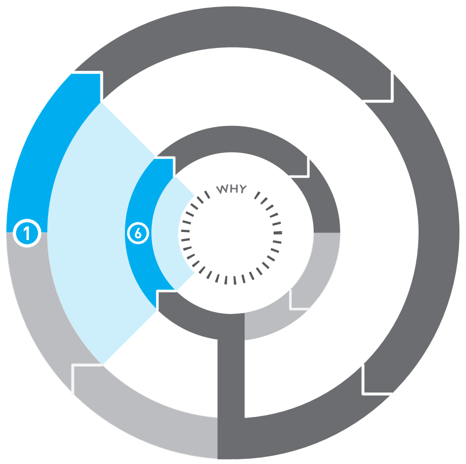
WHY USING IT

The Stakeholders Map encourages social innovators to create a clear and visual picture of the overall system of actors. It is extremely helpful in understanding which stakeholders are currently involved in a project and how, which connections are crucial and why, and which relationships can be reinforced. It helps innovators to analyse the different roles and the levels of participation, fostering an inclusive approach in defining the features of a solutions.
This tool can be also used in a generative way, by discovering fruitful connection with unexpected stakeholders, i.e. actors that usually play a minor role or that are key player in different sectors.

WHEN TO USE IT

WHO

This tool could be used both at early and later stage when dealing with stakeholders' engagement: at the PEOPLE stage in order to identify the main stakeholders; in the TEAM stage with the aim of refining and developing the solution and strenghtening a larger network.



STAKEHOLDERS MAP

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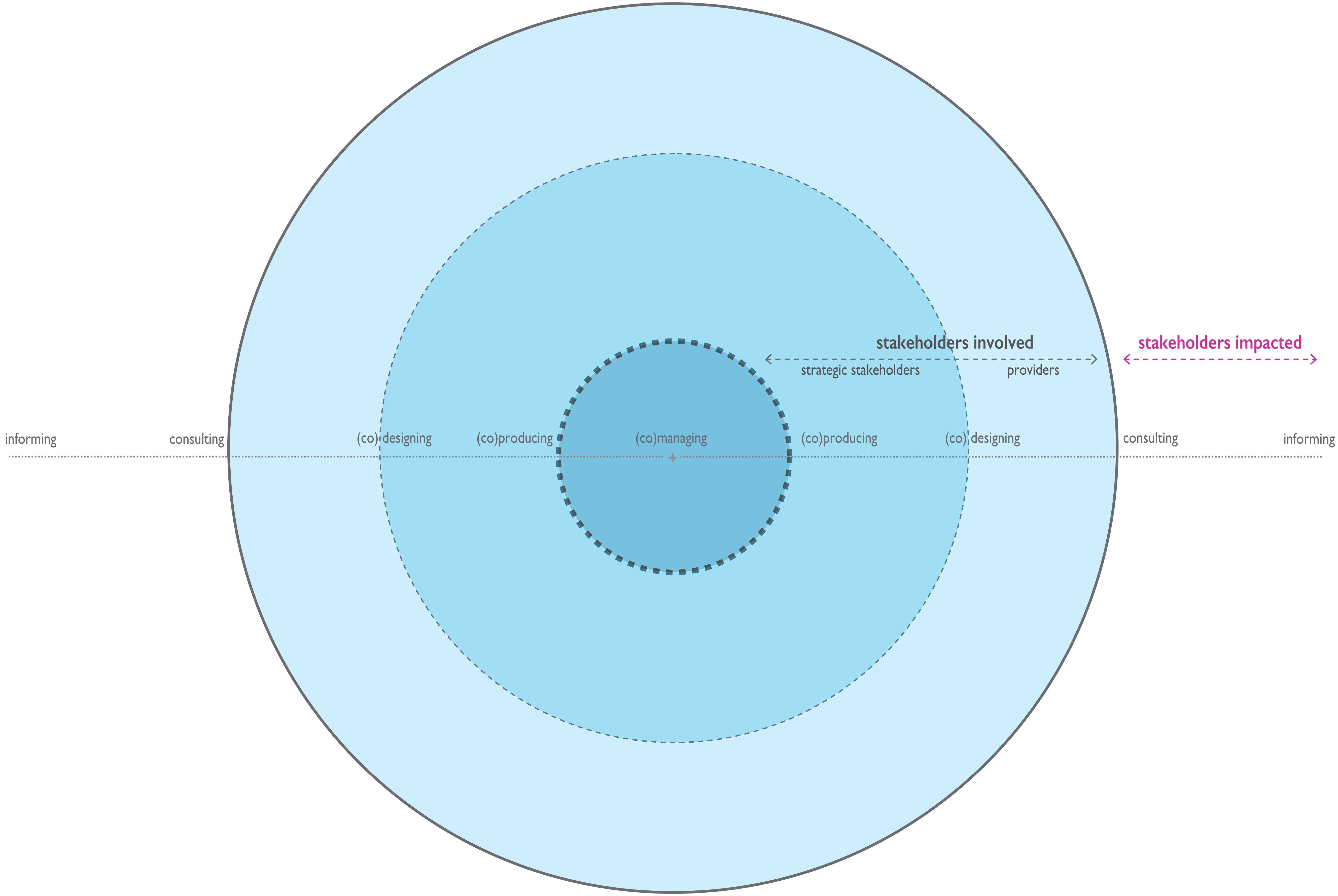

STAKEHOLDERS MAP

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CO-DESIGN PLAN

WHAT IS IT

The Co-design Plan helps innovators to define the participatory activities with the stakeholders along the journey of scaling their social innovation solution. This tool is a guide to plan a successful co-design session. It allows you to select from a variety of tools and from different degrees of stakeholders' involvement.
It contributes to define and make perceivable the meaning of the solution for the users and for the wider network of the stakeholders, keeping the focus on the innovativeness of the behaviour it proposes and making it more desirable and aspirational.

HOW TO USE IT

The Co-design Plan is organized in 5 phases according to the degree of interactivity between the innovators and the users. Moving from left to right, the tools and methods need an increasing involvement and effort.
Use the Co-design Plan accordingly to this sequence:
1. Identify what is the subject of your co-design: what do you want to understand? what needs to be better clarified?
2. Evaluate available time and resources of both yourself and the users.
3. Select one tool from the ones listed above each phase.
4. Plan the co-design session by answering to the questions:
   - how? - agenda, material and resources;
   - with whom? - users and communities engagement;
   - where & when? - location, atmosphere, logistics, time, duration, iteration.

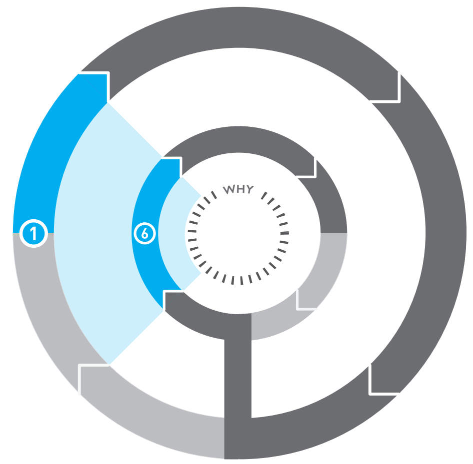
WHY USING IT

Social innovations are solutions delivered by organisations that must deal with a multi-stakeholder process in order to develop and scale. They continuously interact with users, clients, communities, companies, institutions and other actors. This process requires dedicated sessions of co-design, enabling innovators to shape adaptive solutions, open to external inputs and feedbacks.
The implementation of co-design sessions contributes to:
- foster inclusiveness by engaging stakeholders in an interactive process;
- encourage the innovation capacity of the communities to emerge;
- support and strengthen over time the motivations of the relevant stakeholders to collaborate;
- creating extended and varied networks to encourage replicability.

WHEN TO USE IT

WHO

This tool could be used both at early and later stage when dealing with stakeholders' engagement: at the PEOPLE stage in order to better define the idea and indentigfy the main stakeholders; in the TEAM stage with the aim of refining and developing the solution and strenghtening a larger network of co-designers.



CO-DESIGN PLAN

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Tools	Stage	What do I want to understand?	HOW	WITH WHOM	WHERE & WHEN
Design probes Culural probes Empthy probes Diaries Fotoreportages	ASK FOR AUTO-REPORTAGES	What do I want to understand?			
Surveys Questionnaires Interviews Empathic conversation Focus group	ASK FOR OPINIONS, INFO AND FEEDBACKS	What do I want to understand?			
Conceptual Maps Stakeholders map Storyboards 3d/2d Mockups	SIMULATE INTERACTIONS	What do I want to understand?			
Personas Personifications Role plays Recitations	SIMULATE ROLES	What do I want to understand?			
Cards Brainstorming Scenarios Videoscenarios	CREATE AND DEVELOP ALTERNATIVES	What do I want to understand?			

Degree of interactivity of both the tools and the participation of the designer →

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THINKING OUT OF THE COMFORT ZONE

WHAT IS IT

This tool is a group action methodology where structured conversation and dialogue interconnect and frame individual and group capacities in order to make new solutions emerge.

HOW TO USE IT

"Thinking Out of the Comfort Zone" guides a team or a group of peers through a process in which a case giver presents a case, and a group of 3-4 peers or team members helps as consultants.
After having selected a timekeeper, a case giver and the coaches (consultants), the case giver can start sharing his personal aspiration and leadership challenge that is current, concrete and important. Then the meeting can follow the process described on the table.
During all the process the coaches have to listen deeply, without trying to "fix" the problem, while also attending to the images, metaphors, feelings and gestures that the story evokes in them.

WHY USING IT

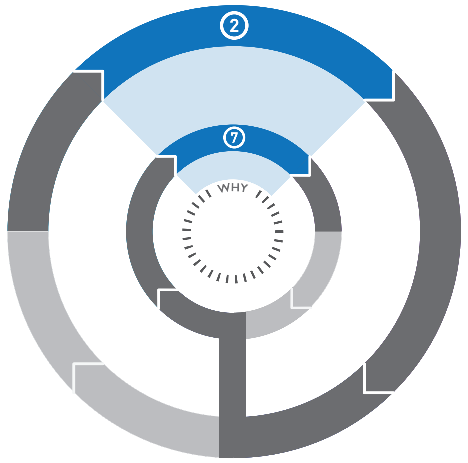
It can be used in order to:

- Reframe the possibilities through the meeting with different stakeholders.
- Orientate a group to future solutions by clarifying their intention and impact they want to achieve.
- Generate new ways to look at a challenge or question.
- Develop new approaches for responding to the challenge or question.

WHEN TO USE IT

WHAT

This tool is useful in thE early stage when the team is focused raising awarness on a topic.
At the same time it enables to access the wisdom and experience of peers and to help a peer respond to an important and immediate leadership challenge in a better and more innovative way.



*This tool is inspired by Theory U by Otto Scharmer

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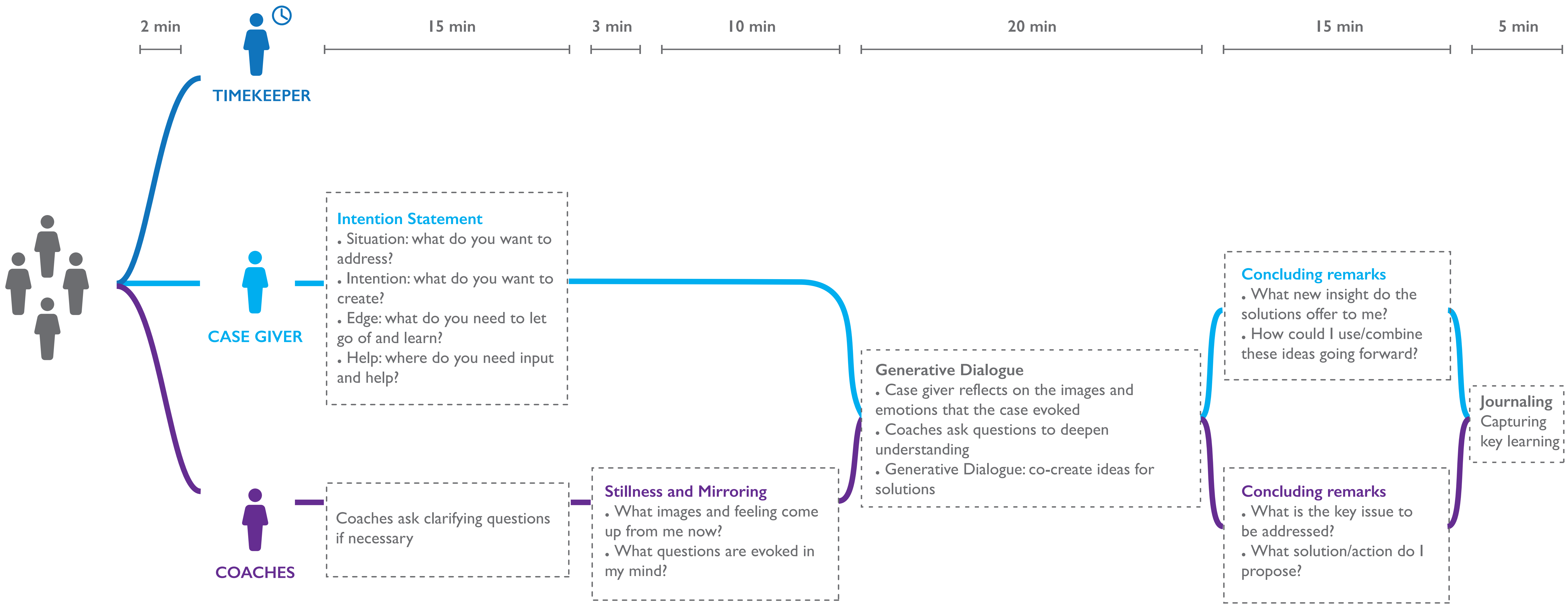

SIP Social Innovation Park

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STORYBOARD AND TOUCHPOINTS

WHAT IS IT

The Storyboard and Touchpoints tool support the social innovator in designing the solution from the point of view of the main user; moreover it allows him/her to identify the touchpoints that enable a consistent, effective and pleasant experience of the service.
The Storyboard derives from the cinematographic disciplines; it is the representation of the user experience in a narrative sequence through a series of drawings or pictures and captions.
Touchpoints identify the contacts between those who use and who provides the service, involving a specific human need in a specific time and place. The service becomes tangible through evidences - the touchpoints - that enable interaction with the service itself.

WHY USING IT

This tool has a crucial importance in designing the solution. It encourages social innovators to step into the shoes of the main users and to adopt their point of view in experiencing the service. It is particularly useful to make clear the atmosphere, the experience and the context of use and to find potential problems before they occur. By visualizing the scenes, it foster the creative process allowing a group of people to generate ideas and evaluate alternatives.
The use of key-frames and captions – as if it were a movie – helps to select the main stages of the service and to understand the related main needs expressed by the user. A clear and precise sequence of needs is the basis for the design of a consistent and effective series of touchpoints or to optimize the existing ones.

HOW TO USE IT

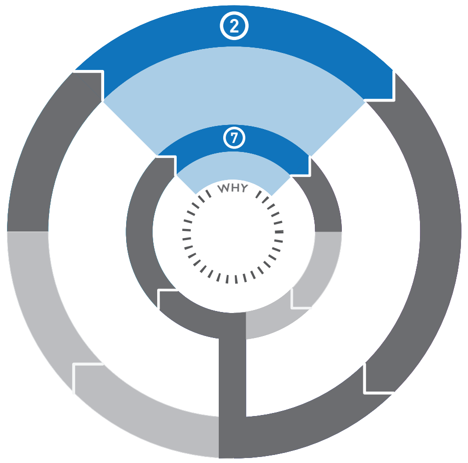
Firstly, identify the main user of the social innovation and the 6 main actions that describe the user experience. Draw the 6 scenes as they were key- frames of a movie. Write a caption for each of them. The protagonist is the main user, who is the main subject of both drawings and captions.
For each action, understand which is the main need expressed by the user.
Once that the needs are clear, select or design the touchpoint that better fulfill the needs and list them.

E.g.: the car sharing service.
Need: sign up - Touchpoint: the car sharing shop and the member-card
Need: reserving a car - Touchpoint: a mobile app
Need: begin rental - Touchpoint: member-card that works as a key

WHEN TO USE IT

WHAT

This tool can be used by both early- and late-stage innovation in order to design a solution, keeping the focus on the main users.



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USER STORYBOARD

Draw the key-frames from the point of view of the main user of the service

Write a narrative to explain the drawings. The protagonist is the main user.

NEEDS

For each key-frame identify the main need expressed by the user.

TOUCHPOINTS

Select or design the touchpoints according to the related need.

STORYBOARD AND TOUCHPOINTS

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SOCIAL BUSINESS MODEL CANVAS

WHAT IS IT

The *"Social Business Model Canvas"* is a tool for creating a solid business model around your social enterprise. It's also a collaborative tool that helps you communicate different business models with your stakeholders and brainstorm new ones.
The Social Business Model Canvas supports social ventures, enabling them to tell a compelling story about their social impact, the market it operates in, their financial performance and their implementation plan.

HOW TO USE IT

The *"SBMC"* is a simple one pager that summarize long business plans.
The model itself has some useful annotations in each section that can help you to fill the blanks.
It is supposed to be a live document. This means that you fill it out based on what you know today with the understanding that you will be revising it as you learn more from testing your hypothesis.
Some suggestions:

- be specific
- take everything as an hypothesis to test
- create multiple canvases to choose amongst
- be quick on your feet: fill those blanks quickly
- regularly consult and update your *"SBMC"*

WHY USING IT

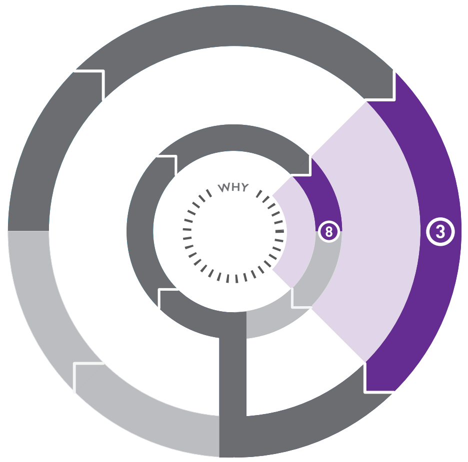
Use the *"Social Business Model Canvas"* in order to:

- Clearly identify who your beneficiary segments are -- even if they aren't paying you and there is no place for them in the regular business model canvas.
- Ensure that you have laid out a compelling rationale that will drive your customers to buy without forgetting about your impact on society.
- Develop clear thinking around what kind of social impact you're creating and how it could be measured.
- Plan and communicate what happens with profits and where you aim to reinvest them.

WHEN TO USE IT

HOW - VIABILITY

Early stage ventures can often find themselves floundering when it comes to articulating their business proposition.
Social ventures frequently have even greater difficulty as they struggle to communicate the social value proposition at the heart of their business.



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IMPLEMENTATION

PARTNERS

Who helps you to deliver your activities?

DELIVERY

What activities do you do?
What resources do you own?

SALES & MARKETING

What is your sales and marketing plan?
How do you reach your customers?

SOCIAL VALUE PROPOSITION

What differences are you making?
What social impact measures do you use?

MARKET

CUSTOMER SEGMENTS

How do you work with people who buy your product/service?
Who are the people that benefit?

MACRO ECONOMIC ENVIRONMENT

What are the economic, social and technological changes taking place that affect your market now and in the future?

COMPETITORS

Who else plays in your space?
Why are you different?

FINANCE

COST OF DELIVERY

SURPLUS

Where do you intend to reinvest this?

REVENUE

* Created by The Young Foundation. Inspired by The Business Model Canvas (www.businessmodelgeneration.com)

SOCIAL BUSINESS MODEL CANVAS

THE YOUNG FOUNDATION
THINKING ACTION CHANGE

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ONE PAGER / BP SUMMARY

WHAT IS IT

The Business Plan is a key document in scaling a project both in terms of giving thought as to how the business will grow, develop and scale as well as a tool to attract investment. It should be 30 pages max including financials, other information can be added as appendices.
While the Business Plan is a detailed document it is unusual that an investor will read a full Business Plan at the outset. Therefore, usually, a one page summary of the key points in the Business Plan needs to be produced, and this is what is distributed to potential investors/angels.

An example can be found at www.enterprise-ireland.com

HOW TO USE IT

While filling the Business Plan Summary, some key points are:

- **Demonstrate** any sales to date or if sales have not yet been achieved then note any good results from beta testing, testimonials, POs, etc. – this demonstrates a market ready product and investors take an interest in this!
- As a small company, investors are concerned at how promoters will make an impact on a global stage. Therefore, significant **engagements** with any potential distributors/partners/licensees/etc. (and how this will open markets for the entrepreneur) are important.
- **How much money** is required and how will it be spent? Is it on development costs, market development, key person hires, etc. It is important for investors that there is no 'black hole' in terms of unexpected/hidden development costs.
- Finances should cover **4/5 years**.

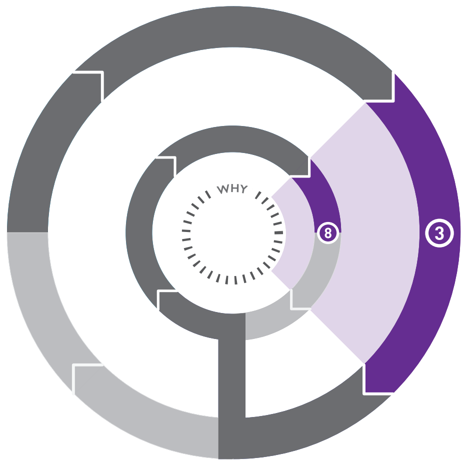
WHY USING IT

The Business Plan is required so as to construct a project proposal which is investor ready. Subsequently, a one page summary of the plan can be distributed to potential investors/angels.
The mai aim is to attract investors and plan a credible plan of expected cashflows.
Companies passing the initial screening and Business Plan development phase may receive some coaching from the angel representative organisations regarding the expectations of investors and how to better present the company via the one page summary.

WHEN TO USE IT

HOW - VIABILITY

When the idea is defined and the team is ready the most crucial stage for a startup is when it has to find fundings. It is important at this stage to prepare a business plan which is as much detailed and actual as possible in order to engage investors. This tool is usually used in stage 8, with strucutred projects.



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how to

INVESTMENT PROPOSAL

Requirement:
Insert here a brief statement of the investment amount needed and the main destination area of the investment.

What the company does?
Explain the core business of the company.

Present Position:
Display the current status of the company: what is already doing and which are the plans for the future.

Distribution and diffusion:
Explain briefly the plan of distribution/diffusion of the main proposition of the company. Include also partners you are going to engage, channels you are going to use and the main competitors.

The Opportunity:
Depict here the gap or the fertile ground in the market/society that you are going to tackle and the need which is currently unmet and why.

Financial Summary
Summarize here in a table the main forecasted cashflows of the first 4-5 years of life of the company. Consider: total revenue, gross margin %, net profit, net profit margin, employees.

Ref: Insert a reference number, if you have it.

Stage of Dev: Status of the company (ex. *start-up*).

Investment required: Total amount required for funding.

Sector: Sector where the company is operating.

Skills sought: Skills needed to achieve the goal.

Revenues: Revenues forecasted for next 4-5 years

Document created: Date of creation of the doc.

Management & Shareholding:
List here the main shareholders of the company and management board members together with their accountabilities.

Company: Name of the company

do your own

INVESTMENT PROPOSAL

Requirement:
_ _
_ _
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_ _

What the company does?
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_ _
_ _

Present Position:
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Distribution and diffusion:
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The Opportunity:
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Financial Summary
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Ref: _ _ _ _ _ _ _ _ _ _ _ _ _ _

Stage of Dev: _ _ _ _ _ _ _ _
_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

Investment required:
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Sector: _ _ _ _ _ _ _ _ _ _ _ _
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Skills sought: _ _ _ _ _ _ _ _
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Revenues: _ _ _ _ _ _ _ _
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Document created:
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Management & Shareholding:
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Company: _

ONE PAGER / BP SUMMARY

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PITCH DECK

WHAT IS IT

The moment of the pitch is the key stage when to communicate and engage stakeholders with your idea or company.
If the business plan and one page summary has been successful in terms of attracting the attention of investors the promoter will be invited to meet potential investors individually or in a group session.
This tool is a guide that supports the making of the pitch for a social enterprise.
The pitch highlights key elements which are necessary to explain the core business of the company and is a way to define its structure, to clarify the goals and to plan how to achieve them.

HOW TO USE IT

Follow the path designed in order to develop the presentation for the pitch.
It is not necessary to keep exactly the same format, the important thing is to cover all the elements.
The path works as a structure for a PPT which can be used when pitching to individual angels/investors or groups. There should be 10 to 12 slides maximum addressing the outlined areas. Usually you only have 10 minutes to present followed by 10 minutes Q&A.

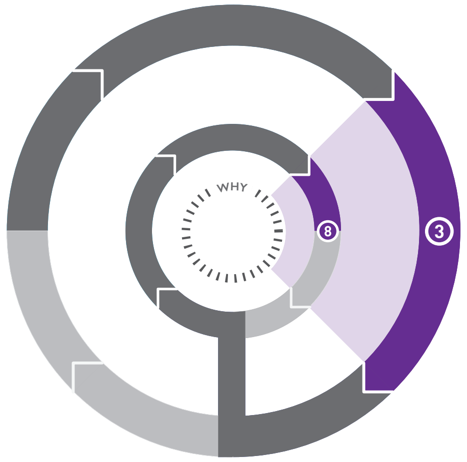
WHY USING IT

It is useful to be sure to touch and analyze all relevant aspects of the social innovation in order to communicate and evaluate them properly.
Among the audience of the pitch there are likely to be also possible investors so one of the main purpose of the presentation is to convince who is listening. For this reason is better to be as clear and brief as possible in order to transmit solid concepts.
The material prepared for the pitch becomes the heritage of the company.

WHEN TO USE IT

HOW - VIABILITY

Usually in stage 8, when the company is already formed and is trying to figure out how to communicate its core activities in an effective way in order to reach potential investors.
"The Pitch Deck" is intended to organize all the material in a logical way and prevent to miss out important messages.



PITCH DECK

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1 NEEDS AND CHALLENGES

What is your project about? Have you identified a social need or a challenge which you can address or have you seen an opportunity in some market? What problem or gap are you solving?

2 YOUR SOLUTION

The product/service: explain in detail the process, key stakeholders and their interactions.
How the product/service works?

3 THE MARKET OPPORTUNITY

Can you quantify potential markets/customers or put a value on the market (currently and into the future) and will the opportunity continue to grow? What is driving this growth opportunity?

4 POSITIONING

Where do you position your company compared to the already existing ones?
What is your unique value proposition?

5 YOUR BUSINESS MODEL

How you plan to generate social impact and sustain the company? Can you generate recurring revenue and can you grow this? Is the business model B2B, B2C, etc?

6 ROUTE TO MARKET

How will you access the market regionally and nationally (your route to market). Address distribution agreements, resellers, licensing agreements, etc. and your marketing plan - how you plan to grow?

7 SUSTAINABILITY

Have you completed your Profit&Loss and cashflow for 4 years (can you demonstrate scalability?) Include a summarized P&L.

8 MANAGEMENT TEAM

How will you scale? Have you the necessary people on your team or, if not, have you identified them? If you don't know them, what skills are needed? What gaps exist and how will you fill them?

9 FUNDING REQUIREMENT

How much funding do you require and what will the funds be used for? Have you any public or other private investment already which makes your project more attractive for other investors?

10 POSSIBLE EXIT STRATEGY

Elaborate a strategy to mitigate failure. How will the investors get their money back?

PITCH DECK

WestBIC

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PROTOTYPE FRAMEWORK

WHAT IS IT

This tool gives innovators a practical and guided sequence of steps to design and plan a prototyping session.
Prototyping a service means producing and delivering the solution temporarily, testing it for a limited time and with a limited user group so it can be improved.
For social innovation, prototyping is not a simple functional and technical test of an innovation's viability and feasibility, but an engaging event (or sequence of events) which aims to activate a broader community of stakeholders.

HOW TO USE IT

The tools will help you to structure a prototype session of your solution. The first task is identifying which phase(s) of your social innovation becomes the object of the prototyping activities: the most challenging ones are the critical points of a service when something may not work. Start planning and setting the stage by:

- Understanding what will be needed during the prototyping phase: what kind of tools, staff, location, atmosphere? which community of users? what kind of measurement's tools?
- Understanding what will happen during the prototyping activity: how to trace feedbacks? how to measure participation? how to observe the prototype?
- Evaluating the effectiveness of the prototyping activity: whcih are the useful feedbacks? how does the solution change according to the results? how to replicate the prototype?

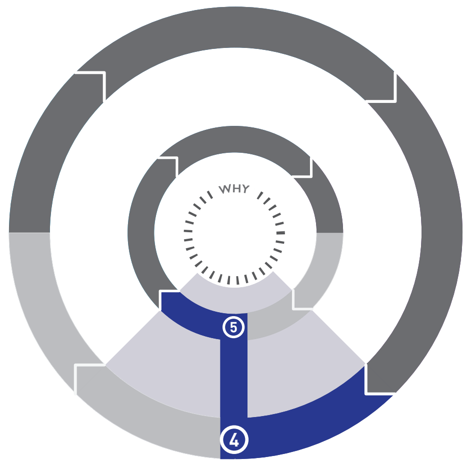
WHY USING IT

The best way to understand a service is to try it out.
Prototyping is an essential phase to build something you can quickly test by interacting with real users (and potential clients), to acquire knowledge on a interaction in a precise situation of time and space, to begin to estimate costs and benefits, to improve the solution before implementing it.
Prototyping allows social innovators to start a relationship with stakeholders, to activate a community and to reinforce a wider network of users and providers.
The Prototyping Framework aims to support social innovators in organizing and running a prototyping session, by providing a list of questions to be checked before, during and after the mise-en-scène of the prototype.

WHEN TO USE IT

HOW - FEASIBILITY

This tool can be used by both early and late-stage social innovation to verify the choices and hypothesis taken along the journey.
The toll can be used several times in order to reiterate the prototyping activity and refine the solution or to test different parts of it.



PROTOTYPING FRAMEWORK

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WHAT	BEFORE	DURING	AFTER
FOCUS	PREPARE	TEST	EVALUATE
Understand and describe which stage(s) of the solution becomes the object of the prototyping activities. Typically these are critical points of the service, where something may not work.	Understand what is needed during the prototyping phase	Understanding what happens during the prototyping activity.	Evaluate the effectiveness of prototyping activity.
	LOCATION	OBSERVE	ANALISE DATA
	WHEN/DURATION		
			POINT OUT USEFUL FEEDBACKS
	TOOLS	REGISTER COMMENTS AND FEEDBACKS	
	STAFF		VISUALIZE MODIFIED PARTS OF THE SOLUTION
	USERS AND COMMUNITIES	MEASURE	
	MEASURING TOOLS		WHAT WOULD YOU CHANGE IF YOU COULD PROTOTYPE AGAIN ?

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RESPONSIBLE MARKETING PITCH

WHAT IS IT

The tool is a replicable workshop.
During half a day, 10 Social Innovators pitch their Social Innovation in front of 30 people (for example: 1 expert in communication, 2 experts in social/environmental impact, and a majority of social innovators) who give their feedback in real time.
With the support of some signs (left side of the tool template) and a feedback document (right side), people listening can express immediately their feedback in a immediately perceivable way.

HOW TO USE IT

Each SI pitches his innovation and its impact in five minutes, then, after each presentation, the audience is asked two questions:
1. Have you been convinced/seduced by the pitch?
2. Do you prefer the content, the form or both?
For the first question, each member of the audience should raise only one of the two sign given with the tool to express his opinion. For the second question each person can raise one or both signs given.
Then, the votes are counted.
At the end, attendees write their feedbacks in a document (see the right side of the tool template).Then, all the feedbacks are analysed by the incubation team who gives the results back to each SI who pitched.

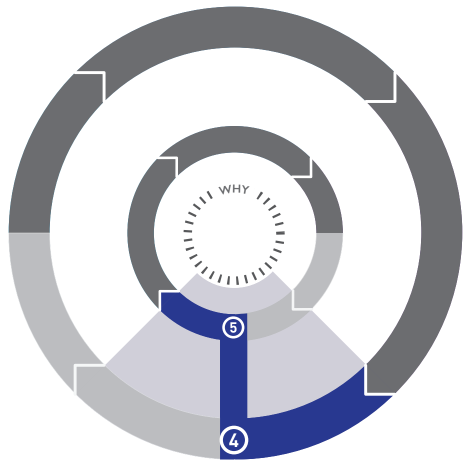
WHY USING IT

This tool has the aim of collecting feedbacks from an audience of both experts and interested people. It is a simple and intuitive way to assess both the effectiveness of a presentation and the content proposed by the social innovator.
It simplies the discussion by structuring it around 2 main questions, but it still encourages the audience to write down suggestions and precise advices to the social innovators by filling the template.

WHEN TO USE IT

HOW - FEASIBILITY

This tool suits best the later stage when the SI work on their communication and they wonder whom they can target with a communication on their social impact.
But can be used also in the early-stage to engage a collective conversation and get important feedbacks.



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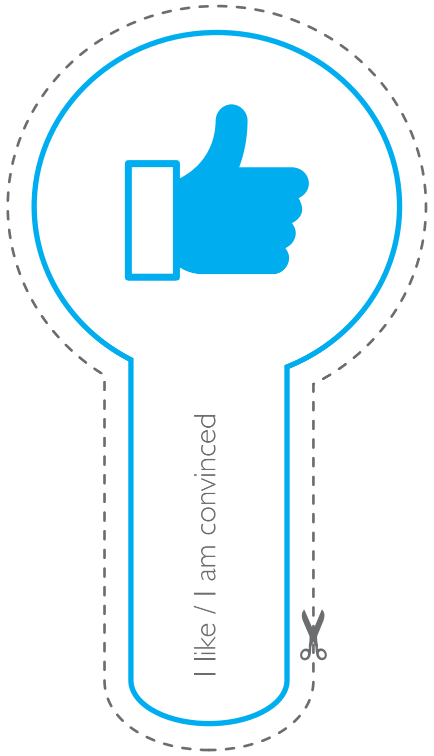
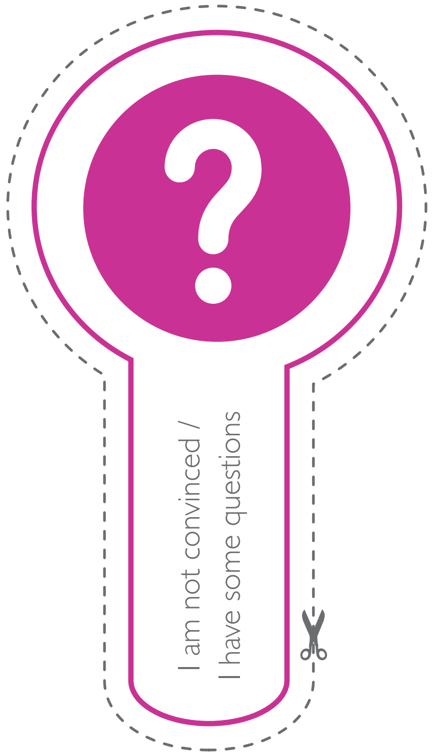
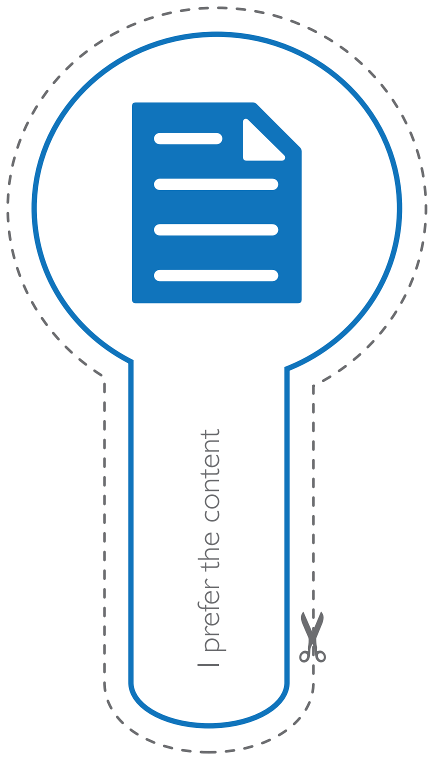
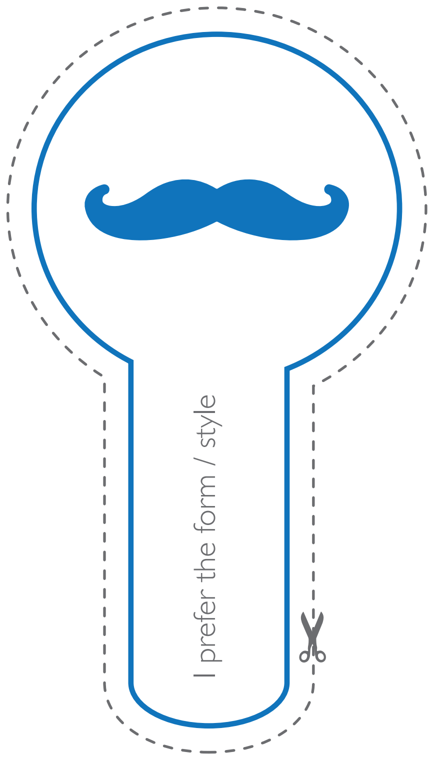
1. Have you been convinced/seduced by the pitch?





2. Do you prefer the content, the form or both?





Discussion member n°_ _ _ _ _

affiliation logo

picture

Can you briefly define what do you remember of this presentation, the key message, something that marked you?

____

____

____

____

In your opinion, which is the most relevant action that this enterprise can take in order to achieve a sustainable development?

____

____

____

____

In your opinion, what can be improved both in terms of contents and form?
Do you have any suggestion to share?

____

____

____

____

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SOCIAL INNOVATION SCANNER

WHAT IS IT

The Social Innovation Scanner helps to self assess and monitor the expected social impact of the solution and to identify which are the actions that produce and generate positive effects.
Evaluating social impact is a complex task, especially for early-stage innovations, lacking of experience and data. This tool gives a first overview of seven qualities corresponding to seven different areas that are positively impacted by innovations that adopt a wide social perspective. In each of them, a question helps the social innovators to reflect upon their solution and the related impact; a set of examples provides additional suggestions on the ways this can be reached.

HOW TO USE IT

Write the name of your solution in the center and for each branch of the graph:
- read the question and consider each example listed below;
- give a score (0 - 5) and mark it on the respective lenght: 0 is the minimum, 5 is the maximum;
- explain and list each concrete action that contributes to reach the selected mark: e.i.: how does your solution enable "participation"?.

By joining all the marks you will obtain a figure, which is supposed to be filled in order to highlight an area. This area should give the team the idea of the orientation of the solution towards social innovation qualities.

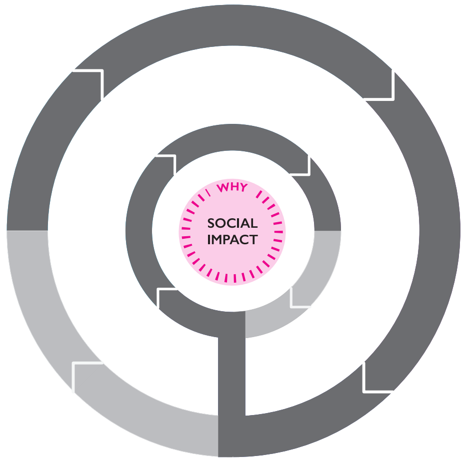
WHY USING IT

The Social Innovation Scanner helps making emerge the potential social impact of the innovation, turning since the beginning the focus on this. It contributes to understand how the offer supports and enhances the qualities promoted by social innovation practices.
This tool can be used to design and develop a new solution as well as to transform an existing venture, by reorienting its action towards more societal challenges and goals.

WHEN TO USE IT

WHY - SOCIAL IMPACT

This tool could be used both at early stages when designing and developing an idea and at later stages when exploring the positive impact produced by the solution or when reorienting the business toward more societal goals.



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1. CAPACITY

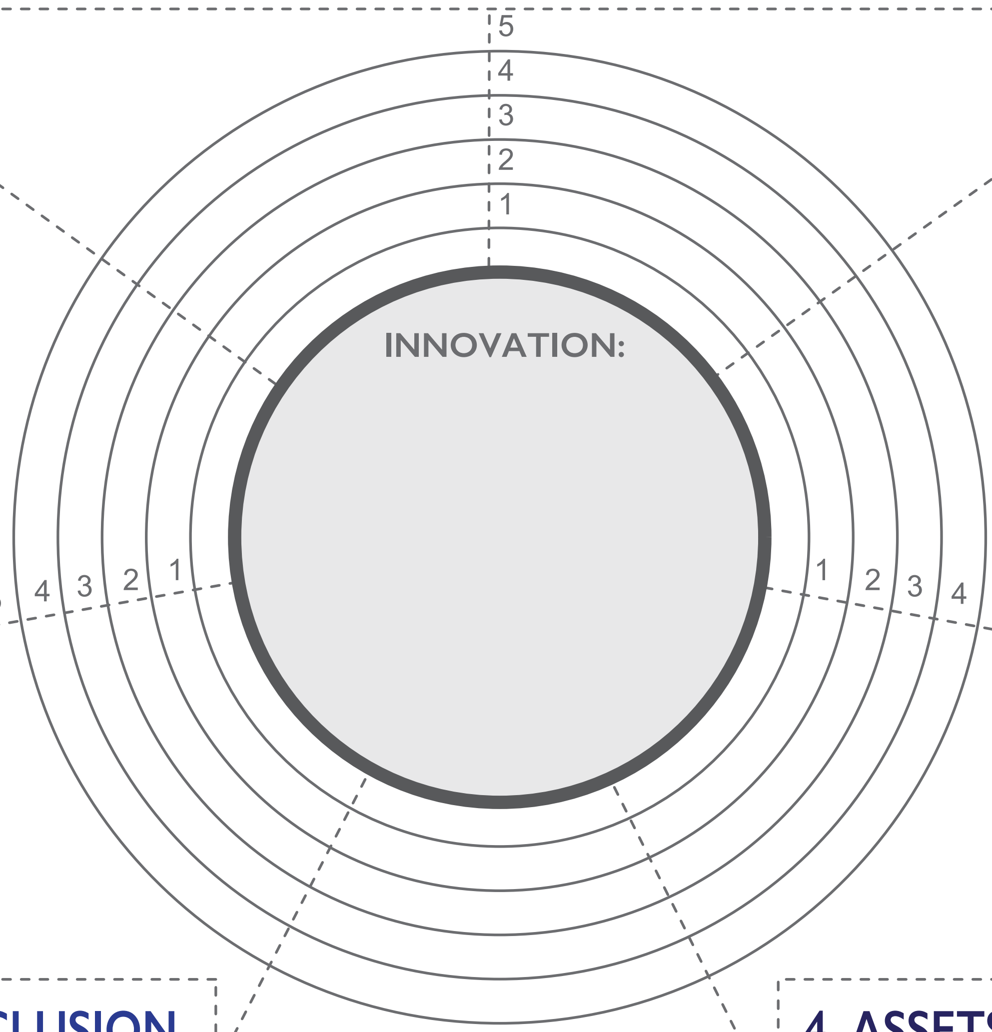
Does the innovation build competence and capacity across society?
pro-activity, self-organization, capacity to act.

7. ENTREPRENEURSHIP

Is the innovation viable and financially sustainable?
local entrepreneurship, job creation, involvement of young people and marginalised or fragile people

2. WELLNESS

Does the innovation contribute in creating wellness and collaborative contexts for the whole sosciety?
self- determination and recognition of common rules, intrinsic motivation, meaningfulness of experiences, trust, mutual support, sense of safety and securuty.



6. ENVIRONMENT

Does the innovation foster a fair distribution of social, economic and environmental resources?
decrease of inequalities; fairness of the contexts;
reduction and intensification of the use of resources;
infrasctructures nudging virtuous and sustainable behaviours.

3. PARTICIPATION

Does the innovation increase participation and sense of belonging?
democratization of processes, transparency of decisions, strategic perspective.

5. IDENTITY AND INCLUSION

Does the innovation strengthen the sense of social and cultural identity, fostering inclusion?
self recognition in the diversity, cultural diversity and vivacity,
sharing of aims despite the differences, social and cultural inclusion

4. ASSETS: SPACES, GOODS, SERVICES

Does the innovation increase the variery of spaces, goods and services available for fullfilling the diversity of everyday lives?
responsability taking by the community, collective ownership, self management,
liveability, flexibility of places, evolution of functions.

SOCIAL INNOVATION SCANNER

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SOCIAL COPY STRATEGY

WHAT IS IT

The Social Copy Strategy derives from a well-known and diffused tool used by communication agencies and strategists.
In its original use it is a synthetic document that works as the main reference in developing all the advertisement projects of a company. It contributes to maintain the consistency of any communication plan with respect to the company policy, strategy and general objectives.
Applied to social innovation, it helps to communicate the social benefits and core values of the project to the targets, by clearly identifying the social promise.

HOW TO USE IT

The model itself has some useful annotations in each section that can help you to fill the blanks. Following the numbers will help you in developing your social copy strategy.
The Social Copy Strategy encourage you to identify and connect:
- The Social Promise: the expected social benefits that make the solution/offering worthy and valuable.
- The Reason Why: the features and the rational reasons that make the solution/offering plausible and trustworthy.
- The Target(s): the users of the solution/offering and their involvement.
- The Distinctive Values: the values that inform the solution/offering and that are brought to the users and to the society at the large. The way how these values are expressed.

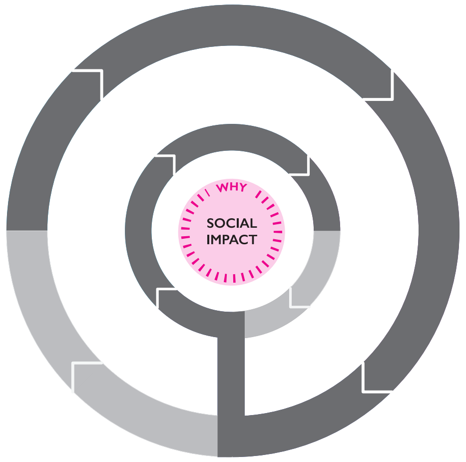
WHY USING IT

Often the development and scaling up of a solution makes innovators concentrate more on operational details such as viability of the project, feasibility, fundings, than on the motivational and aspirational model that their solution proposes.
The Social Copy Strategy helps social innovators to keep the focus on the expected social benefits (the social promise), which are the core elements of their offering. More important it forces them to reflect on the rational reasons that support the social promise: these are the reason why a solution is perceived as plausible and trustworthy. Both the social promise and reason why are connected to the users of the solutions (the targets) and evaluated by them.
This way of reframing and describing a solution let the distinctive values emerge and helps innovators to understand how the values are expressed and communicated to the users and to the society.

WHEN TO USE IT

WHY - SOCIAL IMPACT

This tool can be used by both early- and late-stage innovation in order to develop a consistent strategy of communication of the social benefits



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3. REASON WHY

The features and the rational reasons that make the solution/offering plausible and trustworthy.

1. SOCIAL PROMISE

The expected social benefits that make the solution/offering worthy and valuable.

2. TARGET(S)

The users of the solution/offering and their involvement

4. DISTINCTIVE VALUES

The values that inform the solution/offering and that are brought to the users and to the society at the large.The way how these values are expressed.

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RESPONSIBLE INNOVATION GRID

WHAT IS IT

The tool is an analytical grid and a methodology for evaluating the potential social, economic and environmental impacts of an innovation project.

This guiding document will begin by providing a detailed analysis of the responsible innovation concept, starting by a dissection of the term, to clearly define what the terms 'innovation' and 'responsibility' mean in their own respect. It will then progress to the practicalities of the concept and suggest a method for integrating responsible innovation into a firm's strategy and how it translates into a process.

The full guide to the document could be found here: www.karimnetwork.com

HOW TO USE IT

The grid is used after one to one meetings with innovators. During these meeting the consultants ask questions to the entrepreneurs and social innovators. When consultants have enough information on the innovation project, they complete the document together with the innovator.

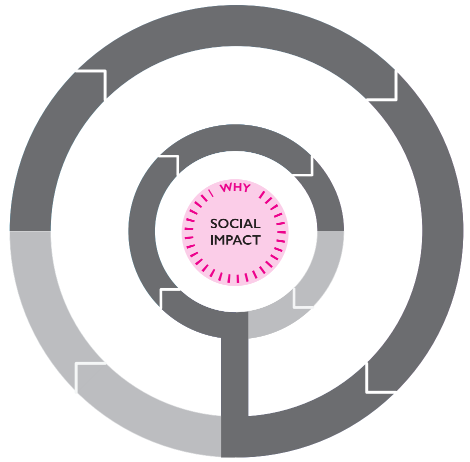
WHY USING IT

The grid contains 24 criteria. It is an "assistant" to translate sustainable development objectives into an innovation project. It helps to identify the looming questions and margins for potential progress. It shows the way forward by questioning users on the potential changes to make or paths to take. The grid should offer an opportunity to create a project dynamics and to develop corrective actions.

WHEN TO USE IT

WHY - SOCIAL IMPACT

It is most suitable for later stage (prototype) or even the last stage, when assessing the effective social impact of the company.



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Characterization of the innovation project

	Status: To undertake	Status: In progress	Status: Undertaken	Reliability: High uncertainty	Reliability: Moderate uncertainty	Reliability: Low uncertainty	Comments
Marketing feasibility (needs, competition, marketing, added-value, positioning...)	☐	☐	☐	☐	☐	☐	
Technical feasibility (research, prototype, pilot, experimentation)	☐	☐	☐	☐	☐	☐	
Financial feasibility (budget, financing plan, estimated profitability, subsidies)	☐	☐	☐	☐	☐	☐	
Organizational feasibility (project manager, team adapted to the project, external collaboration)	☐	☐	☐	☐	☐	☐	
Legal feasibility (regulation, intellectual/industrial property)	☐	☐	☐	☐	☐	☐	
Distrubution/ Commercialisation	☐	☐	☐	☐	☐	☐	

Coherence Project/Company

	Yes	No	Comments
Project in the core-business or in the market of the company. Consistent with the company's vision	☐	☐	
Project's size adapted to company's size	☐	☐	
Sufficient financial resources of the company with regards to the project	☐	☐	

Expressed needs and expectations

Technology (advice orientation, search...)	☐	Team / HR / internal organisation	☐
Offer / Value proposal / Economic model	☐	Search of strategic partners	☐
Competition / Market	☐	Legal (orientation)	☐
Sustainable development	☐	Project engineering	☐
Industrial / Intellectual property strategy	☐	Financing	☐
Europe / International	☐	Biomimicry (training, advice, diagnostic)	☐

Other needs (to be detailed):

Detailed needs / Comments:

Responsible Innovation analysis

Assessment criteria

(*) **The level of consideration of a criteria** is defined as the evaluation of the type and relevancy of the set of actions started in order to:
. Assess, limit the negative effects or enhance the positive effects of the innovation
. Strengthen the success of the innovation by anticipating in the short, mid and long term.

	Assessment criteria	Level of the consideration of the criteria (*): Little / Not at all	Insufficient	Not relevant / Divided opinion	Well	Very well	This project presents a high value with regards to the criteria	Not addressed
Project approach	Management of stakeholders	☐	☐	☐	☐	☐	☐	☐
	Prospective / Network / Anticipation	☐	☐	☐	☐	☐	☐	☐
	Risk management	☐	☐	☐	☐	☐	☐	☐
	Responsible value chain	☐	☐	☐	☐	☐	☐	☐
	Ethics and transparency of the offer	☐	☐	☐	☐	☐	☐	☐
	Responsible design of the product	☐	☐	☐	☐	☐	☐	☐
	Corporate social responsibility	☐	☐	☐	☐	☐	☐	☐
Environmental impacts	Water management	☐	☐	☐	☐	☐	☐	☐
	Materials management	☐	☐	☐	☐	☐	☐	☐
	Energy management	☐	☐	☐	☐	☐	☐	☐
	Pollution (water, air, soil)	☐	☐	☐	☐	☐	☐	☐
	Greenhouse gas effect	☐	☐	☐	☐	☐	☐	☐
	Biodiversity	☐	☐	☐	☐	☐	☐	☐
	Waste management	☐	☐	☐	☐	☐	☐	☐
Social impacts	Health	☐	☐	☐	☐	☐	☐	☐
	Safety	☐	☐	☐	☐	☐	☐	☐
	Quality of life	☐	☐	☐	☐	☐	☐	☐
	Solidarity	☐	☐	☐	☐	☐	☐	☐
	Common good	☐	☐	☐	☐	☐	☐	☐
Economic impacts	Product's life cycle cost	☐	☐	☐	☐	☐	☐	☐
	Economic sustainability	☐	☐	☐	☐	☐	☐	☐
	Value creation and sharing	☐	☐	☐	☐	☐	☐	☐
	Business model	☐	☐	☐	☐	☐	☐	☐
	Macro-economic impact	☐	☐	☐	☐	☐	☐	☐

Vocation of the project

Generally according to you, does the project allow to answer to?	Totally disagree	Disagree	Divided opinion	Agree	Totally agree	Comments
A major environmental need	☐	☐	☐	☐	☐	
A major societal need	☐	☐	☐	☐	☐	

Additional analysis:

. Overall view on the innovation project (Strong points, improvement axis, recommendations)
. Orientations (Contacts / Connections / Useful information…)

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