

## **Introductory Brief on B Lab Global “Insights” Function, i.e. Research and Analysis**

### **May 2021**

B Lab Global’s town hall on structure at the Global Network Assembly shared the creation of a “Research and Analysis” function that will be key to delivering our organizational objectives and overall theory of change now and in the future. While the development of this function is scheduled more earnestly for the second half 2021, this briefing is intended to share a bit of context about what this function will do, why it matters, and where things currently stand.

#### **Summary:**

- In order to effectively achieve our theory of change, it is necessary for a more concerted effort to: measure our own organizational impact, make more data informed decisions regarding our theory of change, and leverage our data and positioning as a standards organization to amplify our vision of a new economy. Achieving this is not simply a matter of pulling data; it is also necessary to improve the data we have, and embrace a culture shift towards effective monitoring and evaluation across all aspects of our network.
- While part of this work is a collective responsibility across the network, including global partners, it is also necessary to have a specialized function that leads on the development and dissemination of frameworks and tools, and on engagement with external partners.
- The team will have 3 FTE’s onboard in the second half of 2021, including two existing team members in Michele Bradley and Charlie Fraioli, as well as a new “Insights Director,” to be hired. Dan Osusky will oversee the team.
- There is a lot of work to be done related to this function, including the development of a clear structure and strategy for B Lab’s own monitoring and evaluation, a needs assessment to ensure the proper data and structures exist to deliver on that strategy, as well as a strategy for broader engagement with the research community and thought leadership. There are also short term needs, including grant requirements around research on the SDGs and job quality, and an SDG Insights report.
- Particularly as the team is transitioning into these roles and new hires are onboarded, bandwidth to pursue these efforts is limited. The second half of the year will largely be foundational and focused on planning and development. Through all of these stages, touch points with different teams and the Global Network will be established to gather input and feedback.

#### **Current Status and Challenges Related to Research and Analysis:**

##### *Overall:*

While we’ve had a lot of success as a network and movement since our launch, we’ve also struggled to be able to both measure and articulate that success in terms of concrete impact.

This has not only affected our ability to communicate the importance and relevance of our work, but also affected our ability to make data and impact driven decisions around our strategy and resources. The most recent Theory of Change and strategic planning process highlighted the importance of us addressing these needs and presents the ideal opportunity to do so, in coordination with global partners and all relevant teams within B Lab Global.

To do so, of course, requires not only a concrete strategy and implementation plan, but the resources to develop and implement them. Currently, the individual most historically involved in this work, Michele Bradley, has been wearing many hats and currently sits on the technology team, serving and supporting B Analytics needs to serve existing clients, while assisting with various data related projects like Best for the World. (Huge kudos to Michele for both persevering through these transitions and continuing to keep so many important initiatives going!)

### *Monitoring and Evaluation:*

Previous work has been done to develop an overall approach to monitoring and evaluation for B Lab's work several years ago, with an intent to create a framework to both measure and communicate the impact of the B Corp community, as well as the impact of the work of B Lab itself. This process led to the existing ability to present specific identified metrics about the B Corp community compared to other BIA users in the form of "impact memes," as well as incremental efforts to further standardize the BIA to allow for more comparable and useful data. It was, however, only partially implemented as a result of staff turnover and prioritization decisions.

In addition to that work, specific measures and frameworks have been discussed, or developed, in specific areas and on an as needed basis, with specific energy from certain global partners in developing their management strategies, and programs like the SDG Action Manager.

In addition to the will and culture needed to make these efforts successful (itself a very important thing that we need to engrain throughout our organizations), specific challenges include data comparability and accuracy across different tracks and versions of the BIA, insufficient comparability and/or access to data sets that exist outside of our platform, and incomplete "outcome" data both related to B Corps and our work.

It's also important to note that, while we all believe in the impact of our products and community, we should not assume that the creation of a monitoring and evaluation framework will suddenly create a robust and positive story about our impact - it's quite possible that we'll find the results to not be as great as we'd like, and so importantly need to prioritize these efforts as an opportunity to learn and inform our decisions to improve first, rather than just a purely marketing or communications effort. For example, we might find that companies don't perform as well as we'd like on issues that we deem most important - even if they perform better overall, or we might find that using the BIA can't be attributed to company's making material improvements

over time. This is part of what we are exploring as part of the Performance Requirements review and also part of why connecting M&E with our standards is so important.

*Broader Research (by B Lab and Academics):*

B Lab has had a few longstanding relationships with the academic community with regards to research, and has had a few isolated cases of “B Lab developed” publications related to our impact data, relating to specific programs.

B Lab’s first academic research partnership was with Duke University, who managed Requests for Proposals and an academic community related to impact data during early versions of the B Impact Assessment. More recently, B Lab has engaged with the University of Pennsylvania and their [“WRDS”](#) platform, a commonly used academic research platform to house B Lab’s data (including anonymized question level answers for all users, not just B Corps like the [Data.World](#) dataset) for research purposes. This effort was made possible by grant funding and included substantial work by both B Lab (specifically Michele!) and UPenn to prepare the data and ensure that it respects the privacy and confidentiality of our users, and is currently in use in pilot phase for two RFPs that were also specifically funded projects, one about job quality and the other about the SDGs (WRDS and the RFPs were available for researchers around the world).

Of course, both in connection with these efforts and beyond, B Lab has had longstanding relationships with the B Academic community and Academia B.

Usage of our data by researchers, from the onset, has produced mixed results; while some academics have been able to use and gain specific interesting insights from our data, it is challenging, and many others have struggled to replicate that success. Academics need specific skill sets in data science to be able to effectively use our dataset, in addition to having specific research questions that are particularly relevant for our data. We will also need to explore the long term viability of the WRDS platform and partnership with UPenn for research purposes, and thus for all these reasons research data is not openly available to all researchers at this time.

*For all of these reasons, we are pleased to be developing an Insights team to carry this historic work forward in a way that can accelerate, and continue to test, our Theory of Change and objectives, while also increasing our credibility in the public domain. While subject to change based on feedback and lessons learned, below are some details about the team and our plans.*

**Insights Team Purpose and FTEs:**

To enable and produce credible and data driven insights to help B Lab and others pursue its theory of change and goal of creating an inclusive, equitable, and regenerative economy.

3 FTEs by middle of 2021. One Insights Director (new hire) and two Senior Analysts (internal team members).

### **Scope of Activities:**

- Set and implement insights strategy in coordination with B Lab Theory of Change and Objectives
- Analyze data to inform standards improvements
- Produce external insights on key topics related to B Lab's theory of change, including but not limited to B Lab's impact as an organization
- Engage, support, and partner with research organizations and academics on key topics related to B Lab's theory of change
- Manage a monitoring and evaluation framework to support program leads, global partners, and other decision makers in their own monitoring and evaluation and strategic decision-making
- Manage and improve B Lab's dataset to ensure optimal usage and value internally and externally

The team will work closely with:

- Communications team to identify and optimize opportunities to position data and standards based insights and thought leadership
- Strategic Growth to identify and support on M&E needs for funders (and similarly position B Lab data and standards thought leadership in way to optimize B Lab's credibility to funders)
- Strategic Planning, Programs, and Product Teams to actively support monitoring and evaluation frameworks and data (Note that this will be in a support or consultative role. While other teams are themselves responsible for managing the development of their monitoring and evaluation framework to best integrate it into their programs' design and decision making, the Insights team will assist in pulling data and consulting on their monitoring and evaluation framework.)
- Technology team to ensure data accuracy and integrity and tech specific needs to enable team purpose
- Global Partner teams to partner with them in applying the monitoring and evaluation frameworks, utilizing our data to make informed decisions, coordinate efforts, and identify research and data related opportunities in a global context

### **Objectives for 2021:**

- Produce SDG Insights report per grant requirement, as learning pilot for future external "insights" reports (draft June - publication in September)
- Maintain and deliver other research related grant requirements and integrate lessons into future strategy
- Successfully define and transition the team, including completing necessary initial professional development needs

- Develop and begin implementing M&E Framework with internal engagement of relevant teams (with some external engagement as well), (with aim of being able to produce a B Lab impact report for 2021)
- Begin establishing key relationships and potential partners, internally and externally (Global Partners, Funders, B Academics / Academia B, Globescan, etc.)
- Support Performance Requirements 2.0 with data driven insights and research, definition of success metrics, and inputs to ensure project optimizes future insights and monitoring and evaluation
- Support design of Standards Management tool to better manage standards related data
- Conduct end of year retrospective with internal stakeholders to review structures and deliverables to identify successes, weaknesses, key pivots, and future resourcing needs

For questions about the team, and planning, reach out to Dan at [dosusky@bcorporation.net](mailto:dosusky@bcorporation.net) (or on Slack). For specific questions about current state of research and data, Michele at [mbradley@bcorporation.net](mailto:mbradley@bcorporation.net)