



# **B LAB GLOBAL JEDI THREE-YEAR STRATEGIC PLAN 2022 - 2025**

## **PREPARED BY**

IDEAS Generation in partnership with the B  
Lab Global JEDI Strategic Planning Working  
Group



# Table of Contents

<b>1</b>	<b>Introduction</b>
<b>3</b>	<b>Executive Summary</b>
<b>4</b>	<b>Theory of Change</b>
<b>5</b>	<b>Embedding JEDI Baselines</b>
<b>6-9</b>	<b>Strategic Plan</b>
<b>10</b>	<b>Strategy Screen</b>
<b>11</b>	<b>Conclusion</b>
<b>12</b>	<b>Note of Gratitude</b>
<b>13-35</b>	<b>Appendix</b>
	<b>The Working Group Demographics</b>
	<b>Methodology</b>
	<b>JEDI Pillars &amp; Theory of Change</b>
	<b>Root Cause Analysis</b>
	<b>Measurements</b>
	<b>Strategy Screen</b>
	<b>Implementation &amp; Recommendations</b>

# Introduction

The B Corp movement envisions an inclusive, equitable, and regenerative global economic system for all people and the planet. Our Theory of Change (further details located in the following sections) seeks to drive economic systems change by changing: 1) the behavior and operations of business, 2) the legal rules and structures that govern business, and 3) the norms, narratives, and cultural expectations about business. We believe that by altering the behavior, culture, and structures of business, we can effectively address three interrelated challenges that negatively impact people, communities, and the planet:



B Lab's antiracism stance states that in order to be accountable business leaders, we must tackle racism and stand against injustice. However, given the mountainous endeavor before us, the questions remained - How can we take the understanding gained from our learnings about racist and prejudiced systems & policies, and apply that to how we actualize our Theory of Change? And where do we start?

Strategic planning is an organization's process of defining its direction, designing tactics to achieve its goals, defining control mechanisms to guide implementation, and setting metrics to gauge progress. This JEDI Strategic Plan is not parallel to our Theory of Change and Global Strategy - it is complementary. The plan sets a direction based on our JEDI Baseline Principles and outlines tactics to implement these principles in every aspect of our work, including internal practices, policies, and ways of working and external Global Strategies and Programs.

In our continuous JEDI journey, we aim to discuss and tackle inequalities on a global scale, decentering the United States in the process. There is no one-size-fits-all approach to the principles of justice, equity, diversity, and inclusion. While there are common threads across themes like gender inequity, racism, and classism, there are also nuances, including but not limited to, caste, colonization, education, and healthcare.

With an ever-expanding community of B Corps and Global partners, a growing internal team, and an increased need to embed and sustain JEDI across stakeholder groups, the process outlined in the following pages sheds light on the aspects of our “global” conversation that we were ill-equipped to have. We elevate and acknowledge that we’ve discovered several gaps which we are committed to mitigating as we move forward:

1. Globally-centralized JEDI infrastructure
2. Insufficient globalized understanding and alignment on JEDI principles regarding racism, the concept of “Blackness” and other polarizing topics
3. A tendency to label initiatives as “Global” without operationalizing a truly Global framework; intention does not match the impact

The JEDI-centered strategic planning process entailed:

- Identifying the most culturally relevant and appropriate strategic planning model to cultivate a JEDI Strategic Plan for B Lab Global
- Facilitating sessions with a diverse array of stakeholders to address potential paths to realize B Lab’s three JEDI Pillars of Focus: Racial Equity & Justice; Distributing Leadership & Shifting the Power of Influence; and Accountability
- Conducting a Root Cause Analysis of each JEDI Pillar and a review of the B Lab Global Networks’s Theory of Change
- Creating a ‘strategy screen’ through which to vet all future JEDI-related decisions from a strategic lens
- Developing a strategic plan
- Providing project management, design, and communications guidance and support

### **B Lab Global’s JEDI Strategic Plan & the Global Partner (GP) Network**

The Global Network is made up of dozens of regional and country partners, and the B Corp Movement consists of more than 4,000 B Corps across 77 countries and 153 industries, plus tens of thousands of users of B Lab’s tools for impact measurement and stakeholder governance. Creating a JEDI Strategic Plan for this large and diverse group is not yet possible, something which became even clearer through this process. We hope that by enacting this plan, B Lab Global (BLG) will be better equipped to lead similar regionally-inclusive processes with GPs prior to 2025. By building a knowledgeable infrastructure of humans, processes, and policies across the network, we can find local solutions to Global problems, applying JEDI principles in standardized ways.

We hope this guide will be useful to Global Partners (even if BLG’s priorities may not fully resonate ) as:

- A guide to understand B Lab Global’s overarching JEDI strategies which can be adapted for local, national, and regional priorities, and
- An outline which provides useful insights into aspects of the process and framework - from building equitable groups to creating an accessible resource to asking inclusive questions

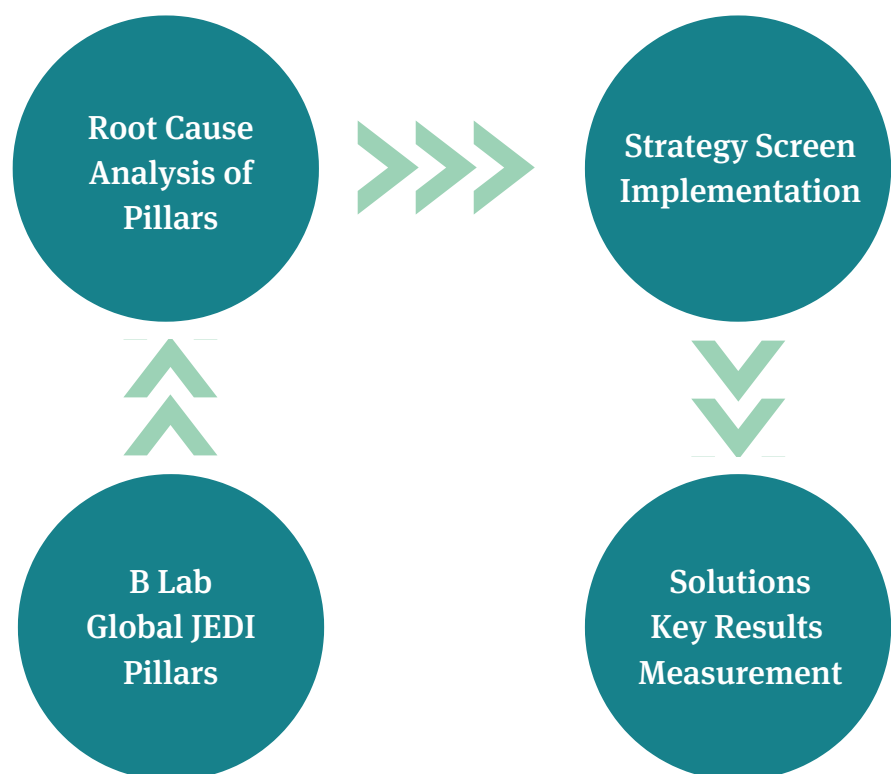
# Executive Summary

The strategic plan offers tangible ways to embed Justice, Equity, Diversity, and Inclusion (JEDI) into the ethos of B Lab Global. The Strategic Solutions and accompanying Accountability/Measurement outcomes have been identified through an intentional and rigorous process of data collection from team members, visioning, ideating, stakeholder group conversations, and root cause analyses of the JEDI Pillars.

B Lab Global's JEDI Pillars - Racial Equity & Justice, Shifting Power & Distributed Leadership, and Accountability - were used as guideposts for the JEDI Strategic Plan. Throughout the process, we sought to create clear and direct connectivity between the Pillars, our Global Strategies, and the Theory of Change.

All of the Strategic Solutions were designed to address barriers to each of the three pillars. Through a Root Cause Analysis, we asked "What is keeping us from actualizing this pillar?" Once we identified the root causes of these barriers, the Strategic Planning Working Group designed solutions and key results to measure progress towards our goals.

The recommendations outlined in the JEDI Strategic Plan are expected to be fully implemented over a three-year period ending in 2025. Successful implementation of the JEDI Strategic Plan is expected to create the cultural and infrastructure changes necessary to achieve B Lab Global's JEDI vision as well as our Global Vision and Theory of Change.



# Theory of Change

By redefining the role of business as a force for good within the system, B Lab can positively impact and change the nature of the system itself to become more inclusive, equitable, and regenerative. As B Lab looks to achieve its expanded vision, the Theory of Change ('TOC') details five strategies to guide global efforts:

1. Drive the adoption of B Lab's standards to manage the impact of business
2. Certify and engage business to improve impact
3. Broadcast business as an equitable force for good
4. Catalyze policy change to enable business as a force for good
5. Develop a network of local, regional, & global communities for change

More information can be found in Appendix

## Theory of Change - Global Strategies



The enabling global strategy of B Lab Global Network is to drive the adoption B Lab's equity-driven standards that manage the impact of business, guide accountability and empower credible leadership.

This enables & catalyzes secondary strategies to be implemented directly or in partnership, depending on context, maturity of the regional or local B Movement.



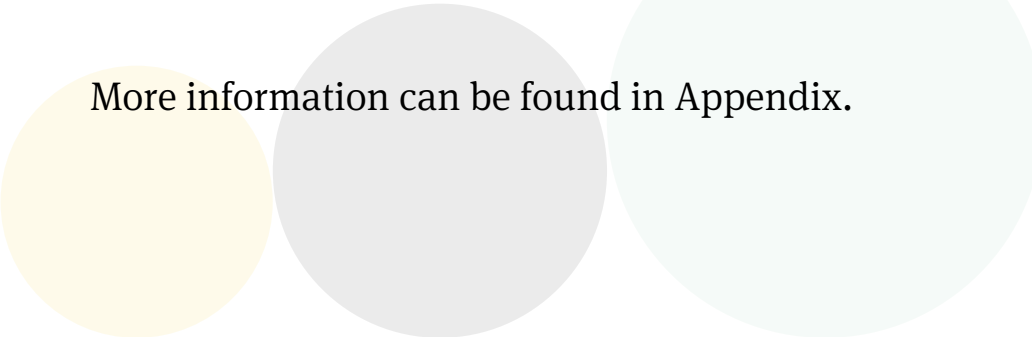
# Embedding JEDI Baselines

The B Lab Global JEDI Baseline Pillars of Focus: 2021 (available in 5 languages) are the identified areas of JEDI focus that will equip the organization to deliver on our existing goals and objectives. Furthermore, the pillars can support individuals and organizations with gaining the acumen needed to embark upon the next leg of our JEDI journey. The Pillars informed the foundations of the JEDI Strategic Plan.

What would it look like if B Lab lived in line with the principles of these Pillars? When thinking of our Global vision of an inclusive, equitable, and regenerative economic system, the pillars must be the levers that we pull to inform our “How”. JEDI is the way by which we build teams, cultivate leaders, and conduct business as a force for good. The benefits of inclusion would be evidenced in our goals, culture, policies, practices, and experiences across the network. In addition to the gaps acknowledged in our Introduction, it is important to call out that the creation of this plan was also limited by Pillars themselves:

- There are sets of questions and considerations that are presented with the Pillars that encourage teams to allow those closest to the work to decide. Rightfully so, this limited B Lab’s locus of control. Unable to make decisions for the network, the planning committee opted to use these parameters to select strategies identified in the root cause analysis that were within B Lab Global’s control.
- Additionally, the Pillars encourage decision-makers to seek the voice(s) of those who will be affected by the outcomes of their decisions. The feedback received from the BLG Network Survey gave us pointed feedback which guided our decisions when determining a timeline for the work.

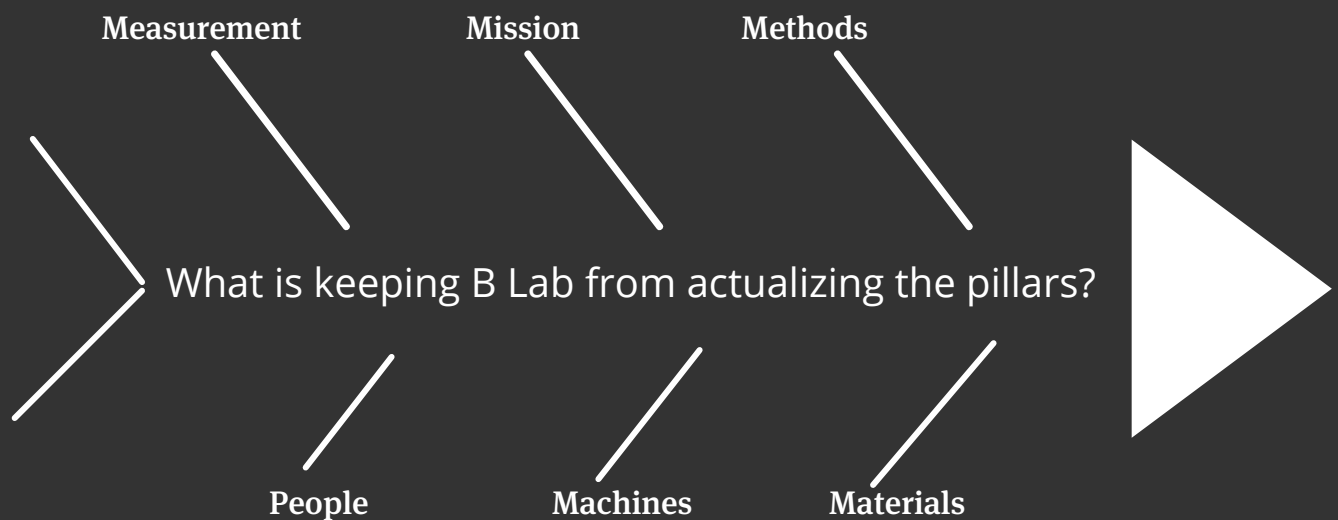
More information can be found in Appendix.



# Strategic Plan

The following information stems from the Root Cause Analysis conducted for each of B Lab's three JEDI Pillars. Curation of the following content was done through interactive conversation with the JEDI Strategic Planning Committee then submitted to the larger B Lab Global Partner Network for additional input.

Additional information can be found in Appendix.



Measurement	Tools or mechanisms in place to evaluate processes
People	Human power, labor or workforce
Mission	Business as a force for good
Machines	Technology and resources
Methods	Processes, policies, procedures, structural
Materials	Pamphlets, manuals, resource guides, etc.



# Racial Equity & Justice

Organizational buy-in by way of comprehensive, intentional, and continual practice of changing policies, practices, systems, and structures by prioritizing measurable change in the lives of people who are regionally marginalized, Black, and/or Indigenous. Race and ethnicity come in various forms that are linked with other diversity factors in myriad ways.

## Root Cause Analysis Key Findings:

- Inefficient tracking of regionally minoritized businesses
- Lack of common understanding of JEDI principles, challenges, and opportunities across global regions.
- Lack of representation and diverse identities at the Board and Leadership levels.
- Disconnect between B Lab's principles and values and how they are embodied by B Lab's leadership and staff.

Timeline	Solution	Key Results
2022	<ul style="list-style-type: none"> <li>• Evaluation and analysis through an anti-racism lens on leadership policies and practices</li> <li>• Create a clear framework for JEDI competencies for leaders, managers, and staff</li> <li>• Formalized framework to embed JEDI principles into the decision-making process</li> <li>• Create a clear framework for JEDI competencies for leaders, managers, and staff</li> <li>• Partner with BLG Insights team to identify data points to measure and track the outcomes of our existing programs on populations who are regionally marginalized</li> </ul>	<ul style="list-style-type: none"> <li>• Recommendations for improvement to leadership policies and practices that are in line with anti-racism practices</li> <li>• Feedback &amp; evaluation tools measure the JEDI competencies and performance of leaders, managers, and staff and support accountability towards the same goals</li> <li>• JEDI framework is applied in decision-making processes and enforced through policy</li> <li>• Feedback &amp; evaluation tools measure the JEDI competencies and performance of leaders, managers, and staff and support accountability towards the same</li> <li>• BLG tracks and measures the impact of our programs, with a specific eye towards JEDI objectives in order to identify gaps that can be addressed to better support regionally marginalized groups</li> </ul>
2023	<ul style="list-style-type: none"> <li>• Develop a resource library that supports deeper learning and understanding of JEDI competencies and practices. Resource Library that grows as we grow. This could be something that is seen as an added value to the certification. And can be a revenue stream from non-B's or pending B's who'd like to pay for access.</li> <li>• Create a Global JEDI group with representation from across the Global Network</li> <li>• Develop accountability mechanisms or leading retrospectives for projects &amp; processes</li> </ul>	<ul style="list-style-type: none"> <li>• JEDI Resource Library provides access to information and training on JEDI topics for staff and for external stakeholders (B Corps BIA users, etc.)</li> <li>• Global JEDI group meets and discusses JEDI-related questions and concerns and supports B Lab Global to ensure JEDI work accurately reflects the needs of the Global Network</li> <li>• Use of retrospectives supports intentional, continuous learning</li> </ul>
2024	<ul style="list-style-type: none"> <li>• Lead assessment of team members' current experience with technology at B Lab to surface barriers to accessibility/usage</li> </ul>	<ul style="list-style-type: none"> <li>• Prioritized list of solutions to improve technology accessibility</li> </ul>

# Shifting the Power of Influence and Distributing Leadership

Clear definitions and understanding of roles, responsibilities, policies, workstreams, and decision-making processes across all team members. Adoption of systems that foster equitable participation and de-center Western/U.S. Centric ideas and styles of work.

**Root Cause Analysis Key Findings:**

- Inadequate use of practices that foster equitable participation/ voice from different individuals, leading some to have disproportionate influence in decision-making.
- Dominant or majority voices disproportionately inform decisions over minority or quieter voices, including in data analysis
- Lack of sufficient training and support to enable staff at all levels to make decisions in their scope.

Timeline	Solution	Key Results
2022	<ul style="list-style-type: none"> <li>• Embed JEDI competencies and learnings in Leadership and Board onboarding</li> <li>• Evaluate board structures and policies for inclusivity and identify missing perspectives &amp; voices</li> </ul>	<ul style="list-style-type: none"> <li>• Board and Leadership have the training and tools to practice and drive accountability for B Lab’s JEDI Pillars</li> <li>• Proposal to expand representation on the Board of Directors and evolve policies &amp; practices for inclusivity</li> </ul>
2023	<ul style="list-style-type: none"> <li>• Review practices and policies to identify issues that prevent equitable participation, voice, and decision making</li> </ul>	<ul style="list-style-type: none"> <li>• Prioritized list of proposed updates to practice and policies</li> </ul>
2024	<ul style="list-style-type: none"> <li>• Create an analysis guideline to help individuals and groups equitably analyze data</li> <li>• Build an accountability framework/lifecycle into the performance process.</li> <li>• Build JEDI &amp; accountability measures into retrospectives</li> <li>• Create a common framework for building a high-impact, "global" team</li> </ul>	<ul style="list-style-type: none"> <li>• Leaders, managers, and staff can assess quantitative and qualitative data/information to make decisions that account for the impacts of those decisions on different groups</li> <li>• Leaders and managers have tools for ensuring accountability through performance evaluations</li> <li>• Teams consistently use retrospectives for learning and to evaluate how the project or process supported JEDI objectives and accountability</li> <li>• Managers and leaders have guidance for building teams with global representation and fostering practices that enable global voice</li> </ul>

# Accountability

Confidence in senior leadership to follow through on committed actions. Individuals and groups take ownership that links to the impact of their decisions. Clear understanding of the workstreams, project ownership, timelines, and measurement for success with contingencies in place.

## Root Cause Analysis Key Findings:

- Lack a definition of accountability (often seen as punishment)
- Lack consistent and clear understanding of the outcomes individuals are being held accountable to and how those are measured.
- Lack of connectivity between B Lab's JEDI Pillars, organizational strategy and governance & leadership practices

Timeline	Solution	Key Results
2022	<ul style="list-style-type: none"><li>• Define Accountability for the organization and the network and support understanding and adoption through training</li></ul>	<ul style="list-style-type: none"><li>• Leaders, managers, and staff understand and drive a culture of accountability with clear results/outcomes</li></ul>
2023	<ul style="list-style-type: none"><li>• Create an accountability framework for Board Members to hold CEO/Lead Executives accountable and vice versa.</li><li>• Create JEDI-specific goals for teams/projects</li></ul>	<ul style="list-style-type: none"><li>• Clear and transparent accountability of the CEO/Lead Executive to B Lab's strategies and JEDI Pillars</li><li>• Individuals and teams can build JEDI goals into projects and team-based work</li></ul>
2024	<ul style="list-style-type: none"><li>• Develop a true and consistent narrative inside B Lab around accountability and ensure that it is communicated clearly in our external narrative</li></ul>	<ul style="list-style-type: none"><li>• Internal audit and tracking of narrative shifts and employer branding projects</li></ul>

# Strategy Screen

In addition to the Strategic Solutions, we developed a Strategy Screen to help the team ensure that strategic goals and priorities are aligned with our JEDI Plan objectives.

The Strategy Screen tool is designed to evaluate new opportunities, projects, or initiatives using specific decision-making criteria. The questions on the screen are intended to provoke dialogue and ensure the JEDI team has discussed and evaluated opportunities from as many viewpoints as possible. Although saying “yes” to each question is not a requirement, the JEDI team should be able to affirm most sections and discuss any areas that need more information or clarity to move forward. As the JEDI team implements the following strategic plan over the next three years, this strategy screen will serve as a guiding north star to ensure new opportunities are aligned with the original goals and outcomes of the strategic plan.

When there are competing strategies/opportunities or goals, the opportunities will be explored based on the following criteria:

- What is the impact of this strategy on the outcomes of our JEDI Strategic Plan (low/moderate/high)?
- What is the level of resource intensity that this activity requires (low/moderate/high)?
- What is the level of risk (i.e. negative impact on the organization x probability the risk will manifest if we don't act upon it) (low/moderate/high)?
- What is the buy-in from stakeholders who are most impacted by this proposed strategy?

The Strategic Screen can be found in Appendix.

# Conclusion

JEDI initiatives introduce opportunities for co-created organizational culture change at the personal level as well as the systemic and network levels. We must continue to move forward through our work together; every leader and team member throughout the hierarchy of power must be willing to experience discomfort and be self-reflective in that discomfort. This includes the uncertainty of doing things differently than we have always done them, reprioritizing work to create more room for JEDI, and redefining our definition of success.


As B Lab Global continues its JEDI work, the movement will rely heavily on and utilize B Lab Global's JEDI strengths and learnings to act as leaders, paving the way for the next steps:

- Many team members within B Lab Global bring their own level of expertise and knowledge into the JEDI conversation. This allows B Lab to broaden its understanding of this work and approach it from an intersectional perspective.
- Team members have shared comfort and willingness to engage in JEDI conversations in the workplace. This comfort is something we can build on together to ensure we continue to deepen our JEDI conversations.
- Team members have a personal commitment(s) to JEDI work both personally and professionally. These commitments will allow us to engage more effectively in accountability work together.
- JEDI fluency exists amongst team members at B Lab Global. This fluency allows us to more effectively communicate across differences.
- We at B Lab Global gave a genuine commitment to social responsibility that includes a sustained commitment to JEDI work.

How B Lab engages and responds to these JEDI strategies is vital to the success of JEDI work. Team members' willingness to examine their position in relation to this work and to each other, and to embrace the opportunity for individual growth as team members and individuals will be a critical factor in success. B Lab will explore and gain more insight in the following three years. As we execute the plan and implement new strategies, new resources, strengths, opportunities, and needs will emerge. It is important to remember we all share a grounding commonality at the base of our differences and we must harness those differences to build new bridges of understanding and progress.

# Note of Gratitude

I would like to thank the members of the JEDI Strategic Planning Committee who, for the past 6 months, have collectively dedicated over 325 hours to this project. Thank you for trusting the vision and sharing candidly throughout the process. Your questions, pushback, optimism and commitment do not go unnoticed. This is part of the unplanned work, the moments only a few of us see, but it will not be thankless. We could not have gotten here without the unique perspectives of each of you and I truly believe that we have taken on one of the most significant challenges on our JEDI journey. Each of us has a tremendous stake in the successful outcome of this endeavor as we work together to achieve this shared vision and plan for our future.

A handwritten signature in black ink that reads "Ellonda L. Williams". The signature is written in a cursive, flowing style.

Ellonda L. Williams, Ed.D.

Director of Justice, Equity, Diversity and Inclusion

## The JEDI Strategic Planning Working Group

B Lab Global's JEDI Strategic Planning Working Group sought to include perspectives from various vantage points, including backgrounds in strategy, community partnerships and, most importantly, JEDI acumen. Our goal was to lead a process that 1.) merged our Global Strategies with our JEDI commitments, 2.) set clear goals, and outlined a plan to achieve those goals. We began our process for strategic planning with a project launch meeting in September 2021. As an external partner, IDEAS Generation led us through the process.

### Working Group Members:

- Camilla Paquette (she/her) - Director of Global Programs, B Lab Global (advisor)
- Dan Osusky (he/him) - Head of Standards Management, B Lab Global (advisor)
- David Leathers (he/him) - Program Manager, Impact Management, B Lab Global (advisor)
- Ellonda Williams (she/her) - Director of JEDI, B Lab Global (decision maker)
- Eilish Kavanagh (she/her) - Director of Finance & Operations, B Lab UK (advisor)
- Emma Schned (she/her) - Director of Strategy & Governance, B Lab Global (advisor)
- Hannah Munger (she/her) - Director, Global Communication & Marketing (advisor)
- Irving Chan Gomez (he/him) - Manager, Global Partner Engagement & Development, B Lab Global (advisor)
- Josh Odam (he/him) - JEDI Specialist, B Lab Global (advisor)
- Marielle Martin (she/her) - Community Engagement Manager: Black, Indigenous and POC segment, Advisor, US/Can BIPOC\* Community (\*title change, TBD)
  - By Proxy: Jorge Fontanez (he/him), CEO, B Lab US & Canada
- Olivia Lee (she/her) - Director of People & Culture, B Lab Global (advisor)
- Vale Jokisch (she/her) - Executive Director, People and Operations, B Lab Global (advisor)
- Global Partner Stakeholders\*

\*Global Partners (GPs) were invited to submit the name of a soul who holds JEDI work, however given the variance of inflection points, not all GPs have this capacity; therefore, additional considerations were taken to gather feedback and insights from this important stakeholder group. While this plan is centralized within B Lab Global, we understand the implications our work has on the Global Network and we seek to involve these perspectives to further identify localized work versus global work, realized locally. We seek to be global in all things, however we recognize there are infrastructure limitations and aim to be clearer when we discuss our JEDI plans and endeavors

### Facilitated and Compiled By:

The IDEAS Generation (formerly Inclusion Nextwork)

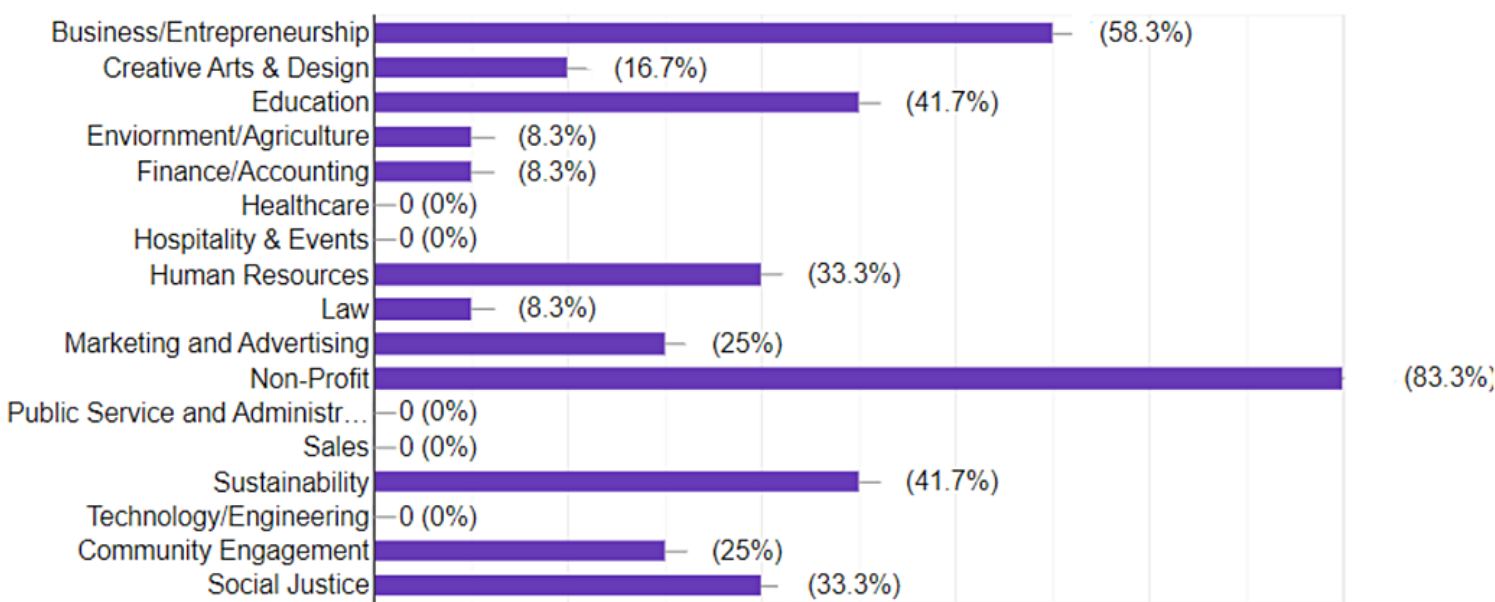
- Sage Drennon (they/he/she) - Project Lead & IDEAS Strategist
- Desi Carson (she/her) - IDEAS Development Partner
- Lore Espinoza Guerrero (they/them) - IDEAS Practitioner and Official Translator and Interpreter



# The JEDI Strategic Planning Working Group

## Team Demographics

### Professional Background/Experience





## The JEDI Strategic Planning Working Group

### Team Demographics

Gender Identity	Women: 61.5%, Men: 38.5%
Racial Identity	<p>African/African-American/Black (ex. Jamaican, Haitian, Nigerian, Ethiopian, Afro-Caribbean etc.): 30.8%</p> <p>Caucasian/White (ex. German, Irish, English, Italian, Polish, etc.): 46.2%</p> <p>Hispanic, Latino/a/x, or Spanish origin (ex. Mexican, Mexican American, Puerto Rican, Cuban, Colombian, etc.): 23.1%</p> <p>Indigenous (ex. Navajo Nation, Blackfeet Tribe, Mayan, Nome Eskimo Community, etc.): 7.7%</p>
Age	<p>25-34: 46.2%</p> <p>35-44: 38.5%</p> <p>45-54: 7.7%</p> <p>55-64: 7.7%</p>
Persons with a Disability	61.5%
Caregiver Status	30.7%
Civil Status	<p>Civil Partnership: 15.3%</p> <p>Married: 46.1%</p> <p>Single: 15.3%</p> <p>Spiritual or Cultural Union: 15.3%</p>
LGBTQIA+	38.5%
Native Language	<p>English: 92.3%</p> <p>Spanish: 23.1%</p>
Origin of Birth	<p>Europe: 7.7%</p> <p>North America: 7.7%</p> <p>United States: 84.6%</p>
Parental Status	Partnered parent or any legal guardian: 30.7%

# Methodology

## Strategic Meetings

- The JEDI Strategic Planning Working Group met 10 times over the course of six months in 2021 and early 2022 to finalize and discuss the plan. The following objectives were accomplished throughout the course of the six-month engagement:
  - Identifying which strategic planning model to follow
    - We opted for a Priority-Based Framework which allowed us to focus on the three JEDI pillars already identified by B Lab, as the other models would have required taking steps backward to gather data and input that was already solicited to create the pillars.
  - Determining the length and timeline for the JEDI Strategic Plan itself
  - Conducting a Root Cause Analysis for all three JEDI Pillars
  - Developing a Strategy Screen
  - Finalizing the Strategic Plan

## Survey

- In an effort to receive input and feedback from as many stakeholders as possible, a strategic survey was administered to staff and stakeholders to gather insights regarding the strategic solutions. The feedback was analyzed by the IDEAS Generation team to determine which strategic solutions were most important and salient for staff and stakeholders. The results were then utilized to create the final implementation schedule and timeline.

## Limitations

- The JEDI Strategic Planning survey was made available between 12/1/21 - 12/28/21 and was completed by over 100 participants. Of that group, about one-third were responses from BLG (B Lab Group) Members while the others were from stakeholders in the B Lab Network. Participants were asked a series of questions related to components of the proposed strategic plan where they ranked each component as “Favorable”, “Neutral”, or “Unfavorable”. The “Percentage Score” reflects the percentage of “Favorable” responses for each given question and those “Percentage Scores” were then analyzed accordingly. Given that not all that were sent the survey participated, there are limitations in our data gathering and sampling.

# Methodology

Overall, the entire JEDI strategic planning options received favorable percentage marks from both BLG and the Network with each component ranking above 70% except for one area: the BLG ranking of Pillar Two (Distributing Leadership & Shifting Power), which came in at 66%. Of particular note for methodology, the Network voted 12% less favorably about the survey being used to garner feedback than from the BLG group so the team may want to consider using a different feedback mechanism for the Network than the survey in the future.

For Pillar One (Racial Equity & Justice), two clear standouts emerged from the survey as priorities with highly favorable votes from both groups. The first was "Create a clear framework for JEDI competency" with 91% favorable from BLG and 90% favorable from the Network. The second was a "Framework of JEDI principles/solutions applied in decision-making processes and enforced through policy" with 89% favorable from BLG and 81% favorable from the Network. These two priorities stand out as areas to start with the work on Pillar One but it is also important to note where the voting trends differed and how they may impact future priorities. For example, the Network voted 86% in favor of "Create an Impact Data Assessment process to measure and track the outcomes of our existing programs." while BLG voted only 71% favorably. Also, the Network voted with 62% in favor a Resource Library while BLG only voted 51%. On the other hand, BLG voted with 91% favorable for "Evaluation and analysis through an anti-racism lens on leadership policies and practices" while the Network voted only 73% favorably. Using this comparative data, IDEAS Generation would recommend balancing these later priorities by working on one initiative with more Network favor while simultaneously working on one with more BLG favor in order to satisfy all relevant stakeholders.

For Pillar Two (Shifting Power & Distributing Leadership), the standout priority with the most favorable votes and the most alignment across groups was "Evaluating board structures to determine if a rotating seat or other form of inclusion in practice can support diversifying voices/experiences on the board" with 76% and 84% favorability scores from BLG and the Network respectively. Secondly, "Begin to develop external stakeholder guidelines that support B Lab team members with managing diverse stakeholder relationships" followed closely behind with 74% in favor from BLG and 75% in favor from the Network. As the only two priorities that clearly mention diversifying perspectives and voices, this shows that diversity itself is a significant priority for both BLG and the Network. We see this alignment of prioritization indicative of shared expectations across stakeholder groups for actions to be taken towards diversification.

91%

favor from BLG and

90%

favor from Network for

**"Create a clear framework  
for JEDI competency"**

76%

favor from BLG and

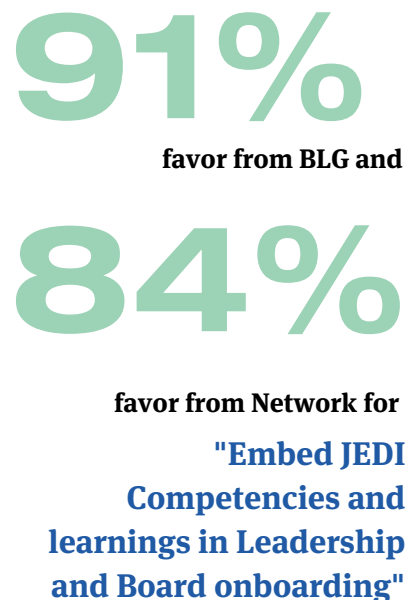
84%

favor from Network for

**"Evaluating board structures to determine if  
a rotating seat or other form of inclusion in  
practice can support diversifying voices &  
experiences on the board"**

# Methodology

For Pillar Three (Accountability), the standout priority with the most favorable votes and the most alignment across groups was “Embed JEDI competencies and learnings in Leadership and Board onboarding” with 91% favor from BLG and 84% favor from the Network. This finding implies that both groups believe that accountability can be best upheld from the very beginning by properly equipping Leadership with the necessary knowledge at the onset of their tenure. By setting an example early and with B Lab's most visible leaders, healthy accountability can ripple out from leadership to a broader network of internal and external stakeholders. Secondly, “Develop curriculum and begin training staff on what accountability is and isn't” received high marks with 74% favor from BLG and 77% favor from the Network. Although this result yielded the same average percentage between the groups (75.5%) as another priority “Creating an accountability framework for Board Members to hold CE/LEs accountable and vice versa”, the latter priority did not have the same voting alignment as the former. Alignment in voting patterns suggests that curriculum and training related initiatives will be received favorably by stakeholders across groups.



After averaging the favorable vote percentages from each group, the final results for each priority are summarized below:

- **Pillar One: Racial Equity & Justice**
  - (90.5%) Create a clear framework for JEDI competency.
  - (85.0%) Framework of JEDI principles/solutions applied in decision-making processes and enforced through policy.
  - (82.0%) Evaluation and analysis through an anti-racism lens on leadership policies and practices.
  - (78.5%) Create an Impact Data Assessment process to measure and track the outcomes of our existing programs.
  - (72.5%) Create a Global JEDI group consisting of JEDI partners cross the globe and networks.
  - (71.5%) Continue to push for retrospectives and ways of becoming an intentional learning organization.
  - (56.5%) Resource Library that grows as we grow. This could be something that is seen as an added value to the certification. And can be a revenue stream from non-B's or pending B's who'd like to pay for access.
  - (48.0%) Lead assessment and analysis of team members current experience with technology at B Lab to surface any barriers to accessibility/usage.

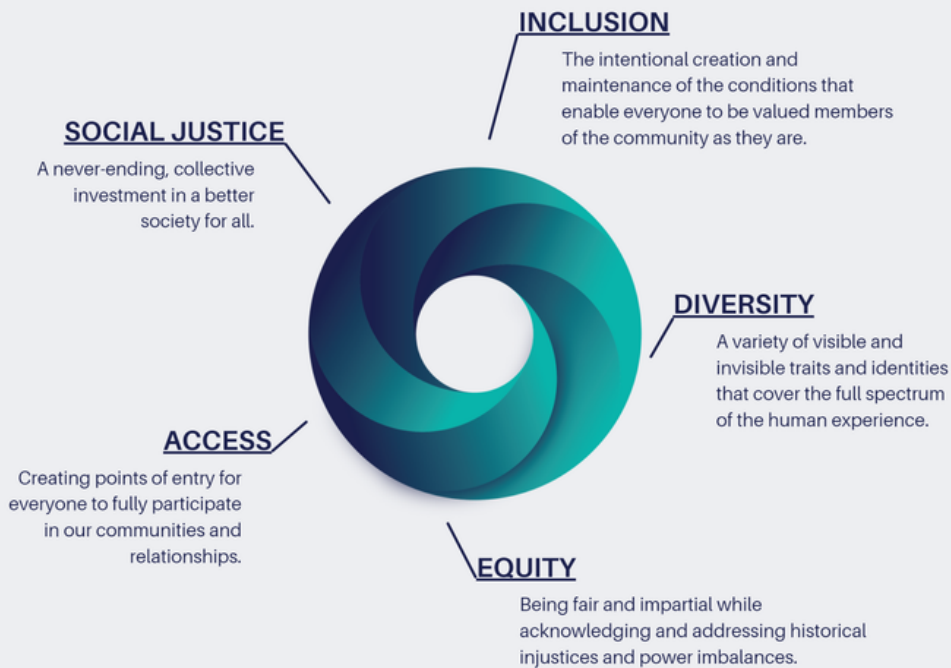
# Methodology

- Pillar Two: Shifting Power & Distributing Leadership
  - (80.0%) Evaluating board structures to determine if a rotating seat or other form of inclusion in practice can support diversifying voices/experiences on the board.
  - (74.5%) Begin to develop external stakeholder guidelines that support B Lab team members with managing diverse stakeholder relationships. Specifically focused on how to engage with a stakeholder who may not be in alignment with JEDI values.
  - (68.5%) Create an equitable analyses guideline for the org. A guideline to help direct individual or group work through how to analyze data with an equitable lens.
  - (64.5%) Doing an audit or review of the personnel practices within the C&V team in order to engage with those most affected and propose changes based on their real needs.
  - (64.5%) Create a framework for what a "global" team actually is in practice (e.g., should each team in global have certain kinds of representation from different regions).
  - (64.0%) Framework of expectations and what teams are involved in working groups (e.g., C&V, programs, etc).
- Pillar Three: Accountability
  - (87.5%) Embed JEDI competencies and learnings in Leadership and Board onboarding.
  - (75.5%) Develop curriculum and begin training staff on what accountability is and isn't.
  - (75.5%) Creating an accountability framework for Board Members to hold CE/LEs accountable and vice versa.
  - (74.0%) Create specific goals to each team/project around JEDI as a way of having formal measurement around accountability.
  - (69.0%) Define Accountability for the organization and the network. Create some training series with outside consultant (selected by B Lab's JEDI Team) to support accountability understanding.
  - (64.5%) Build in accountability framework/lifecycle into performance process.
  - (64.0%) Building JEDI & accountability into retrospectives. Create a framework for teams to follow.
  - (63.0%) JEDI team involved in any future narrative shifts and employer branding projects, including those underway.

These results were then utilized to create the final implementation schedule and timeline.

# Methodology

## OUR IDEAS FRAMEWORK:



At IDEAS Generation, we utilize the above IDEAS Framework as our guidepost and our lens through which we conduct all of our work and assessments. We believe that each component of the framework is connected to the others to form a well-rounded, human-centered perspective from which our recommendations are made.

In an effort to meet the highest standards of access during the dissemination of this report, we have provided written and audio translations into multiple languages as well as providing a grayscale alternative version. You may click the speaker symbol for the audio version or click on the language name for the written version. If there is more that we can do to make this report accessible for you, please don't hesitate to reach out to our IDEAS Generation team.

 [Spanish](#)  [Portuguese](#)  [Italian](#)  [French](#)  [English](#) [\(grayscale\)](#)



# Theory of Change

These strategies and the TOC are extensions of B Lab's ongoing work to redefine the role of business as a force for good. This work will be used to guide Global Partners in applying the TOC on a regional level and possibly developing their own goals and strategies in alignment with the global TOC framework.

You can find the Global Theory of Change below, linked [here](#), and find more detail about the Theory of Change in this explainer [video](#).

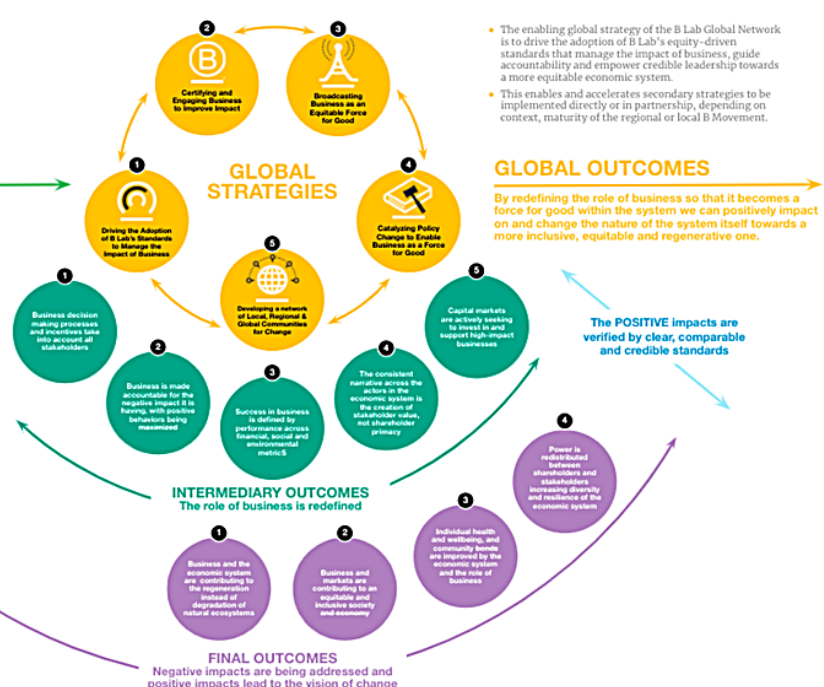
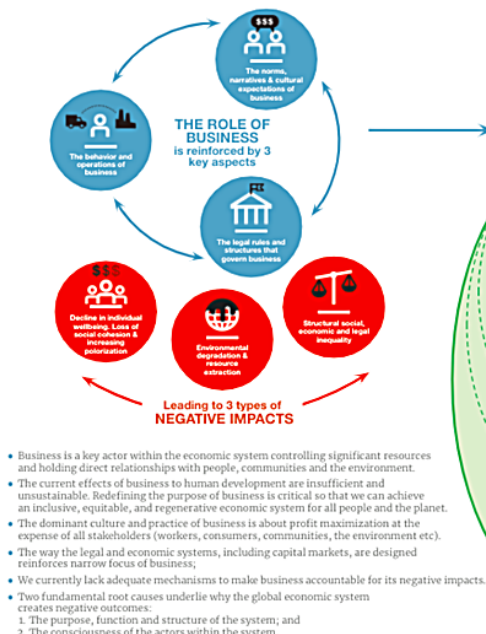
## Theory of Change for the Global Network

An inclusive, equitable and regenerative economic system for all people and the Planet.



### PROBLEM

Current economic system, driven by business as one of its key actors, is creating significant negative impacts, and not meeting its potential to create positive impact across society and the environment.





# **JEDI Baseline Pillars of Focus: Racial Equity & Justice**


Angela Glover Blackwell, the founder of PolicyLink, defines Racial equity as just and fair inclusion into a society in which all people, immaterial of their race or ethnicity, can participate, prosper, and reach their full potential. Racial inequity is largely perpetuated by structural racism. Structural racism refers to historical and ongoing political, cultural, social, and economic policies and practices that systematically disadvantage people of color.

## **Racial Equity is all-inclusive.**

Racial intersectionality exists in every aspect of human interaction. There are no other forms of equity focus that encompass all others except racial equity.

For example: every human who exists with a disability has a race - whether known, unknown, or assumed - whereas everyone who exists within or across races does not necessarily have a disability.

## **Questions that drive Racial Equity & Justice**

1. Have you established who is your most racially minoritized? (For the field, community, participants, stakeholder groups etc.)
  2. What assumptions have you made? Are you qualified to have made this assumption? Why have you made it? Is your perspective broad enough?
  3. Who may not be able to access this information or program and have you addressed this in your planning?
  4. Have you asked “why” at least once during your process?
  5. Have you decided to do something different this time or committed to do so next time? What are your accountability measures?
- 





# **JEDI Baseline Pillars of Focus:**

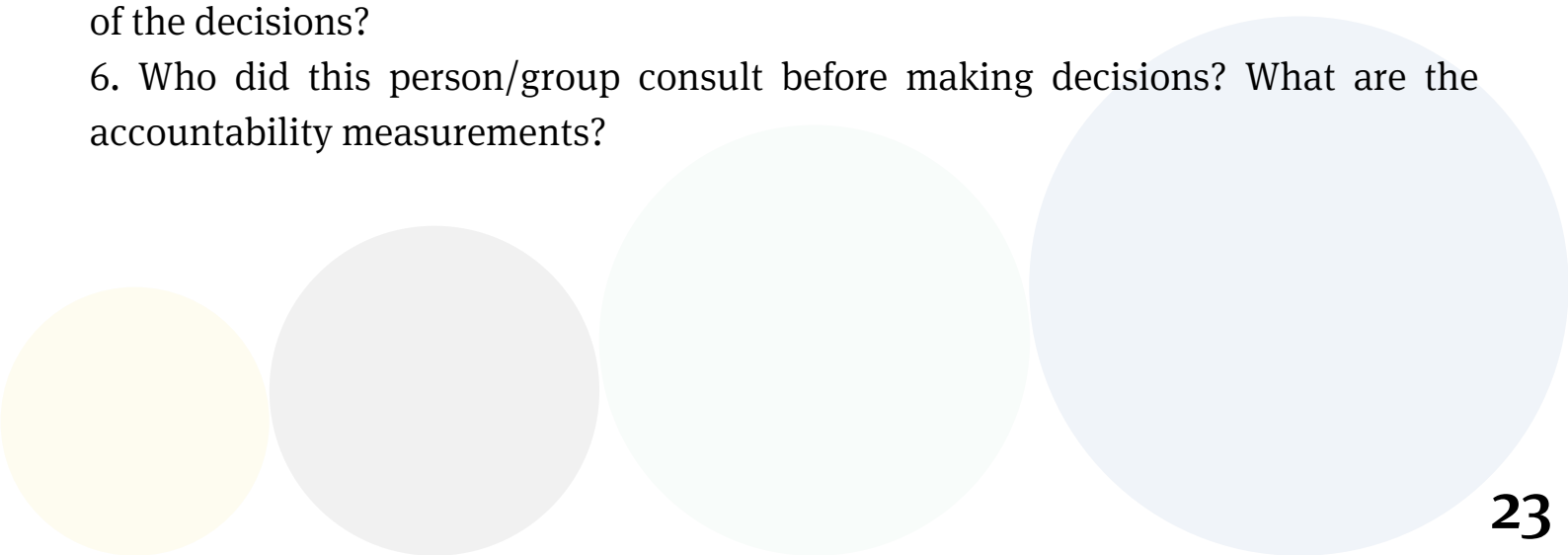
## **Shifting Leadership & the Power of Influence**

Distribution of power can be achieved when each decision is made in conjunction with the group affected by the consequences of that decision. There are times when a group who is affected by a consequence does not have the power, privilege or opportunity to make a decision - this is when B Lab either:

- Shift the power so that the group can decide or,
- Provide space for the group to candidly and transparency influence the decision

### **Questions to consider that promote Shifting Power & Distributing Leadership**

1. Who's comfort has been centered?
2. How many decisions does this person/group have the privilege or opportunity of making? How often?
3. Does this person/group make decisions because of title or hierarchy? Did you ask why?
4. Are the people making the decision the closest to the work?
5. Do they belong to the group who could be adversely impacted by the outcomes of the decisions?
6. Who did this person/group consult before making decisions? What are the accountability measurements?





# **JEDI Baseline Pillars of Focus: Accountability**

Accountability is when an individual or department experiences consequences for their performance or actions - or lack thereof.

Accountability is essential for an organization and for a society. Without it, it is difficult to get people to assume ownership of their own actions because they believe they will not face any consequences.

## **Questions that drive Accountability**

1. What is our shared goal?
2. What is our ultimate purpose behind setting this goal/these goals?
3. What is our definition of success?
4. What are our deliverables?
5. What am I personally responsible for?
6. What do I need to accomplish my personal tasks?
7. How will I respond when things go off-course? Who will I tell?

# Pillar One:

## Racial Equity & Justice

The following tables provide the causations that were surfaced in the JEDI Strategic Planning meetings and discussions. Utilizing the question, "what is keeping B Lab from actualizing its JEDI Pillars," the team worked diligently to unearth what may be at the root of the barriers B Lab currently faces and how the organization might consider making changes to those root challenges.

Bucket	Causation	Solutions & Key Results (KR)
Measurement	<ul style="list-style-type: none"> <li>Currently, we do not track the impact of our work on Black, or Indigenous businesses or businesses owned by groups who are regionally marginalized that are potential B Corps</li> <li>Lack of comprehensive data on the impacts of BLG's programs and offerings, including businesses' use of the B Impact Assessment, on Black, Indigenous, and other regionally marginalized populations</li> <li>Lack of a performance evaluation and feedback tool to assess managers/leaders through a JEDI lens</li> <li>Lack of common understanding of JEDI principles, challenges, and opportunities across global regions.</li> <li>Lack of a system to track JEDI knowledge and competencies for managers and staff</li> <li>Lack of measurable intermediate and long-term outcomes for the Theory of Change including those related to JEDI outcomes</li> </ul>	<ul style="list-style-type: none"> <li>Create a clear framework for JEDI competencies for leaders, managers, and staff               <ul style="list-style-type: none"> <li>KR: Feedback &amp; evaluation tools measure the JEDI competencies and performance of leaders, managers, and staff and support accountability towards the same</li> </ul> </li> <li>Partner with BLG Insights team to identify data points to measure and track the outcomes of our existing programs on populations who are regionally marginalized               <ul style="list-style-type: none"> <li>KR: BLG tracks and measures the impact of our programs, with a specific eye towards JEDI objectives (inclusive, equitable, regenerative economic system) in order to identify gaps that can be addressed to better support regionally marginalized groups</li> </ul> </li> </ul>
People	<ul style="list-style-type: none"> <li>Lack of representation and diverse identities at the Board and Leadership levels.</li> <li>BLG leadership &amp; governance predominantly US-centric, white or white presenting, male or masculine-presenting</li> <li>Lack of engagement with potential job applicants who are from regionally marginalized groups outside of the USA</li> <li>Low representation of Black, Indigenous people or people identified in groups who are regionally marginalized in different regional communities and customer bases</li> <li>Global Partners are in different stages of development in terms of their internal capacity and JEDI competencies</li> </ul>	<ul style="list-style-type: none"> <li>Create a Global JEDI group with representation from across the Global Network               <ul style="list-style-type: none"> <li>KR: Global JEDI group meets and discusses JEDI-related questions and concerns and supports B Lab Global to ensure JEDI work accurately reflects the needs of the Global Network</li> </ul> </li> <li>Evaluation and analysis through an anti-racism lens on leadership policies and practices               <ul style="list-style-type: none"> <li>KR: Recommendations for improvement to leadership policies and practices that are in line with anti-racism practices</li> </ul> </li> </ul>

# Pillar One:

## Racial Equity & Justice

Bucket	Causation	Solutions & Key Results (KR)
Mission	<ul style="list-style-type: none"> <li>Disconnect between B Lab's principles and values and how they are embodied by B Lab's leadership and staff</li> <li>Tensions in B Lab's business model between the need to build financial sustainability and the accessibility of products and programs, which in turn puts pressure on internal systems</li> <li>Challenges related to philanthropy, include the problematic origin of funds, the prescriptive nature of grants, and lack of representation in both large institutional and high net worth individual donors. JEDI principles are seen as a "lens" or a "layer" of the work that is done by B Lab but are not seen as a core element of B Lab's mission and purpose</li> <li>Lack of clarity whether JEDI principles are internal, external (in line with B Lab's mission), or both</li> <li>Lack of a globally coordinated process to apply JEDI to global programs</li> </ul>	<ul style="list-style-type: none"> <li>Formalized framework to embed JEDI principles into decision-making process               <ul style="list-style-type: none"> <li>KR: JEDI framework is applied in decision-making processes and enforced through policy</li> </ul> </li> </ul>
Machines	<ul style="list-style-type: none"> <li>Lack consistent &amp; transparent processes for translating B Lab's tools</li> <li>B Lab's tech products assume a user with a medium-to-high level of digital skills and tech hardware access</li> </ul>	<ul style="list-style-type: none"> <li>Lead assessment of team members' current experience with technology at B Lab to surface barriers to accessibility/usage               <ul style="list-style-type: none"> <li>KR: Prioritized list of solutions to improve technology accessibility</li> </ul> </li> </ul>
Methods	<ul style="list-style-type: none"> <li>Rapid pace makes it difficult to enforce the practice of learning from missteps through retrospectives</li> </ul>	<ul style="list-style-type: none"> <li>Develop accountability mechanisms or leading retrospectives for projects &amp; processes               <ul style="list-style-type: none"> <li>KR: Use of retrospectives supports intentional, continuous learning</li> </ul> </li> </ul>
Materials	<ul style="list-style-type: none"> <li>Staff &amp; managers lack sufficient bandwidth to adequately learn &amp; adopt JEDI-forward ways of working</li> <li>Lack of knowledge management capacity makes it difficult for staff to find information and/or access resources</li> <li>Staff needs continuous and purpose-driven exposure to JEDI information</li> <li>Managers need for JEDI onboarding processes and projects</li> <li>B Impact Assessment language is not inclusive and has limitations in how effectively it supports companies to measure their JEDI work</li> </ul>	<ul style="list-style-type: none"> <li>Develop a resource library that supports deeper learning and understanding of JEDI competencies and practices. Resource Library that grows as we grow. This could be something that is seen as an added value to the certification. And can be a revenue stream from non-B's or pending B's who'd like to pay for access               <ul style="list-style-type: none"> <li>KR: JEDI Resource Library provides access to information and training on JEDI topics for staff and for external stakeholders (B Corps BIA users, etc.)</li> </ul> </li> </ul>

# Pillar Two:

## Shifting the Power of Influence and Distributing Leadership

Bucket	Causation	Solutions & Key Results (KR)
Measurement	<ul style="list-style-type: none"> <li>Insufficient measure of the impact of leaders' decisions on stakeholders, making it difficult to create a sense of accountability</li> </ul>	<ul style="list-style-type: none"> <li>This will be addressed through the accountability solutions</li> </ul>
People	<ul style="list-style-type: none"> <li>Lack of sufficient training and support to enable staff at all levels to make decisions in their scope</li> <li>Formalize and share out on Board growth and development plan including term limits.</li> <li>Tendency to seek consensus and inadequate use of practices which foster equitable participation/voice from different individuals, leading some to have disproportionate influence in decision-making</li> <li>Large number of legacy leadership positions (Note: this is shifting)</li> </ul>	<ul style="list-style-type: none"> <li>Review practices and policies to identify issues that prevent equitable participation, voice, and decision making               <ul style="list-style-type: none"> <li>KR: Prioritized list of proposed updates to practice and policies</li> </ul> </li> <li>Create a common framework for building a high-impact, "global" team               <ul style="list-style-type: none"> <li>KR: Managers and leaders have guidance for building teams with global representation and fostering practices that enable global voice</li> </ul> </li> <li>Evaluate board structures and policies for inclusivity and identify missing perspectives &amp; voices               <ul style="list-style-type: none"> <li>KR: Proposal to expand representation on the Board of Directors and evolve policies &amp; practices for inclusivity</li> </ul> </li> </ul>
Mission	<ul style="list-style-type: none"> <li>Lack of a clear definition of "Global" and tendency to default to US and/or Western-centric ideas, proposals, and programs. Tensions between what should be centralized, decentralized, and coordinated strategies across the Global Network</li> <li>B Lab's mission is based on the premise of foreseeing needs and building on future needs rather than responding to current needs</li> </ul>	<ul style="list-style-type: none"> <li>These causations will be addressed through the Global JEDI group proposed in the solutions for Pillar 1 – Racial Equity and Justice</li> </ul>

# Pillar Two:

## Shifting the Power of Influence and Distributing Leadership

Bucket	Causation	Solutions & Key Results (KR)
Machines	<ul style="list-style-type: none"> <li>Technology platforms are usually first developed in English and often lack multiple language access</li> <li>Technology platforms are not always accessible for people across ability levels</li> </ul>	<ul style="list-style-type: none"> <li>These causations will be addressed through the assessment and analysis of team members current experience with technology at B Lab to surface any barriers to accessibility/usage proposed for Pillar 1 – Racial Equity and Justice</li> </ul>
Methods	<ul style="list-style-type: none"> <li>Dominant or majority voices disproportionately inform decisions over minority or quieter voices, including in data analysis (e.g. making decisions based on overall results vs. impacts on disproportionately affected or marginalized groups)</li> <li>Lack of standards/ recommendations and/or implicit bias leads to tasks being assigned based on sexist, racist, or other biased reasons</li> <li>Lack of clarity about who is closest to the work (i.e. “owns” the work) and decision-making accountability</li> <li>Lack of policies or clear communication about existing policies that enable people to make decisions in different contexts</li> </ul>	<ul style="list-style-type: none"> <li>Create an analysis guideline to help individuals and groups equitably analyze data               <ul style="list-style-type: none"> <li>KR: Leaders, managers, and staff can assess quantitative and qualitative data/information to make decisions that account for the impacts of those decisions on different groups</li> </ul> </li> <li>Develop guidelines for managing diverse stakeholder relationships, including how to engage with those not aligned with JEDI values               <ul style="list-style-type: none"> <li>KR: Leaders, managers, and staff have tools to manage diverse groups of external and internal stakeholders</li> </ul> </li> </ul>
Materials	<ul style="list-style-type: none"> <li>Lack specific and established decision-making processes and transparency across the different levels of the organization</li> <li>Lack of knowledge management systems &amp; standard operating procedures to track what decisions have been made and share information with future decision-makers, etc.</li> </ul>	<ul style="list-style-type: none"> <li>This will be addressed through the solutions proposed in accountability</li> </ul>

# Pillar Three:

## Accountability

Bucket	Causation	Solutions & Key Results (KR)
Measurement	<ul style="list-style-type: none"> <li>Lack of a definition of accountability (often seen as punishment)</li> <li>Lack consistent and clear understanding of the outcomes individuals are being held accountable to and how those are measured</li> </ul>	<ul style="list-style-type: none"> <li>Define Accountability for the organization and the network and support understanding and adoption through training               <ul style="list-style-type: none"> <li>KR: Leaders, managers, and staff understand and drive a culture of accountability with clear results/outcomes</li> </ul> </li> <li>Create JEDI-specific goals for teams/projects.               <ul style="list-style-type: none"> <li>KR: Individuals and teams can build JEDI goals into projects and team-based work</li> </ul> </li> </ul>
People	<ul style="list-style-type: none"> <li>Inconsistent application of JEDI pillars in hiring &amp; onboarding</li> <li>Lack of accountability mechanisms for senior leadership to uphold the JEDI pillars</li> <li>Lack of connectivity between B Lab's JEDI Pillars, organizational strategy, and governance &amp; leadership practices</li> <li>B Lab's desired culture of open communication does not always extend to accountability</li> <li>Accountability mechanisms are not applied in an equitable manner (i.e. systems can be circumvented and/or ignored, by those in positions of power)</li> </ul>	<ul style="list-style-type: none"> <li>Embed JEDI competencies and learnings in Leadership and Board onboarding               <ul style="list-style-type: none"> <li>KR: Board and Leadership have the training and tools to practice and drive accountability for B Lab's JEDI Pillars</li> </ul> </li> </ul>
Mission	<ul style="list-style-type: none"> <li>Lack of clarity of what the word "good" in the mission of "business as a force for good" means</li> <li>Perceived or real lack of internal accountability may lessen the credibility of the organization and devalue the certification process and standards</li> </ul>	<ul style="list-style-type: none"> <li>Develop a true and consistent narrative inside B Lab around accountability and ensure that it is communicated clearly in our external narrative               <ul style="list-style-type: none"> <li>KR: Internal audit and tracking of narrative shifts and employer branding projects</li> </ul> </li> </ul>

# Pillar Three:

## Accountability

Bucket	Causation	Solutions & Key Results (KR)
Machines	<ul style="list-style-type: none"> <li>Lack of transparency and communication of department and senior leaders' accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>This will be addressed through future strategic planning</li> </ul>
Methods	<ul style="list-style-type: none"> <li>Lack of policies or clear communication about policies that enable people to make decisions in different contexts</li> <li>Pace of processes and projects leaves little room to track accountability and measure impact.</li> <li>Need for proactive transparency as a proxy for outcomes-based accountability</li> <li>Inconsistent application of retrospectives means that accountability is not measured or enforced consistently</li> <li>Lack of clarity about who is closest to the work (i.e. "own"ership of the work) and where the decision-making accountability falls</li> </ul>	<ul style="list-style-type: none"> <li>Build an accountability framework/lifecycle into the performance process               <ul style="list-style-type: none"> <li>KR: Leaders and managers have tools for ensuring accountability through performance evaluations</li> </ul> </li> <li>Build JEDI &amp; accountability measures into retrospectives               <ul style="list-style-type: none"> <li>KR: Teams consistently use retrospectives for learning and to evaluate how the project or process supported JEDI objectives and accountability</li> </ul> </li> </ul>
Materials	<ul style="list-style-type: none"> <li>Lack of training on accountability practices</li> </ul>	<ul style="list-style-type: none"> <li>Create accountability framework for Board Members to hold CEO/Lead Executives accountable and vice versa               <ul style="list-style-type: none"> <li>KR: Clear and transparent accountability of the CEO/Lead Executive to B Lab's strategies and JEDI Pillars</li> </ul> </li> </ul>





# Measurement Strategies

Strategy	Measurement
<ul style="list-style-type: none"> <li>Create a clear framework for JEDI competency.</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate team member performance before implementing competencies and continuously evaluate at ongoing performance evaluations for improvements/growth in competency areas.</li> </ul>
<ul style="list-style-type: none"> <li>Create an Impact Data Assessment process to measure and track the outcomes of our existing programs. This can also be used to engage with how language has an impact on the availability of global data.</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate outcome data to ensure that existing programs are producing intended JEDI outcomes and adjust programming as needed.</li> </ul>
<ul style="list-style-type: none"> <li>Create a Global JEDI group consisting of JEDI partners across the globe and networks.</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing meeting of JEDI group inclusive of measuring impacts of any new or adjusted programming as suggested by the group.</li> </ul>
<ul style="list-style-type: none"> <li>Evaluation and analysis through an anti-racism lens on leadership policies and practices.</li> </ul>	<ul style="list-style-type: none"> <li>Annual cultural assessment to evaluate success of new policies and practices.</li> </ul>
<ul style="list-style-type: none"> <li>Framework of JEDI principles/solutions applied in decision-making processes and enforced through policy.</li> </ul>	<ul style="list-style-type: none"> <li>Evaluation of how the JEDI framework is being implemented in decision making and analysis of policy enforcement through performance management evaluations.</li> </ul>
<ul style="list-style-type: none"> <li>Lead assessment and analysis of team members current experience with technology at B Lab to surface any barriers to accessibility/usage.</li> </ul>	<ul style="list-style-type: none"> <li>Implement updated accessibility tools for technology and gather team member feedback regarding updated technology.</li> </ul>
<ul style="list-style-type: none"> <li>Continue to push for retrospectives and ways of becoming an intentional, continuous learning organization.</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate ongoing accountability mechanisms to gather outcomes data regarding implementation of retrospectives.</li> </ul>
<ul style="list-style-type: none"> <li>Resource Library that grows as we grow. This could be something that is seen as an added value to the certification. And can be a revenue stream from non-B's or pending B's who'd like to pay for access.</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate how often team members are utilizing the resource library and create a feedback mechanism for the resource library to ensure that it grows as B Lab Global grows.</li> </ul>
<ul style="list-style-type: none"> <li>Doing an audit or review of the personnel practices within the C&amp;V team in order to engage with those most affected and propose changes based on their real needs.</li> </ul>	<ul style="list-style-type: none"> <li>Analysis of C&amp;V personnel practices data to determine new policies/programming/initiatives to engage to better support C&amp;V team.</li> </ul>
<ul style="list-style-type: none"> <li>Create a framework for what a "global" team actually is in practice (e.g., should each team in global have certain kinds of representation from different regions).</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate how successful global teams are in addressing global challenges after using the developed framework.</li> </ul>



# Measurement Strategies

Strategy	Measurement
<ul style="list-style-type: none"> <li>Framework of expectations and what teams are involved in working groups (e.g., C&amp;V, programs, etc).</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate outcomes of the working groups after utilizing the framework with data of the working groups before using the framework.</li> </ul>
<ul style="list-style-type: none"> <li>Evaluating board structures to determine if a rotating seat or other form of inclusion in practice can support diversifying voices/experiences on the board.</li> </ul>	<ul style="list-style-type: none"> <li>Analysis of the board matrix and identification of gaps that may exist in representation on the board.</li> </ul>
<ul style="list-style-type: none"> <li>Create an equitable analyses guideline for the org. A guideline to help direct individual or group work through how to analyze data with an equitable lens.</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate new data that emerges after using the guideline to determine its success and viability.</li> </ul>
<ul style="list-style-type: none"> <li>Begin to develop external stakeholder guidelines that support B Lab team members with managing diverse stakeholder relationships. Specifically focused on how to engage with a stakeholder who may not be in alignment with JEDI values.</li> </ul>	<ul style="list-style-type: none"> <li>Engage staff periodically to determine if guidelines are achieving high impact practices.</li> </ul>
<ul style="list-style-type: none"> <li>Define Accountability for the organization and the network. Create training series with outside consultants (selected by B Lab's JEDI Team) to support accountability understanding.</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate how team members orientations have changed to accountability after the development of the definition and attendance of the accountability training.</li> </ul>
<ul style="list-style-type: none"> <li>Create specific goals to each team/project around JEDI as a way of having formal measurement around accountability.</li> </ul>	<ul style="list-style-type: none"> <li>Team members compile a list of their JEDI goals and outcomes for their teams/projects for their end of year performance evaluation.</li> </ul>
<ul style="list-style-type: none"> <li>Embed JEDI competencies and learnings in Leadership and Board onboarding.</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate team members throughout the course of their onboarding to ensure learning and development have been achieved.</li> </ul>
<ul style="list-style-type: none"> <li>JEDI team involved in any future narrative shifts and employer branding projects, including those already underway.</li> </ul>	<ul style="list-style-type: none"> <li>A JEDI lens is included in all narrative shifts and employer branding projects.</li> </ul>
<ul style="list-style-type: none"> <li>Build an accountability framework/lifecycle into the performance process.</li> </ul>	<ul style="list-style-type: none"> <li>Team members are evaluated during their performance evaluation process how well they have engaged in the accountability practices set for by B Lab Global.</li> </ul>
<ul style="list-style-type: none"> <li>Building JEDI &amp; accountability into retrospectives. Create a framework for teams to follow.</li> <li>Creating an accountability framework for Board Members to hold CEO/Lead Executives accountable and vice versa.</li> </ul>	<ul style="list-style-type: none"> <li>Team members submit their retrospectives after completion of projects.</li> <li>The board members and CE/LEs utilize this framework in their day to day operations.</li> </ul>

# Strategy Screen

	Option A	Option B	Option C	Option D
<b>We will undertake strategies that answer:</b>				
Does this strategy align with the 3 JEDI Pillars? <ul style="list-style-type: none"> <li>Racial Equity &amp; Justice</li> <li>Shifting Power &amp; Redistributing Leadership</li> <li>Accountability</li> </ul>				
Does this strategy advance the Global vision? <ul style="list-style-type: none"> <li>Does this strategy advance the outcomes defined by the Global Theory of Change?</li> </ul>				
Does this strategy move us towards the JEDI strategic goals? (Or does it distract us?)				
Do we have appropriate resources (finance, personnel, etc.) to gather feedback and input from those we believe are "most impacted" before and after using this strategy?				
Do we have appropriate resources (finance, personnel, etc.) to gather feedback and input from those we believe are "most impacted" before and after using this strategy?				
Do we have the resources needed to implement this strategy and measure its impact? (Finances, Time, People, Technology, etc.)				
Is this strategy relevant and accessible to all of its intended audiences? <ul style="list-style-type: none"> <li>Is it designed in a way that a distributed group of individuals can apply it to their work?</li> </ul>				
Does this strategy have buy-in from the appropriate stakeholders?				
Does leadership endorse and understand how this strategy will be implemented?				

The above strategic screen is meant to be a guide. The implementation, use, and scoring of this screen are determined through the JEDI team.

# Implementation Recommendations & Timeline

The intent of this plan is to establish the next steps to further embed JEDI into the foundation of B Lab Global within the next three years. B Lab will utilize this plan in subsequent years to build future JEDI strategic plans. Each strategy within this Strategic Plan is accompanied by Key Results (KR) and Measurements that point toward the future.

In the beginning stages of the strategic planning process, we administered a Root Cause Analysis of each of the three JEDI pillars. This process allowed us to simultaneously discuss what strategies would need to be implemented and when. Given the three-year length of the plan, the recommendation is to utilize the included framework and timeline to ensure goals are being met.

In addition to the implementation timeline, the following 3-part framework provides a structured approach to embedding and engaging strategic solutions over the next three years.



A three-part framework is recommended as a guide for implementing solutions of the JEDI strategic plan over the next three years. As solutions are rolled out, utilizing this three-step framework to identify, build, and implement solutions will help to ensure a holistic and equitable approach to embedding solutions into B Lab Global.

