SHERPA SUSTAINABILITY INSTITUTE

CISR®

Continual Improvement *for* Social Responsibility

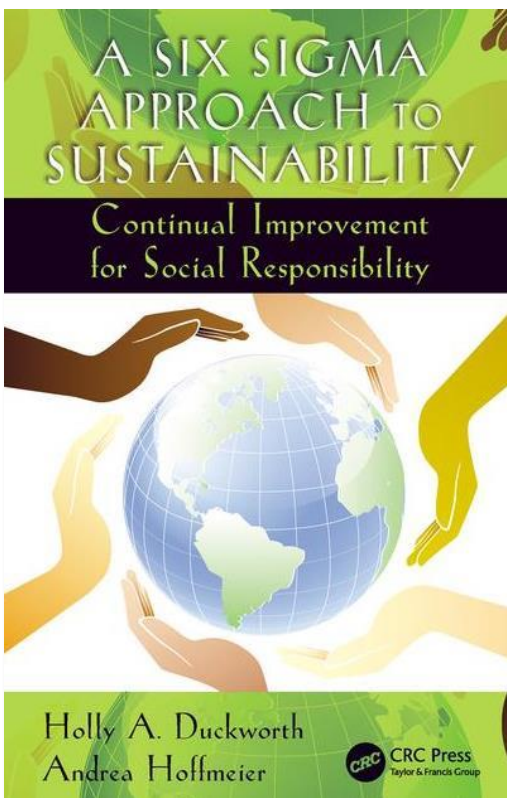# COURSES

APRIL 2017 EDITION

CISR® Methodology & SOFAIR Method

CISR®
Continual Improvement
for Social Responsibility

Organizations across the globe are recognizing the benefits of, and expectations to operate in a more socially responsible way. *This breakthrough methodology connects Social Responsibility (SR) to Sustainability and organizational strategy and business objectives.*

About CISR® Methodology

Continual Improvement for Social Responsibility

CISR (sounds like scissor) is a rigorous methodology for improving SR Performance, *as a pathway to Sustainability*, similar to Six Sigma being a methodology for improving quality.

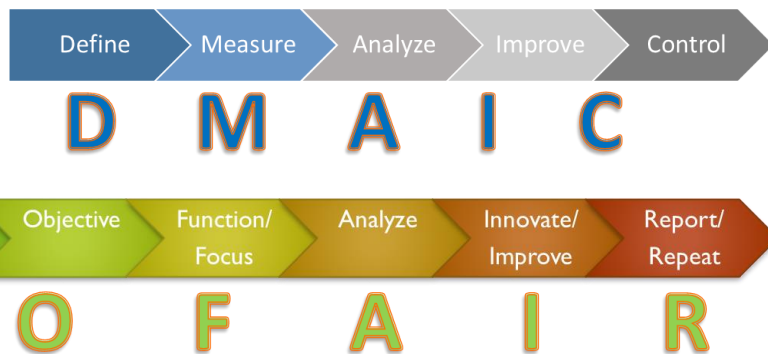**The textbook introduces the six-step SOFAIR Method for achieving sustainability through social responsibility.**

Just as **DMAIC** is a project-based improvement method within Six Sigma, **SOFAIR** is a process improvement within CISR® **DfSR**, Design for Social Responsibility, is similar to the **DfSS,** Design for Six Sigma Method.

The SOFAIR Method begins with Stakeholder Engagement & ISO 26000 Seven SR Subjects

Unlike other familiar standards, such as ISO 9000, ISO 26000 International Guidance for Social Responsibility has been published as guidance, and has *no certification. This has left many organizations with questions as to how to implement the standard.*

By using the disciplined CISR® methodology for implementing the ISO 26000 guidance, we are ushering in a new megatrend for Social Responsibility, the same way ISO 9000 and the Six Sigma DMAIC method did for Quality in the 1990's.

For the Quality Professional, understanding these seven Subjects thoroughly, and adapting well-worn Six Sigma tools makes the difference between superficial involvement versus whole-organization engagement in SR and Sustainability.
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A SIX SIGMA APPROACH TO SUSTAINABILITY
Continual Improvement for Social Responsibility
Holly A. Duckworth
Andrea Hoffmeier
CRC Press
Taylor & Francis Group

"In this complex world, it is refreshing to know that there is a coherent and instructive guide available to achieve long term success that can be used by any organization.
Everything that the organization, its members, and its external stakeholders need to ensure sustainable success can be found between the covers…"
—Robert B. Pojasek, PhD
Harvard University

ISO 26000
SOCIAL RESPONSIBILITY

- **Organizational Governance**
- **Human Rights**
- **Operating Practices**
- **Labor Practices**
- **Environment**
- **Consumer Issues**
- **Community Involvement and Development**

| Define | Measure | Analyze | Improve | Control |

D M A I C

| Stakeholders/ Subjects | Objective | Function/ Focus | Analyze | Innovate/ Improve | Report/ Repeat |

S O F A I R

CISR®
Continual Improvement
for Social Responsibility
OVERVIEW of COURSES & FEES

Visit SherpaSustainabilityInstitute.com for OPEN ENROLLMENT START DATES & REGISTRATION

Email *Info@SherpaSustainabilityInstitute.com* for Organizational Engagements – with closed group cohorts.

	COURSE / TUITION†	WEEKS / NOTES*
CERTIFIED CISR® PRACTITIONER	**CISR® Practitioner** $2950	**14 WEEKS + 1 WEEK SYNTHESIS: 7.4 CEUs** This is experiential learning…students learn the rigorous methodology of CISR® by DOING. Like Six Sigma programs, students learn by leading a team through the completion of a project. This online course includes 1:1 Coaching for certifying project completion. CISR Certified Practitioner Candidates log on at any time to view the recorded lectures, complete assignments, and interact with classmates, coaches and instructors. A comprehensive workbook of exercises and templates is provided weekly.
CISR® ADVOCATE	**CISR® Advocate** $995	**6 WEEKS: 2 CEUs** The Advocate Course is intended to provide Program Champions, Project Sponsors, and Key Team Members a high-level understanding of the SOFAIR Method. By understanding where Practitioner Candidates are in the SOFAIR Process, these stakeholders are able to support project success.
Stakeholder **E**ngagement **S**ystem	**SES Management & Development** $995	**6 WEEKS: 2 CEUs** Systems thinking is required to manage the inherent risks of Stakeholder Engagement. Learn skills to plan, prepare, implement, and improve engagement with your stakeholders using widely recognized global frameworks. An effective Stakeholder Engagement System creates proactive dialogue around disparate and conflicting points of view.
CERTIFIED CISR® EXPERT	**CISR® Expert** $3450	**14 WEEKS + 1 WEEK SYNTHESIS: 9 CEUs** CISR® Practitioner Certification is a prerequisite. More advanced tools and methods are explored in this experiential, project-based learning of expert-level SOFAIR Method. Advanced Stakeholder Engagement and Innovation (TRIZ) Tools are explored in-depth. Proven techniques for influencing behavioral change and advanced leadership methods are examined, with coaching throughout.

†FOR GROUP RATES EMAIL: Info@SherpaSustainabilityInstitute.com

*ALL COURSES REMAIN OPEN AND ACCESSIBLE FOR 6 MONTHS AFTER INSTRUCTION, ALLOWING PARTICIPANTS TO ACCESS TOOLS, TEMPLATES, RESOURCES, LECTURES AND VIEW ONGOING DISCUSSIONS, THROUGH PROJECT IMPLEMENTATION.

CISR® Continual Improvement for Social Responsibility

Certified Practitioner Syllabus

Earn 7.4 CEUs

This is experiential learning…students learn the rigorous methodology of CISR® by DOING.

CERTIFIED CISR® PRACTITIONER

Like Six Sigma training, students learn by LEADING A TEAM through the completion of a project, and organizational sponsorship is required. The 14-Week online course includes 1:1 Coaching for certifying project completion. Candidates log on at any time to view the recorded lectures, complete assignments, and interact with classmates, coaches and instructors. A comprehensive workbook of exercises and templates is provided weekly.

ORIENTATION WEEK

	Learning Objectives	Tools & Techniques
S	**Subjects:** A thorough exploration of 7 Subjects of Social Responsibility. Nearly 40 issues are addressed across the 7 Subjects, adding complexity, compared to DMAIC. Intro to GRI – Global Reporting Initiative and how it is used with ISO 26000. *Project is scoped*, and charter *drafted.*	• ISO 26000, Intro to GRI • CTS Tree • Pareto and Bubble Charts • Materiality Intro
	Stakeholders (2 Parts): An in-depth examination of Stakeholder Engagement Planning, including identification, shifting from Voice of the Customer to Voice of the Stakeholder, QFD & TRIZ Intro, Stakeholder Engagement Power & Influence Analysis (SEPIA™) Tool, Materiality, and methods for generating dialogue. Social Media intro. **Coaches Assigned.**	• SIPOC to SIPOS • Intro to QFD • Intro Lifecycle Analysis • TRIZ Intro • SEPIA™ Tool • Materiality Analysis – Pugh Matrix • Intro Communications Planning
O	**Objective:** All CISR activity should be linked to the *business objectives* of the organization. Organizational goals, objectives, and resource allocation for the SOFAIR project determined. TRIZ concepts continue. Organizational objectives & Project Narrative completed.	• Hoshin Kanri • SWOT analysis • TRIZ Ideal Final Result (IFR) • Narratives • Internal/external contextual analysis
F	**Function & Focus (2 Parts):** We want maximum impact, with the minimum resources for our SOFAIR project. This requires the application of *systems thinking* and prioritization tools. We want to consider the full lifecycle of our products and services and understand the functional aspects of our processes. The focus of the project is further refined. Focused Goal Statement – Project Charter complete.	• Lifecycle analysis (LCA) • Process flow analysis • Value Stream Mapping • QFD Continued • Project Scoping • Theory of constraints • Strategy & measurement

SYNTHESIS WEEK

	Learning Objectives	Tools & Techniques
A	**Analyze (2 Parts):** We want to understand the relationships between inputs and outputs, studying in great detail the relationship between what we do and how it impacts our Stakeholders. Tools categorized as either risk analysis or root cause analysis tools. Risk analysis, through tools like SRFMEA, helps prevent irresponsible action before it takes place. Root cause analysis helps us correct irresponsible action after it has already happened. Preventive versus Corrective Action.	• SR-FMEA Social Responsibility Failure Mode Effects & Analysis • 5-Why's • Fishbone Diagram • Condition/Action Analysis • Hypothesis Testing • Regression Analysis
I	**Innovate (2 Parts):** TRIZ is not a single tool, but a structured method that can be used to rapidly generate plausible concepts that solve problems in technical and non-technical domains through innovation.	TRIZ – Acronym Russian term, meaning "Theory of Inventive Problem Solving". (More than one tool – a method) • 7-Ways
	Improve: Even with incremental improvement we want to determine *many* potential solutions using creativity and collaboration techniques. Once many solutions have been generated, then we can use a prioritization matrix to select the best amongst many. Project Management..	• Solution Prioritization Analysis • Project and Change Management • Preparing for Communication • Project Pipeline Management
R	**Report & Repeat (2 Parts):** Ensure that the social responsibility principles of transparency and accountability are achieved through external reporting. Identify the next improvement opportunity at the conclusion to every project. We also ensure there is a feedback loop with *Stakeholders,* to develop true dialog. Reporting & Strategy Deployment.	• Review Reporting Options • Focus on GRI • Hoshin Kanri • Project Pipeline Communication • Implementation Plan Presentation

"This course has been the only source of practical content for improving Social Responsibility I have found.

Until I began working on the CISR Certification, I was not fully aware of the power of strategic thinking in the realm of social responsibility."
-Billy Ingram, Director of Lean Product Development - Interface

Become a Sustainability LEADER...

Connect Social Responsibility to business strategy
• Increase competitive advantage & profitability
• Achieve business objectives through SR

Become an employer of choice
• Attract the best talent and retain high performers
• Make a difference in your community

Improve employee engagement
• Encourage discretionary effort
• Create a culture of teamwork & responsibility

Elevate reputation & manage risk
• Learn best practices to publicize improvements
• Head-off potential problems to focus on success

...Transform your organization and your career

"This is not just an online course where you're out on your own.

The coaching I received helped hold me accountable, so I made progress every week. I've really enjoyed the discussion boards, as well as networking with other participants and instructors."
-Brion Hurley, Lean Six Sigma Master Black Belt
Rockwell Collins

The Culture of Continual Improvement for Social Responsibility Grows as Practitioners LEAD TEAMS in Strategy-Focused Projects

Coaches

Cheryl Adas
Lean Master Black Belt, CPLP
Xerox Corporation (ret.)

Holly Duckworth, PhD
Chief Learning Officer
Kaiser Aluminum

Parisa Ellisor, PhD
Certified Environmental Auditor & Safety Manager
PAK Global Environmental Consulting

Richard Henrick
Certified Quality Engineer & Auditor
Sanmina Corporation

Andrea Hoffmeier
Six Sigma Black Belt, TRIZ Practitioner
SHERPA Sustainability Institute

Matt Horvat
Expansion/Process Improvement
Program Manager
The Vancouver Clinic

Brion Hurley
Lean Six Sigma Master Black Belt
Rockwell Collins

Billy Ingram
Director, Lean Product Development
Interface Carpet

Bob Kollm
Six Sigma Black Belt
Heritage Home Group

Oscar Rodriguez-Gonzalez, PhD
Certified Food Scientist, Professional Agrologist,
Certified Quality Engineer

Example Projects

Consumer Issues

New Manufacturing Method Communications Launch
Optimizing success of new product launch, through strategic sales and marketing aimed to clearly communicate benefits and educate consumers.

Improved Product Information & Education
Increased sales of healthier snack choices in vending outlets, by providing access to ingredients and nutrition information.

Employee Engagement & Organizational Effectiveness

Improved Roles & Responsibility Descriptions/Definitions
Elevated individual and team effectiveness, higher job satisfaction and elimination of duplicate efforts.

Improved Onboarding of Temporary Workforce
Increased retention of high turnover population, resulting in cost savings, higher morale, and more plentiful permanent employee candidate pool.

Enhanced Employee Recognition Program
Improved morale and job satisfaction by aligning rewards with employee preferences and performance expectations.

Community Involvement & Development

Supporting Local Business Effectiveness
Increase local, independent coffee shop profitability, through *Bring Your Own Cup* campaign, also benefitting environment.

Improved Non-Profit Operations
Streamline incoming shipments for organization dedicated to re-selling building materials, resulting in waste reduction and safer operations.

Environment, Health & Safety

Hazardous Material Handling Improvements
Mitigation of risks related to handling of highly flammable materials in solar energy manufacturing process.

NOMINATE Candidates for Coaches or Veterans Scholarship
www.sherpasustainabilityinstitute.com/cisr-practitioner-nomination-form
**Coaches Scholarship is for deserving professionals without employer professional development support.
Candidates are selected by CISR Coaches.**

CERTIFIED CISR® PRACTITIONER

CERTIFIED CISR® PRACTITIONER

Students connect with assigned CISR® Coach throughout class, to ensure that project components are accurate and on track.

Interested in becoming a CISR Coach? Email:
info@sherpasustainabilityinstitute.com

Completion of a project is required to earn certification as a CISR® Practitioner.
Project need NOT be decided to JOIN the course. Project ideas discussed and identified during Orientation and the initial weeks, the S-Phase of SOFAIR.

SOFAIR Projects are completed in an *organization,* rather than general societal issues. Therefore, an *organization* must be identified to join the course and organizational support is required. Projects are a *team* effort. Candidates must assemble and lead a SOFAIR Project Team to complete their project.

Project is scoped in the third phase of SOFAIR, the F-Phase, to ensure the boundaries are reasonable for completion by end of the program.
Course ends with a Project *Plan* for on-going implementation after instruction.

Q: I do not have a Six Sigma Green Belt. Can I participate?

A: Yes. We have selected online tutorials for Non-Belt participants, to gain familiarity with all Six Sigma Tools.

Q: What is required for CISR® Practitioner Certification?

A: All assignments must be completed, a passing score on all quizzes, and SOFAIR Project completed within an organization. Projects are team efforts – the Candidate must lead a Project Team. The project is considered completed for certification purposes when Candidate submits project presentation, with Project Implementation Plan and Future Project *Pipeline (the project is not implemented in the 14 weeks of the course).*

Q: How much class time will be required for each week of the course?

A: Total time is estimated at 5 hours per week, viewing lectures, reading, participating in discussions, completing a brief quiz, and completing project assignments.

Throughout the 14 weeks of instruction and lecture break, Candidates will be meeting with their Project Team, at least once per SOFAIR Phase.

There are additional learning materials for *non-Six Sigma-Certified Participants. These* Green Belt level Six Sigma Tool tutorials add another 10 hours of content to the course.

Q: What happens if I do all of my project work, but nothing improves?

A: The first point is that the *project is not implemented* during the 14 weeks of the course. In the final 2 weeks, a project implementation plan is developed.

Secondly, many processes are extremely complex. And thus, many projects are foundational. Any process change toward improvement is improvement, even if measurable improvements in outcomes require multiple projects to achieve. That's why we end each SOFAIR Project with Report and *Repeat.* What's important is to demonstrate that you understand the SOFAIR method.

Q: What are the benefits of CISR Practitioner Certification?

A: Organizations across the globe are recognizing the benefits, and expectations of them to operate in a more socially responsible way. Be recognized for your ability to connect social responsibility to organizational strategy. Be a leader in your organization and industry. Your credential will be verifiable; certification status and project presentation will be curated online, in searchable format, by SHERPA. You will be recognized as a pioneer of the next generation of Quality-based skills, focused on improving Sustainability and Social Responsibility performance in meaningful, measurable ways. **Certified CISR Practitioners may be sponsored to present their projects at industry events and to publish in papers, articles and more.**

Q: What if I don't have any ideas for the project?

A: Don't worry! You'll have all the support you need. Certifying Project ideas are discussed in the course and with your CISR® Coach. Your project is scoped in Week Three, to ensure the boundaries are reasonable for completion. **Course ends with a Project *Plan* for on-going implementation.**

Q: My employer might not give permission to present my project. What should I do?

A: We recommend options outside of work for you to complete, such as a community-based project. You must complete your project in an organization, rather than addressing a general societal concern.

Q: What is the cost of the program?

A: The individual registration fee is $2950, which includes all materials for the 14 weeks of instruction, as well as 1:1 coaching during course completion..

Q: Is there a group rate?

A: For group rates, please contact us. **info@sherpasustainabilityinstitute.com**

NOMINATE Candidates for Coaches or Veterans Scholarship

CERTIFIED CISR® PRACTITIONER

CERTIFIED CISR® PRACTITIONER

www.sherpasustainabilityinstitute.com/cisr-practitioner-nomination-form

Program Champions, Project Sponsors, and Key Team Members gain the knowledge needed.

CISR® ADVOCATE

This six-week online course provides a high-level understanding of the SOFAIR Method, and the roles that support successful, strategy-focused projects. By understanding where Practitioner Candidates are in the process (and where they will be), CISR Advocates are critical to success.

Resources are provided weekly, addressing the specific roles of Program Champions, Project Sponsors, and Key Team Members.

Week of Study	Lecture Topics
1	• Welcome & Orientation, basic vocabulary, awareness of culture change needs • 1,500 Year Thinking • Sustainability versus social responsibility • Roles: Program Champion, Project Sponsor, Key Team Members
2	• Awareness SOFAIR: Stakeholder & Subjects, Objective • S-Phase purpose and tools • O-Phase purpose and tools • Project Charter
3	• Awareness SOFAIR: Function & Focus, Analyze • F phase purpose and tools • A phase purpose and tools • Focused Goal Statement • In-depth study of Team Member's Role
4	• Awareness SOFAIR: Innovate & Improve, Report & Repeat • I phase purpose and tools • R phase purpose and tools • Reporting, Communicator's Role
5	• Application: Becoming a CISR® Advocate & Applying Principles • CISR roles and responsibilities • Advocate responsibilities • Behaviors of successful Advocates: 20 minutes • CISR Roles and Responsibilities: 20 minutes • Project Examples • Recognizing great projects
6	• Comprehension: CISR Culture and Business Integration • Understanding of what CISR Culture is • Sustainability as business strategy • Integrated Sustainability

While CISR® Advocates do not complete a project themselves, they are the key to success of the Practitioner Candidate.
The Advocate Course provides Program Champions, Project Sponsors, and Key Team Members a high-level understanding of the SOFAIR Method. By understanding where Practitioner Candidates are in the process, and their roles in the program and projects, CISR® Advocates are able to support success.

CISR® ADVOCATE

CISR® Practitioner Weeks

SYTHESIS WEEK

1	2-3-4	5	6-7	8-9	10-11-12	13-14
Stakeholders/ Subjects		Objective	Function/ Focus	Analyze	Innovate/ Improve	Report/ Repeat
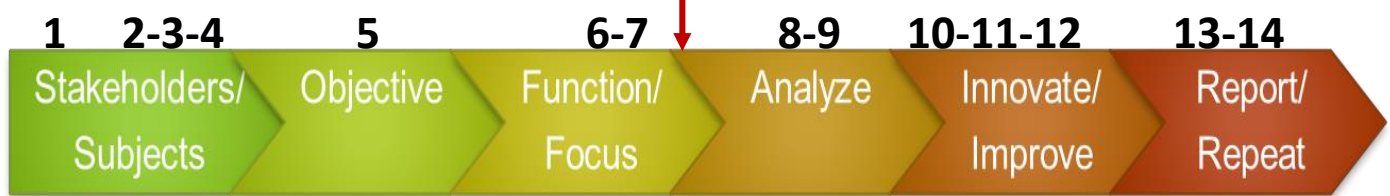
CISR® Advocate Weeks

1	2	3 4 5	6

CISR® Advocate Course remains open and resources accessible for 6 months, as Practitioners complete their course and SOFAIR Project implementation is completed.

Building a CISR® Culture Begins with Advocates Setting Strategy

Set Strategy

Continual Improvement Executives

-Master Black Belts
-Group Leaders

COACHES

CERTIFIED CISR EXPERT

CISR® ADVOCATE

CERTIFIED CISR PRACTITIONER

Program Champions
-Organizational Leaders
-CSO
Chief Sustainability Officer
-EHS Leader
-COO

Strategy-Focused Projects

Stakeholder Engagement & Reporting

CISR® ADVOCATE
-Project Sponsors
-Key Project Team Members

-Engineers
-Team Leaders
-Project Managers
-Green & Black Belts

Stakeholder Engagement System MANAGERS

- PR, Investor Relations, Communications
-Marketing & Stakeholder Engagement

Stakeholder
Engagement
System

AA1000

GRI *Empowering Sustainable Decisions*

ISO 26000 SOCIAL RESPONSIBILITY

SES & STRATEGY

SEPIA tool
Stakeholder Engagement
Power & Influence Analysis

LESS	MORE

TOOLS TEMPLATES

SCORECARD

REPORT

CISR®
Continual Improvement *for* Social Responsibility

COMMUNICATE

Stakeholder Engagement System Development & Management
a CISR® Course

Week of Study	Lecture Topics
1	• Welcome & Orientation • Risks & Benefits of Stakeholder Engagement Intro • GRI & AA1000 Intro • Overview of other reporting frameworks • ISO 26000 Intro – 7 Subjects of Social Responsibility • Overview of developing and managing an SES
2	• SES as part of Business Strategy • Steps to Planning • Materiality Intro • SEPIA - Stakeholder Power & Influence Analysis Intro • Risks inherent to planning • Whole organization-planning
3	• Steps to Preparation • SEPIA - Stakeholder Power & Influence Analysis Tool • Materiality Analysis • Risks inherent to preparation • Whole-organization involvement
4	• Systems Thinking • Steps to Implementation, Tools & Templates • SEPIA Tool & Communications Planning • Risks inherent to implementation • Whole-organization integration
5	• Monitoring and Improving Performance • Gathering data and building score cards • Steps to Improvement • Risks inherent to improvement • Creating the CISR® Culture
6	• Synthesis of all course topics • Case study examples of SES outcomes • Real-world action planning (application of concepts) • Writing & publishing reports – risks of poor reporting • Additional methods of Stakeholder feedback loops Marketing, PR, POP, Packaging, Social Media, etc. • Call-to-action: Apply the learning

Optimize Benefits
Manage Risks

Stakeholder Engagement System

Stakeholder Engagement carries with it both benefits and RISKS.

Diverse stakeholder input can create chaos, confusion and backlash. And failing to meet performance improvements expected by stakeholders can create a reporting scenario that does more harm than good.

Stakeholder Engagement System Development & Management

Six Week Online Course

Learn skills to plan, prepare, implement, and improve engagement with your stakeholders using widely recognized global frameworks.

SES is the CORNERSTONE of a CISR® Culture

-Continual Improvement Executives

-Master Black Belts
-Group Leaders

Set Strategy

COACHES

CISR ADVOCATE

CERTIFIED CISR PRACTITIONER

CERTIFIED CISR EXPERT

Stakeholder Engagement & Reporting

Strategy-Focused Projects

Who should participate?
• CSO – Chief Sustainability Officer
• CSR Executives
• Investor Relations
• Corporate Communications Professionals
• Sustainability Reporting Administrators
• PR Professionals
• Social Media Managers
• EHS Reporters
• Stakeholder Engagement Professionals
• Community Relations Managers

Stakeholder Engagement System
MANAGERS & LEADERS

CISR ADVOCATE

-Engineers
-Team Leaders
-Project Managers
-Green & Black Belts

-Project Sponsors
-Key Project Team Members

CISR® Continual Improvement for Social Responsibility

The Goal is NOT simply a series of SOFAIR Projects…
The Goal is Culture Change.

SHERPA SUSTAINABILITY INSTITUTE

SherpaSustainabilityInstitute.com

A Culture of Continual Improvement for Social Responsibility connects SR to *business strategy*.

Projects are conducted with objectives such as: elevating reputation, increasing employee engagement, becoming an employer of choice, getting involved with the local community, mitigating risks, and opening new markets

3-Phase CISR® Integration Plan

PHASE	STEPS	CISR® CULTURE INITIAL DEPLOYMENT - 26 WEEKS																								
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
1	1	Set Strategy																									
	2	SES DEVELOPED & DEPLOYED																									
	3	CISR® CERTIFIED EXPERT PHASE 1 - SHERPA COACHED														FUTURE INTERNAL COACHES											
	4				LEADER ADVOCATES					PROGRAM CHAMPIONS & PROJECT SPONSORS																	
2	5					CISR® PRACTITIONER PHASE 2 - SHERPA COACHED																				
	6									CISR® ADVOCATE				KEY TEAM MEMBERS												
3	7												CISR® PRACTITIONER PHASE 3 - INTERNALLY COACHED													
	8															COACH TRAINING										

8-Step Organizational Deployment Schematic

1 Set Strategy
-Continual Improvement Executives

3 COACHES — CERTIFIED CISR® EXPERT

8 -Master Black Belts -Group Leaders

Stakeholder Engagement & Reporting

4 CISR® ADVOCATE

7 CERTIFIED CISR® PRACTITIONER

Program Champions
-Organizational Leaders
-CSO
Chief Sustainability Officer
-EHS Leader
-COO

Strategy-Focused Projects

6 CISR® ADVOCATE
-Project Sponsors
-Key Project Team Members

5 -Engineers
-Team Leaders
-Project Managers
-Green & Black Belts

Stakeholder **E**ngagement **S**ystem
MANAGERS & LEADERS

2 - PR, Investor Relations, Communications
-Marketing & Stakeholder Engagement