



# EquiBlend

**The Right Blend of People, Planet, and Prosperity**

**2024**

# Acknowledgement of Country

We acknowledge the Traditional Owners of this great Country, throughout all of Australia and recognise their continuing connection to land, waters and culture.

We pay our respects to their Elders past and present.

# We are EquiBlend

**EquiBlend** is an ESG & Sustainability practice established within the **Alliance Community Group**. We are **certified** Australian Indigenous owned ICT Company registered with **Supply Nation**, the national register of Indigenous businesses.

## Vision

We believe in a world where businesses are truly **sustainable**, setting a **new standard** by making their **impact** on both people and the planet as important as their profitability.

## Mission

EquiBlend is on a mission to help organisations to elevate their focus from purpose to prosperity, by achieving **the right blend of People, Planet, and Prosperity.**

Our purpose is to help organisations achieve the right blend of People, Planet, and Prosperity.



# Purposeful AND Profitable

At EquiBlend, we are dedicated to helping our clients understand how they can be both purpose-driven and profitable at the same time - this is what we call the pathway from 'Purpose to Prosperity'.

## Starting with Purpose

We help organisations to move beyond mere dabbling or survival and recognising that unlocking their purpose should be the mission.

## Pathway to Prosperity

With purpose unlocked, we help map the pathway towards profitability converted into positive social & environmental impact through authentic and measurable action.

**“If you care about something, do something about it.”**

Dr Sean Barnes

**A Harvard Business School study showing that “high sustainability” companies outperform “low sustainability” ones by as much as 40%.**



# Products & Services

We deliver a comprehensive suite of services to help organisations understand how to deliver sustainability as a key outcome of their operations.

## Social Value Measurement



## Sustainability Platform



## Sustainability & ESG Strategies



## ESG Coaching



## Decarbonisation Strategies



## Purpose Discovery Workshops



# Our Leadership Team

We are a highly diverse group of leaders and specialist who are passionate about our vision and mission to transform organisations around their unlocked purpose.

## Australian Indigenous Leaders



**Dion Devow**  
CEO, indigipath  
CEO, Yerra



**Simon O'Toole**  
CEO, Alliance ICT  
CEO, Dreaming Machines



**Joshua Jovanovski**  
CEO, EquiBlend  
CEO, Quality Quantity



**Elizabeth Webb**  
Education Lead

## International Indigenous Leaders



**Maka Kama**  
Managing Partner  
Chief Purpose  
Officer



**Anthony Tran**  
Chief Operating  
Officer



**Matt Mathauda**  
Chief Impact Officer  
EquiBlend MD



**Larry Vidal**  
Chief Relationship Officer  
DiverSupply

## Programs



**Dr Daniel Fujiwara**  
Social Value  
Measurement



**James Kama**  
Transformation  
Delivery



**Cherry Ward**  
Sustainability  
Leadership



**Lauren Ryder**  
Executive Leadership  
& Training

## Advisory



**Dr Jess Tayel**  
Transformation  
Leader



**Erlene Graanoogst**  
DEI&B Advisory



**Chris Sampson**  
Systems Thinking  
Advisory



**Natasha Hanisi**  
Community  
Advisory

# The Power of Partnerships

We partner with purpose-led transformation leaders in their field to provide our clients with an ecosystem of best-in-breed operators to meet all of their needs, big and small.



- ESG + RAP Tracker.
- Contingent Payroll.
- Diversity Talent.



- Executive Level Business Coaching.
- Leadership Development.



- Global Sustainable Procurement Frameworks.



- Data For Good.
- Data Consulting.
- Data Architecture.
- Data Platforms.



- Enterprise Change Management.
- Organisational Remodelling.



- Data-Driven Sentiment Analysis.
- Measurement of the success Digital Inclusion.



- Cloud platform Delivery.
- First Nations Digital Consulting.
- Global Digital Operations.



- Data-led policy development.
- Data storytelling.
- Community Design Innovation.




- Sustainability Consulting.
- Carbonisation Strategy.
- Sustainable Procurement Practices.



- Social Impact.
- Community Co-Design.
- Digitally Inclusive Experiences.



# Purpose-Led Transformation Services

In 2024, based on overwhelming demand, we added two new practices separate to  **Alliance ICT** including:



**indigipath** - a practice delivering **cultural consulting** services [[www.indigipath.org](http://www.indigipath.org)], and



**EquiBlend** - a practice delivering **ESG/sustainability consulting** services [[www.equiblend.org](http://www.equiblend.org)].

We also established **Alliance Community Group** [[www.alliancecg.org](http://www.alliancecg.org)] to bring all three practices together to deliver **'Purpose-Led Transformation'** services to unlock our client's purpose and transform their organisation around this purpose with:



**Alliance  
Community  
Group**

- **Culture** as a **Foundation**,
- **Technology** as an **Enabler**, and
- **Sustainability** as an **Outcome**.

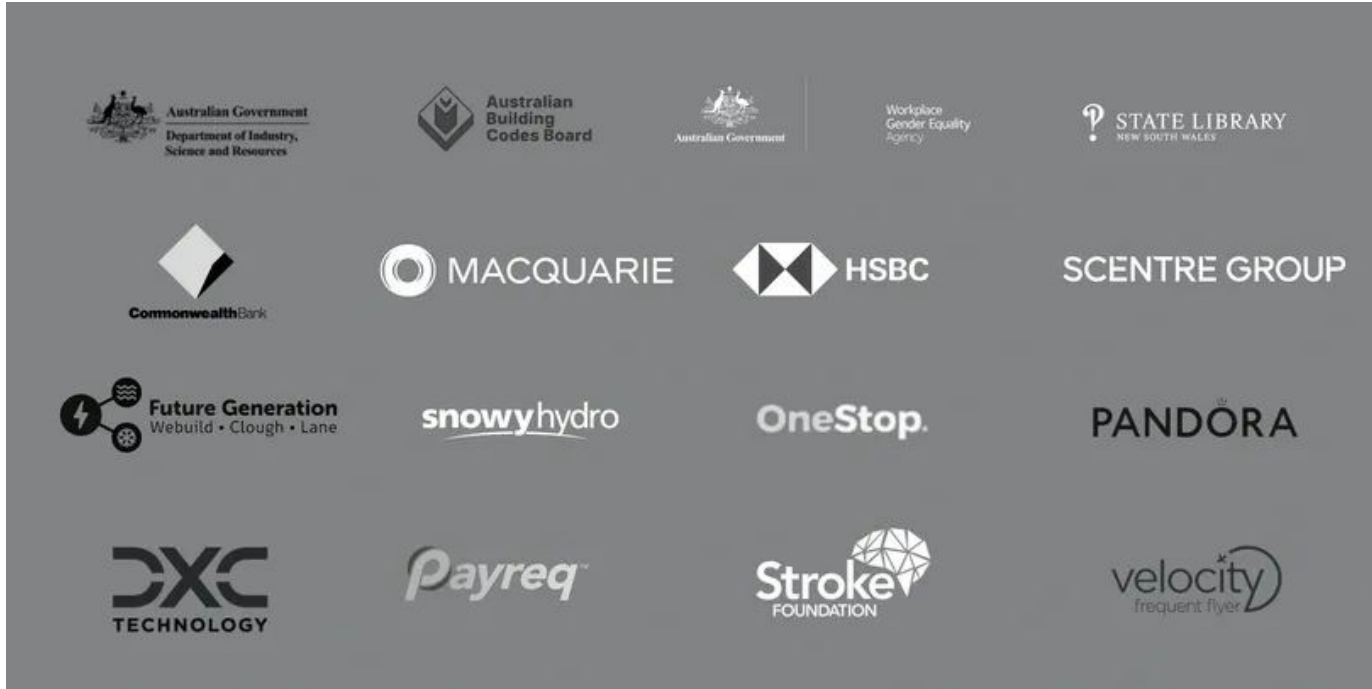
This is for organisations whose leaders have a **desire to turn their core function** into the delivery of **positive social and environmental impact** which is **also highly profitable/sustainable** as a key strategy.





# Clients across all industries

We are proud to have served clients of all sizes and backgrounds and across all industries.



# Further information

We provide further detailed information to this pack as follows:

**Appendix A: Social Value Measurement Practice**

**Appendix B: ESG + Sustainability Services**

**Appendix C: Sustaira**

**Appendix D: Qualtrics**

**Appendix E: Case Studies**



# Next Steps

**Book a session today** to understand how you can engage us to help you achieve the right blend of People, Planet, and Prosperity.



**Matt Mathauda**

*Managing Director*



**EquiBlend**

*From Purpose To Prosperity*



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<https://www.linkedin.com/in/mmathauda/>



# **Appendix A: Social Value Measurement Practice**

# Social Value Measurement (SVM)

EquiBlend's **Social Value Measurement Practice** can empower our clients with actionable insights to maximise its social, cultural, and economic impact.



**Social Value Dashboard:** Track What Matters Most, in Real Time. This advanced dashboard provides insights into Telstra's impact across decarbonisation progress, community engagement, and supplier performance. It highlights achievements in areas like climate resilience, biodiversity preservation, and Indigenous engagement, supporting data-driven decision-making and transparent reporting.



**Supplier Social Impact Survey:** Uncover Critical Supplier Contributions. This targeted survey captures supplier data on sustainability practices, Indigenous engagement, and alignment with decarbonisation and community goals. The insights empower Telstra to optimise procurement strategies, fostering stronger partnerships and alignment with ESG priorities.



**Quick-Start Training Session:** Turn Data into Actionable Insights. This session equips Telstra's leadership and operational teams with the skills to use tools like Qualtrics to interpret and apply social value data. By empowering teams, the training drives effective supplier collaboration, informed investment decisions, and improved ESG reporting.



**Monthly Snapshot Report:** Stay Ahead with Actionable Insights. Regular reports summarise Telstra's progress in emissions reduction, supplier diversity, and community contributions, reinforcing transparency and Telstra's leadership in sustainable telecommunications.

# SVM Methodology

## 1. Data Collection

Gathering subjective wellbeing data, typically through surveys that ask individuals to rate their life satisfaction and mental health. These measures capture the direct and indirect effects of policies on people's wellbeing.

## 2. Valuation of Wellbeing

Using statistical techniques, such as **wellbeing regressions**, to estimate the monetary value of changes in wellbeing. For instance, if a certain program leads to an improvement in life satisfaction, the methodology calculates how much this improvement is worth in economic terms, similar to valuing tangible assets.

## 3. Linking to Strategic Outcomes

The estimated wellbeing valuations are then applied to assess the broader social impact of specific policies or interventions. This allows for a comparison of different programs not just based on economic output but also on how they improve lives. For example, investing in mental health services can be evaluated by the increase in wellbeing it delivers, offering a clearer picture of its societal value.



# SVM Benefits



**Optimised Procurement for Sustainable Outcomes:** Data-driven supplier evaluations align procurement with ESG goals, ensuring compliance with decarbonisation targets and supporting sustainable supply chains. These strategies enhance portfolio resilience and strengthen partnerships with socially responsible suppliers.



**Enhanced Workforce Productivity and Engagement:** Workforce well-being initiatives drive productivity and retention while strengthening Telstra's internal culture. These programs align with ESG priorities, fostering a workplace that supports innovation and operational excellence.



**Quantifiable Social Return on Investment (SROI):** comprehensive SROI reporting highlights Telstra's social, cultural, and environmental contributions. This transparency boosts brand equity, attracts ESG-conscious investors, and cements Telstra's position as a leader in sustainable telecommunications.



**Accelerate Infrastructure Approvals:** Social value metrics enable Telstra to highlight measurable benefits for local communities, First Nations peoples, and environmental sustainability. This approach accelerates regulatory approvals, strengthens stakeholder trust, aligns with national sustainability goals, and increases project valuations by up to 4x.



**Lead in First Nations & DEI&B Partnerships:** Telstra's focus on Indigenous-specific metrics enhances reconciliation efforts and cultural engagement. By aligning investments with heritage preservation and equity goals, Telstra builds long-term trust and delivers measurable outcomes that reinforce its role as an inclusive organisation.

# SVM Applications

Dr. Fujiwara's methodologies have been successfully applied across several sectors including:



## Public Sector

Advising key government bodies such as the **Ministry of Defence**, **HM Treasury**, **Ministry of Defence (MoD)** and the *Strategic Defence and Security Review*, **UK Social Value Act**, **OECD** and the **United Nations**.



## Infrastructure

Significantly increased the **Development Approval process** by delivering *up to x4 the project value* of the UK's 7 out of 10 largest infrastructure projects. Measured the economic value of social housing projects, revealing how affordable housing reduces government costs in **healthcare** and **crime**, while stimulating **local economies**.



## Energy

In a project with a leading energy company, valuation techniques showcased the **long-term economic benefits** of **sustainable energy** programs, helping the company attract **impact investors** and secure **government subsidies**.



## Telecommunications

Proved that subsidised access to superfast broadband significantly improved subjective wellbeing, highlighting the broader social value of broadband infrastructure investments, extending beyond economic metrics to encompass improvements in quality of life and community resilience.



## Healthcare

Well-being valuation quantified the impact of mental health initiatives, leading to better resource allocation in healthcare systems and improved **patient outcomes**.

**See Appendix E: Case Studies for further details**





# Dr Daniel Fujiwara

Dr. Daniel Fujiwara is a globally recognised expert in social value measurement and well-being economics and is the leader of **EquiBlend's Social Value Practice**



*Dr Daniel Fujiwara*

- With decades of research and practical experience in monetising social impact, he enables businesses and governments to quantify the value of their social initiatives in financial terms.
- His expertise helps our clients go beyond compliance, providing insights into how social investments translate into economic outcomes.
- His frameworks, such as Social Return on Investment (SROI) and well-being valuation, turn social value into financial metrics, justifying investments in sustainability, ESG, and community engagement projects.

Dr Fujiwara's frameworks translate social value into measurable outcomes that improve **employee productivity**, **community relations**, and **financial performance**, while mitigating risks related to **ESG compliance**.



# SVM Practice

Our Social Value Measurement Practice is comprised of global leaders and local experts, providing Telstra with the world's leading capability in SVM.



**Dr. Daniel Fujiwara**

SVM Global SME



**Cherry Ward**

ESG Practice Leader



**Dr. Paul Dolan**

SVM Global SME



**Mel Flanagan**

Design & Policy



**Dion Devow**

Cultural Consultant



**Lauren Ryder**

ESG Executive  
Coaching & Training



**Alan Taylor**

ESG Practice Leader

We are also partnered with the **London School of Economics** via our relationship with Dr Paul Dolan.



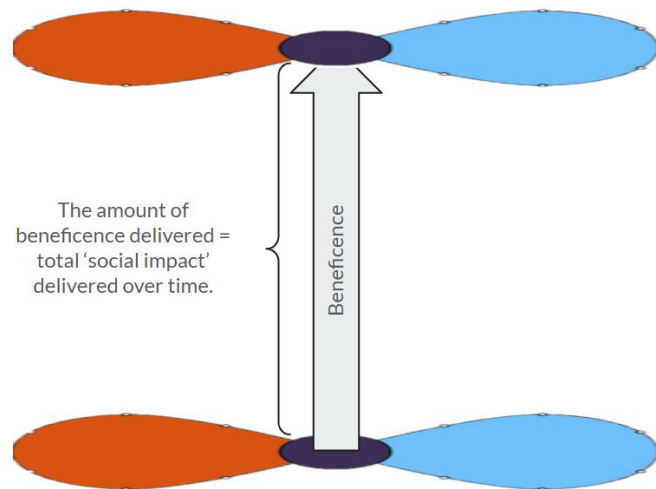
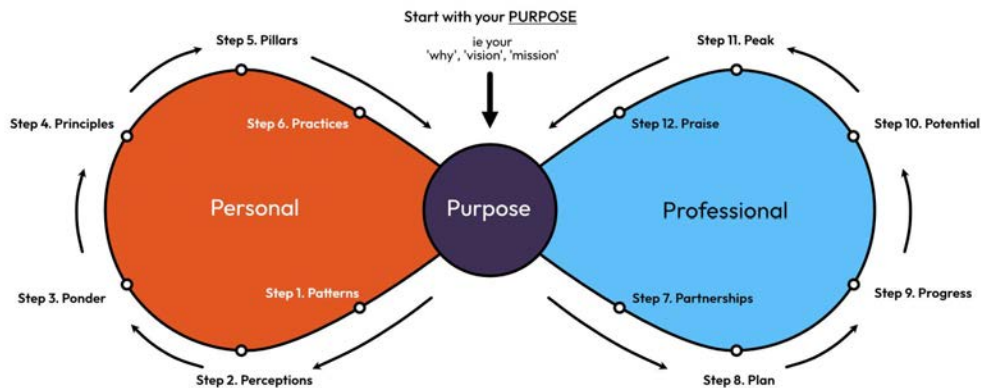
# **Appendix B:**

# **ESG +**

# **Sustainability**

# Beneficence Framework

We help organisations start with their **PURPOSE** and then build a high level strategy to deliver 'beneficence' to people and the planet over time whilst making a profit. ***The amount of beneficence delivered over time = social impact.***



# Inner Development Goals

We provide globally leading expertise in developing SDG Goal Strategies for our clients, starting with the Inner Development Goals.

We help our clients understand their Inner Development Goals which, when achieved, will enable them to be ready to create and deliver SDGs.

We have the only qualified IDG Practitioners in the southern hemisphere:



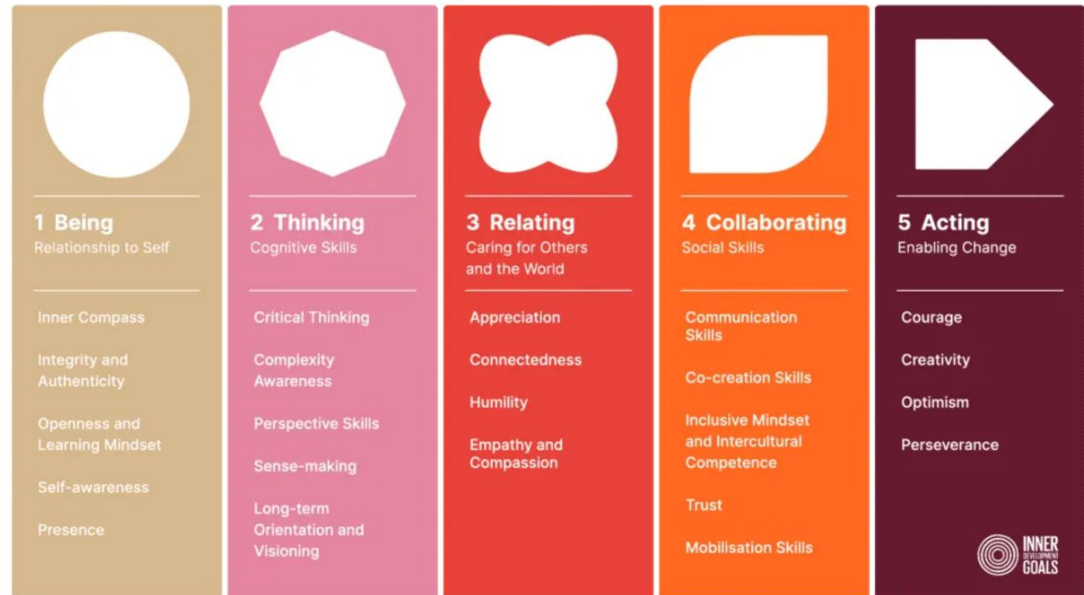
**Cherry Ward**

ESG Practice Leader



**Alan Taylor**

ESG Practice Leader



# SDG Goal Strategies

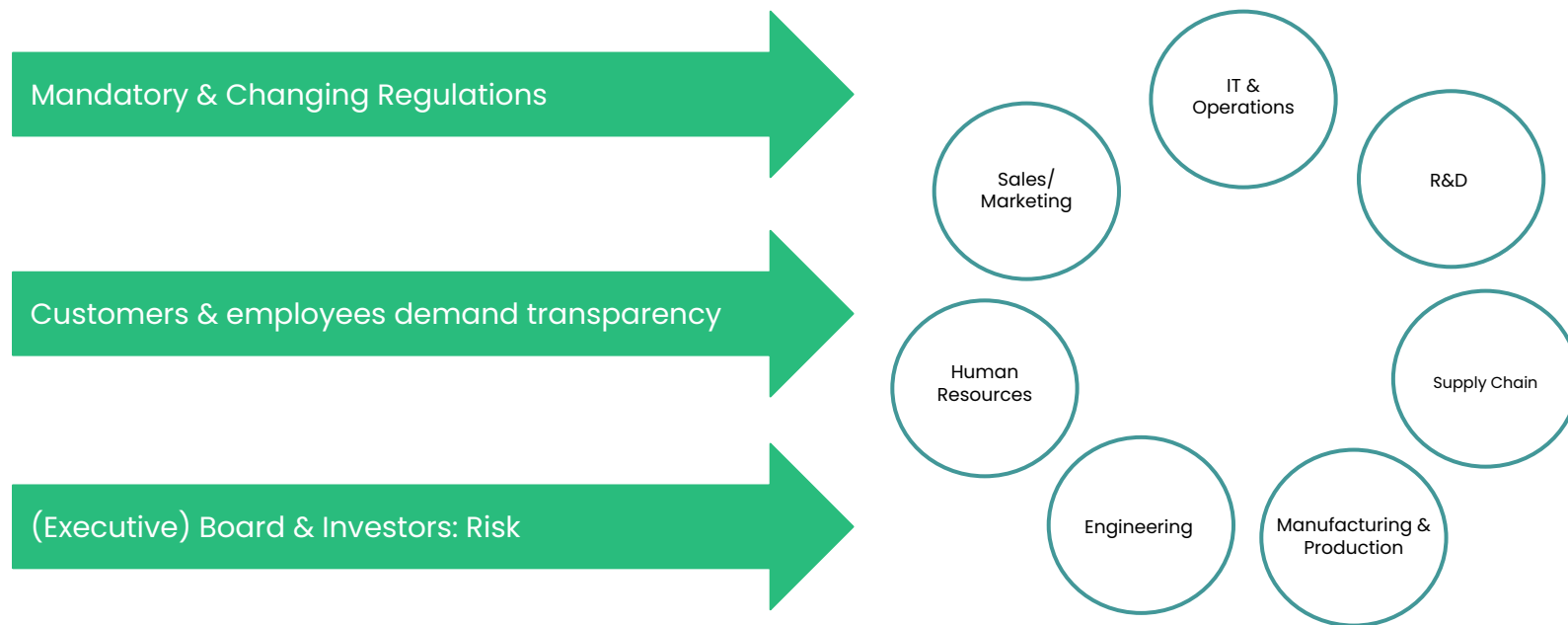
When clients are ready, we map their ESG strategy to the achievement of the United Nations SDGs.

Every element of an ESG strategy can be traced to a combination of multiple SDGs and we are able to calibrate the allocated contribution mathematically using our econometric capabilities in our **Social Value Measurement practice**.



# ESG is Cross-Functional + Dynamic

ESG + Sustainability strategies are critical now more than ever - particularly as the ecosystem is becoming more complex and dynamic and it affects every aspect of the operations of an organisation.



# ESG challenges are requiring digital solutions

The ability to comply with the increasing reporting requirements regarding ESG and Sustainability is becoming more dependant upon the degree to which an organisation has digitised its operations due to the increased complexity of tracking and tracing impacts and resulting actions required.



**ESG Data is siloed  
and sits everywhere,  
incl. Legacy systems**



**Inefficient ESG  
disclosures &  
Reporting**



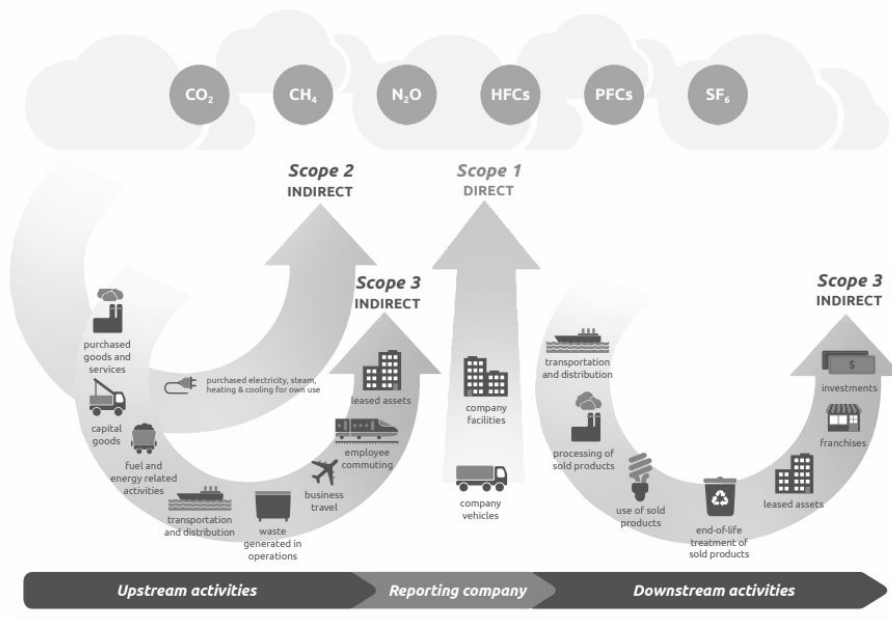
**Incapable to turn  
insights into  
measurable actions**





# Decarbonisation Strategy

We provide comprehensive consulting services to deliver Decarbonisation Strategies to help our clients achieve their Carbon Neutral or Carbon Zero emissions targets.

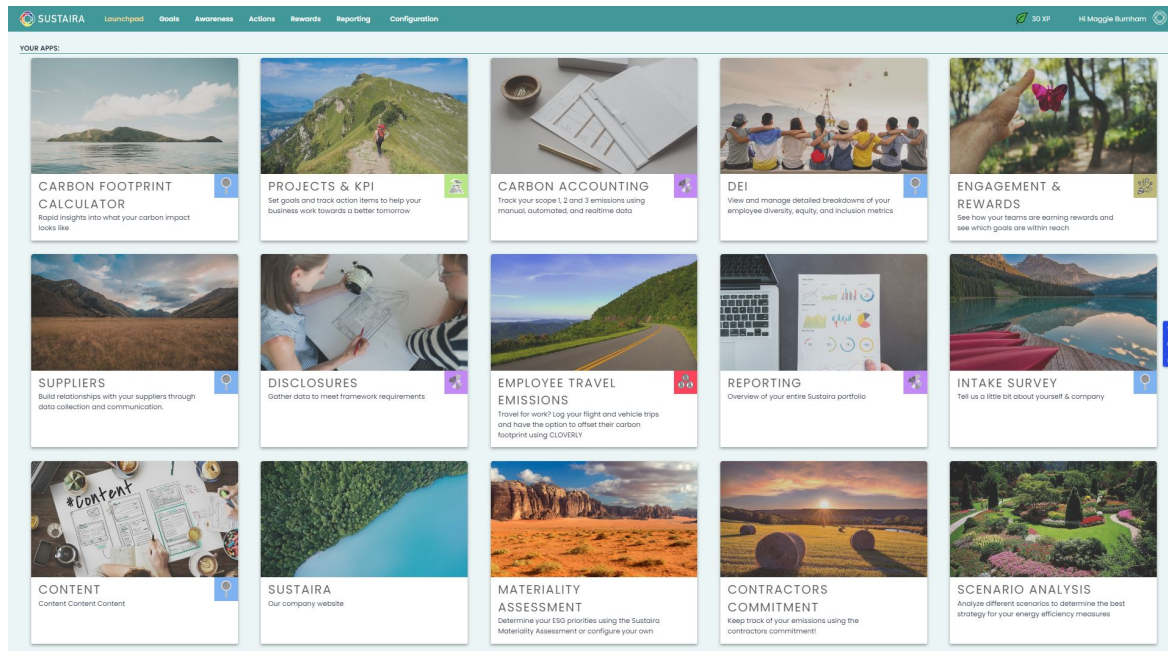


We emphasise the importance of focussing on the decarbonisation of business operations as a priority.

We also provide responsible carbon offset options which benefit First Nations communities in the process.

# ESG + Sustainability Platform

Our solution is to deliver **Sustaira** - one of the world's leading and most comprehensive, end-to-end ESG + Sustainability Platform solutions.



The solution is built on **Mendix low-code platform** and is able to be installed within **3-6 months** depending on the complexity of the needs of the organisation.

There are over **150+ sustainability apps and service accelerators** in the **Sustaira Marketplace**.

**See the Appendix for further information**

# **Appendix C:**

# **Sustaira**

## YOUR APPS:



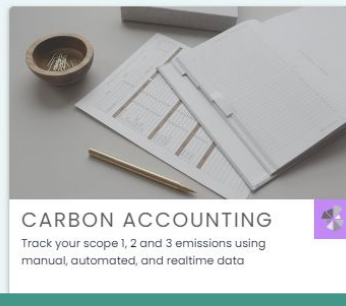
**CARBON FOOTPRINT CALCULATOR**

Rapid insights into what your carbon impact looks like



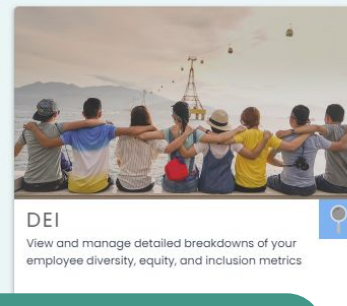
**PROJECTS & KPI**

Set goals and track action items to help your business work towards a better tomorrow



**CARBON ACCOUNTING**

Track your scope 1, 2 and 3 emissions using manual, automated, and realtime data



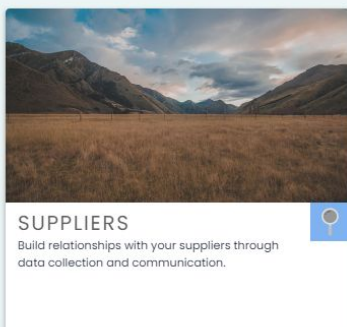
**DEI**

View and manage detailed breakdowns of your employee diversity, equity, and inclusion metrics



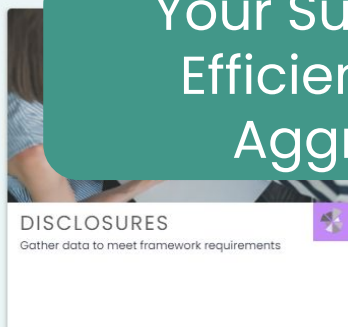
**ENGAGEMENT & REWARDS**

See how your teams are earning rewards and see which goals are within reach



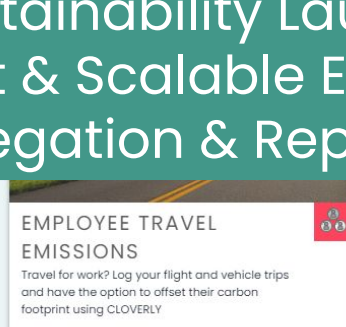
**SUPPLIERS**

Build relationships with your suppliers through data collection and communication.



**DISCLOSURES**

Gather data to meet framework requirements



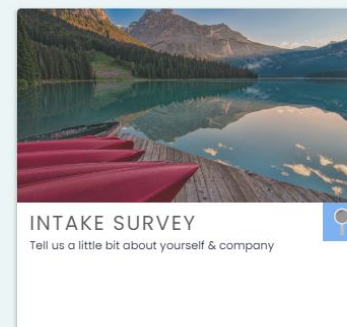
**EMPLOYEE TRAVEL EMISSIONS**

Travel for work? Log your flight and vehicle trips and have the option to offset their carbon footprint using CLOVERLY



**REPORTING**

Overview of your entire Sustaira portfolio



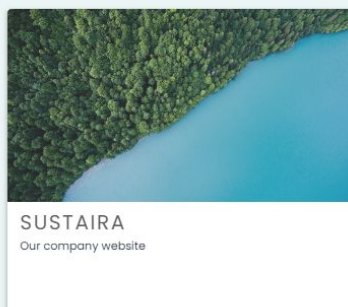
**INTAKE SURVEY**

Tell us a little bit about yourself & company



**CONTENT**

Content Content Content



**SUSTAIRA**

Our company website



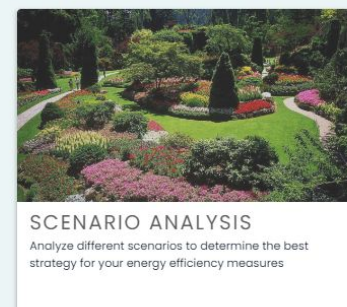
**MATERIALITY ASSESSMENT**

Determine your ESG priorities using the Sustaira Materiality Assessment or configure your own



**CONTRACTORS COMMITMENT**

Keep track of your emissions using the contractors commitment!



**SCENARIO ANALYSIS**

Analyze different scenarios to determine the best strategy for your energy efficiency measures

# Your Sustainability Launchpad: Efficient & Scalable ESG Data Aggregation & Reporting

# ESG + Sustainability Platform

We deliver **Sustaira** for our clients - one of the world's leading and most comprehensive, end-to-end ESG + Sustainability Platform solutions.



**ESG launchpad with building blocks** - Multi-tenant access with a single source of truth



**ESG Goals and KPI tracking** - 24/7 insights



**Sustainability Dashboarding** - Sharing Sustainability metrics with a unique UI/UX



**Carbon Accounting (incl. GHG calculators)** - data aggregation from multiple sources



**Supply Chain Sustainability** - aggregating and disclosing Suppliers Sustainability data



**Scenario Analysis** - Run Net-Zero scenarios top to optimize Sustainability journey



**Disclosures** - Disclosing ESG and Sustainability data according to standards, i.e. CSRD and CDP



# -Your Sustainability App Launchpad-

## Digital Reporting

### Carbon Accounting scope 1, 2 and 3 App

ESG Digital Twin  
Upstream and downstream reports  
Sustainability and ESG Reports  
ESG Disclosures  
**Dashboards**  
And more

## Results & Rewards

Sustainability Engagement  
Gamification and Rewarding  
ESG Efficiency Measures & Scenarios  
And more



## Actions

Carbon offsetting  
Diversification, Equity, Inclusion actions  
Employee travel emissions  
And more

## Goals

### Goals & KPI Tracking App UN SDGs and other frameworks

Materiality Assessment  
And more

## Data Aggregation & Awareness

### Carbon footprint, waste and emissions calculators

Waste Tracker app  
Diversification, Equity, Inclusion insights  
Sustainability data aggregation & surveys  
IoT Asset tracking & alarms  
Sustainability Supplier Management  
ESG Partner Verifications  
And more



### Internal Data sources



### External Data sources





### 3 Key Reasons

1. **Broader Sustainability software partnership** meeting all your current and emerging Sustainability needs: end-to-end or the filling gaps.
2. **Increased flexibility** via low-code building blocks, incl. powerful integrations and reusability.
3. **Trusted and proven** sustainability experience with Global presence backed by conglomerates Siemens & Capgemini.

Solution Paradigm shift:  
*Low Code building blocks*



# Key Features

## **Flexible online Sustainability solutions based on low-code building blocks**

Online multi tenant Sustainability solution that aggregates your sustainability and ESG information. Going beyond reporting, making it actionable and engaging. Stay in control with a single source of truth, enabling each entity, department & region.

## **Phased approach combining Consulting & Software**

We believe in a phased approach to prove our collaboration. Sustainability advisory services combined with cutting-edge software and apps, provide the foundation and flexibility for future needs.

## **Proven Pre-built connectors and over 150 Sustainability Accelerators**

Sustaira is leveraging the Mendix pre-built configurable connectors. Examples are with Workday, Oracle (Netsuite), Teamcenter, SAP and Salesforce. Integration is a real strength of the Sustaira solution, with APIs being available, while also having the ability to use webservices. For more information: [marketplace.sustaira.com](https://marketplace.sustaira.com)

## **Out of the box CO2 Accounting and Global app templates, rapidly customized**

Choose a template that most suits your needs and work with our team to make it your own. Each template is built to about 70% completion. We then expand from the base design and add any customizations of your choosing or create complete new app.

## **Co-creation In partnership with Siemens & Sustaira**

Sustaira leverages the Siemens low-code platform Mendix which is already been used by Bradken as well. You get the speed of a scale-up with the financial backing of a Fortune 500 firm.

## **Automatically and securely deployed on AWS**

Your applications are directly deployed in a secure AWS environment, inc. back-ups. Online access 24/7. We can also deploy your application locally on your preferred server and partners infrastructure, i.e. Ms Azure or Oracle.



# Key Benefits



**Operational cost savings** - Automated versus Manual Excel sheets leads to increased operational efficiency. Between 40% and 60% per FTE reduction depending on use case and the application.



**Fines and Fees** - non compliant with ESG disclosures such as CSRD, SEC leads to large fees and fines between ~ \$200k - \$1m+.



**Increased Profit & Revenue** - a 10-percentage-point increase in ESG spending correlates with a 1-percentage-point increase in profit growth.



**IT resource savings** - On average 6x faster development with low-code leading to increased time to market and lower IT spends (between \$50k and \$250k depending on use case).



**Improved time-to-market and change management** - App changes up to 10x faster vs. traditional coding, resulting in ~ \$150k annual savings (based 2 app changes p/m).



**Employee engagement** - Workplace recognition leading into retention and savings.

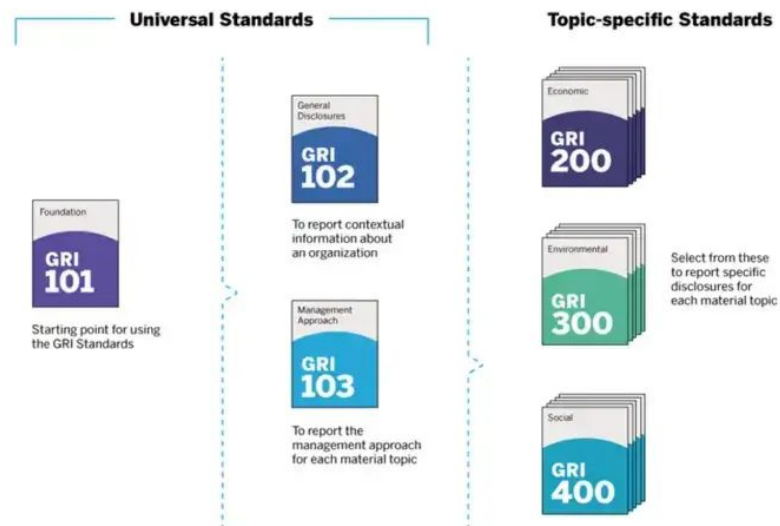


# Global Compliance

Sustaira offers a comprehensive platform designed to assist organizations in achieving compliance with both universal and topic-specific sustainability standards.

By integrating various applications and services, Sustaira enables clients to effectively manage and report on their Environmental, Social, and Governance (ESG) performance.

Sustaira's platform encompasses a range of applications that cover various aspects of sustainability and ESG, including risk and compliance, Environmental Health and Safety (EHS), and more.



# Sustaira – clients around the world

There are over 300+ global tenants on the Sustaira platform today across the North America, Asia and Europe.

## End-to-End Sustainability & ESG Platform



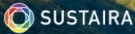
## Sustainability App Templates



## Custom (Sustainability) Apps



# Sustaira Marketplace

 **SUSTAIRA**

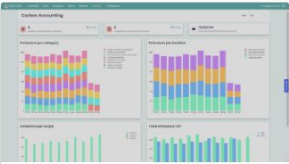
## Your Sustainability Accelerator Marketplace.

Search Sustainability solutions, services, connectors, or partners...


**Not sure where to start?**  
Discover what you need to take sustainability to the next level with our personalized recommendation

[Take me there](#)

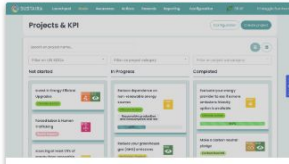
### Most Popular




**CARBON ACCOUNTING SOLUTION**  
Track your scope 1, 2 and 3 emissions



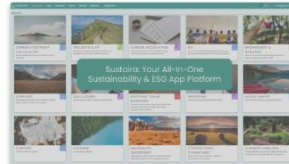
**SUSTAINABILITY AND ESG DISCLOSURES APP**  
The ESG Disclosures and Reporting



**SUSTAINABILITY GOALS & KPI TRACKER**  
The Sustaira Projects & KPI module is



**MATERIALITY ASSESSMENT APP**  
The Materiality Application is able to walk users through their materiality assessment process at times.



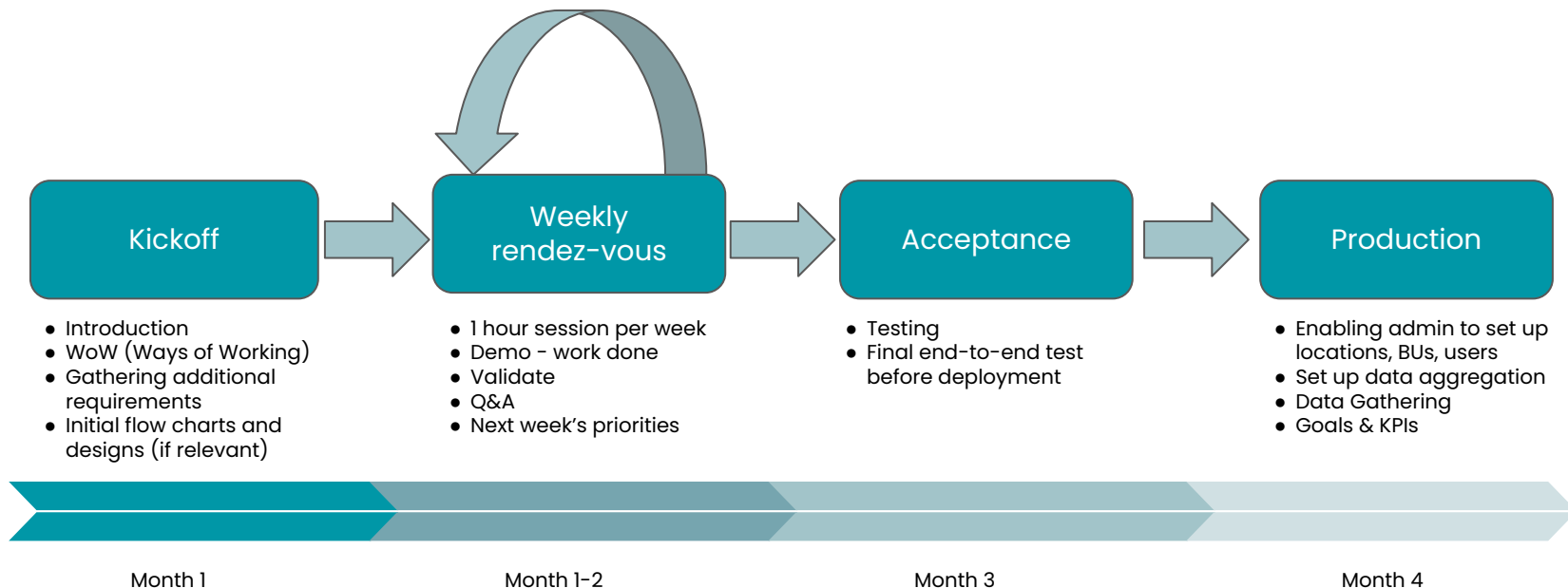
**SUSTAINABILITY LAUNCHPAD APP**  
Aggregate all of your ESG and Sustainability Data in the Sustaira Launchpad, access a single source of



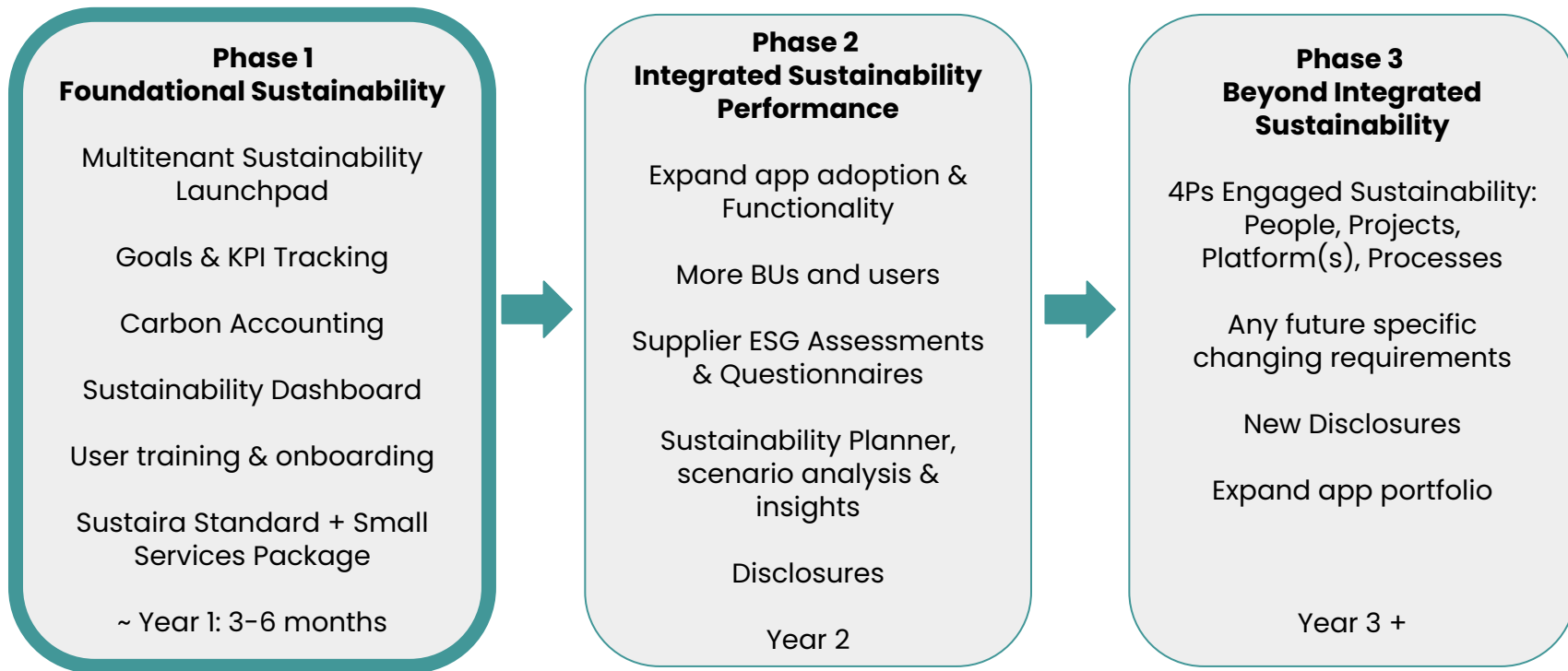
# Sustaira – mitigating software delivery risk

	Local Custom Development	Sustaira's Flexible App Templates	Enterprise out-of-the-Box Solution
Fits well with your organizational processes	✓	✓	✗
Avoid paying for functionality you don't use	✓	✓	✗
Flexible to grow with your needs overtime	✗	✓	✗
Keeps up-to-date with (international) standards	✗	✓	✓
Can meet all your current & future needs in one place	✗	✓	✓
Ensure user uptake with UX customizations	✗	✓	✓
Leverage existing trusted Mendix technology	✗	✓	✗

# Sustaira – typical implementation plan



# Sustaira – phased rollout of functionality

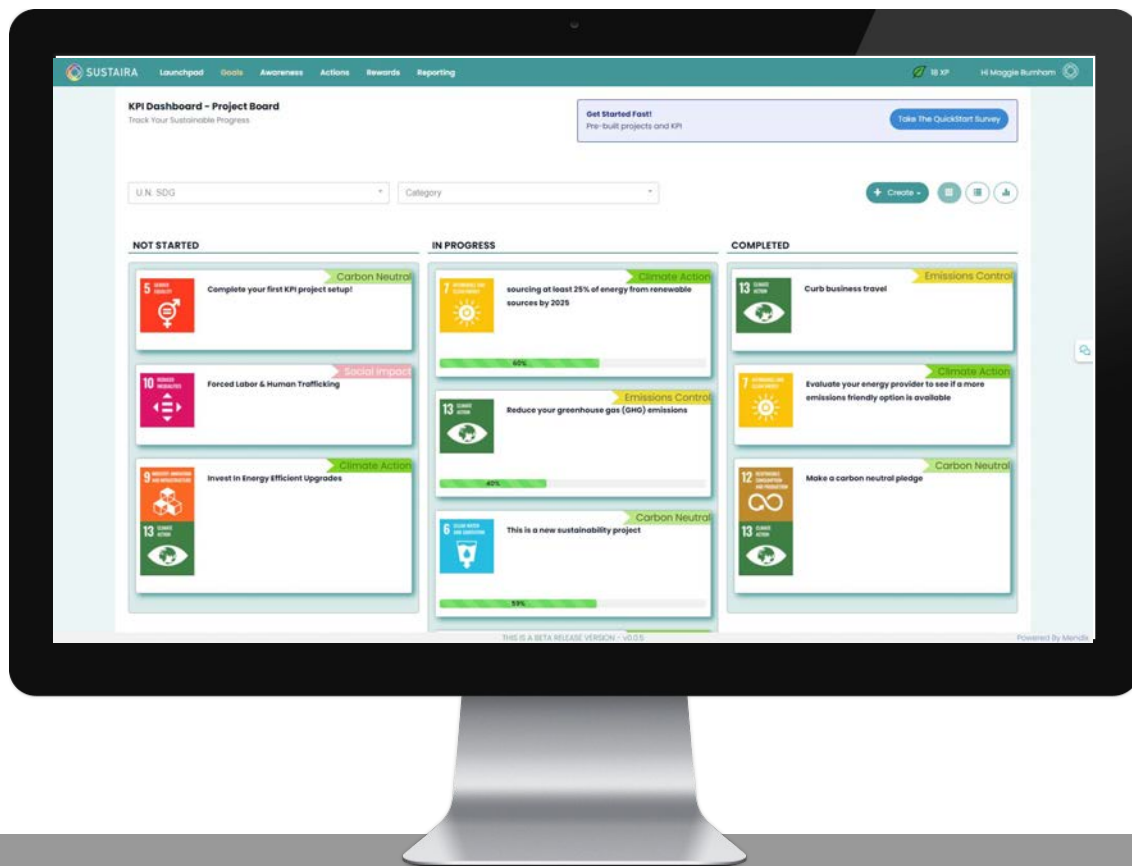


# Demo: ESG Reporting Dashboard

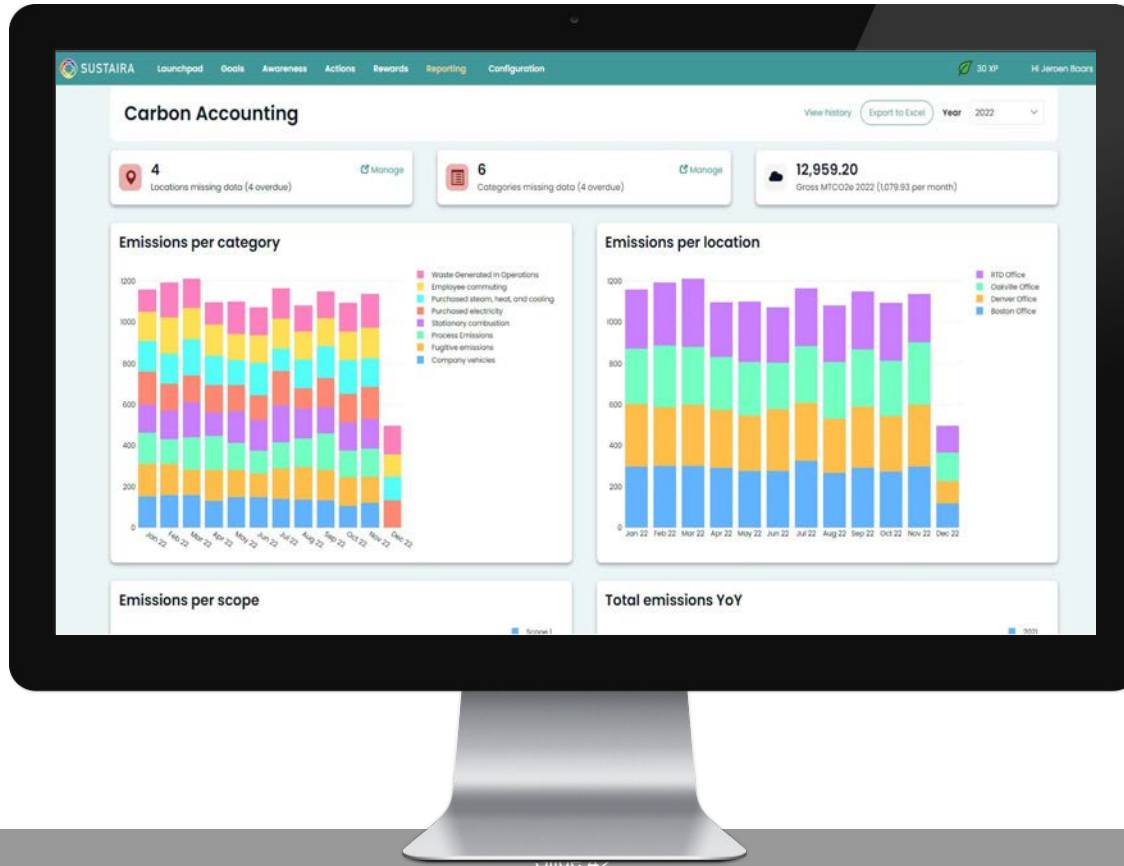




# Demo: Sustainability Goals & KPI Tracker



# Demo: Carbon Accounting (inc Scope 3)



# **Appendix D: Qualtrics EGG Listening Tool**

# Qualtrics EX ESG solution

The **Qualtrics EX ESG solution** is the world's premier ESG sentiment analysis tool, enabling ESG tracking to occur in real-time.

## CROSSXM - IMPROVE BUSINESS PERFORMANCE AND VALUE (CIO/CEO)

### Needs:

Single view of key stakeholders (employees, consumers and customers) all in one place (XM ESG Score, CX, EX, BX ESG scores and drivers)

### EX - Win the war for talent (CHRO)

#### Needs

Understand and act on how employees perceive the organization performs on ESG factors

Win over new talent

Understand what matters most to retain current employees

Demonstrate ESG compliance to stakeholders

### BX - Increase brand awareness and value (CMO)

#### Needs

Understand how the market perceives your ESG practices

Sustain brand positioning and improve trust

Understand which ESG factors are having the biggest influence on brand perception

Demonstrate ESG compliance to stakeholders

### CX - Improve customer loyalty (CDO/HoCC)

#### Needs

Understand how customers perceive your ESG credentials

Demonstrate a commitment to sustainability, differentiating yourself in a crowded market

Understand what matters most to customers

Demonstrate ESG compliance to stakeholders

## XM Platform - Accelerate purpose-built solutions

### Needs

Consistent ESG approach including benchmarks with demographic cuts (including under represented groups segmentation for journey analytics), and driver industry specific data

Qualtrics  
**EXM** methodology™

### ESG XM Solutions

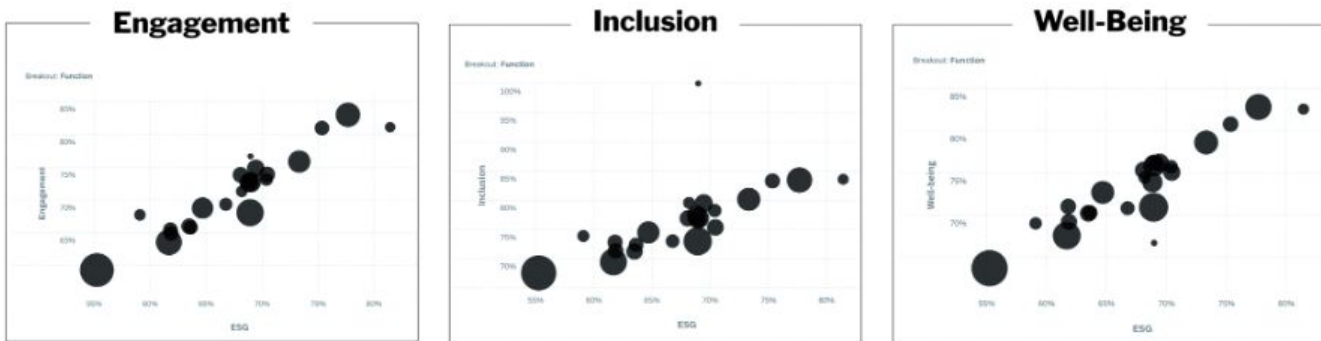
XM Scientist validated  
measurement tools (ESG  
KPIs + Drivers)



# Champion of “S” data

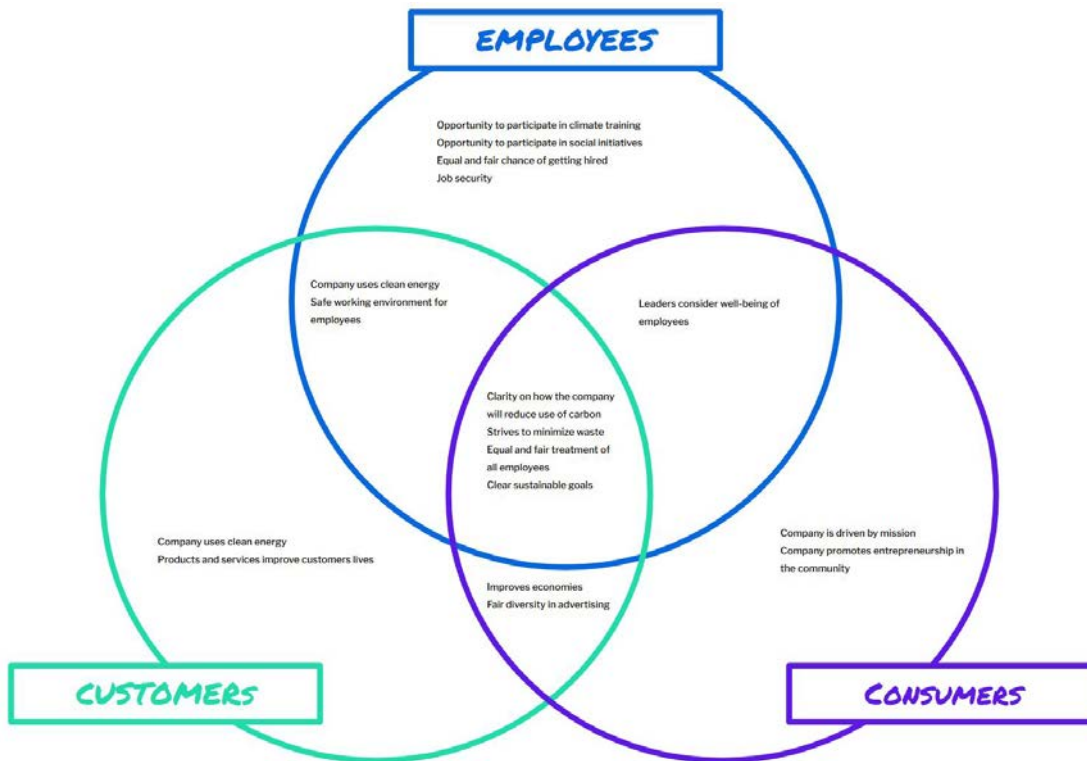
The Qualtrics EX ESG solution enables organisations to investigate employee perceptions of performance in relation to key ESG factors, particularly in the “S”:

1. Learn how your employees perceive the organisation’s performance in key ESG areas.
2. Determine what is most important to your employees and learn how ESG performance affects the employee experience.
3. Determine key focus areas for improvement.



\* Data from Qualtrics ESG research 2022

# Understanding Key drivers per Stakeholder



# Focus attention on key action areas

## **Q) This company's business practices improve the economies of the communities in which it operates**

### Why it's important

Boosting the economy of the local community helps to boost employment, income in the community, and general local facilities.

### Decisions to inform

- Amount of community investment the company is committed to making
- The wages of employees
- Financial assistance taken from the government
- Commitment to employment number
- Commitment to keep turnover below a certain percentage bracket

### Connected ESG Metrics

- Direct economic value generated and distributed
- Financial assistance received from the government
- Absolute number and rate of employment
- Total number and rate of new employee hires during the reporting period, by key demographics
- Total number and rate of employee turnover during the reporting period, by key demographics

## **Q) This company uses clean energy sources to power its operations**

### Why it's important

By using renewable energy, air pollution is decreased because there are no greenhouse gas emissions from fossil fuels.

### Decisions to inform

- Consider current emissions and use of alternative energy sources to power operations i.e. solar-powered technology, wind power, reused water processing technology

### Connected ESG Metrics

- Air pollution
- Impact of air pollution

## **Q) This company is driven by mission more than profit**

### Why it's important

A mission-driven strategy enables businesses to function with clarity and focus while also providing value to stakeholders.

### Decisions to inform

- The company's stated purpose is to create value for all stakeholders, including shareholders as well as the community.

### Connected ESG Metrics

- Performance criteria related to objectives for the environmental, social and governance objectives stated in the company's strategy



# Key Benefits

The Qualtrics EX ESG solution provides the following key benefits:

- **Understand** — in one place — how your organization is performing on each of the key targets from the perspective of your employees, customers, and consumers
- **Learn** what drives ESG perception and what matters most to your employees, customers, and consumers
- **Find out** how you stack up against other organizations
- **Identify** the most significant actions that will help bring about genuine change and contribute towards sustainability and overall improvements.



Qualtrics listening tools form the foundation of future ESG success by providing real-time sentiment analysis both internally (i.e. employees, suppliers, partners) and externally (customers, consumers, community).



# Key Listening Tool

The Qualtrics EX ESG solution is the key [listening tool](#) can understand the perspectives of all key stakeholders - their employees, customers, and consumers. Particularly from an “S” perspective, Qualtrics provides globally leading capability across diversity, inclusion, well-being to equity, professional development, and more.

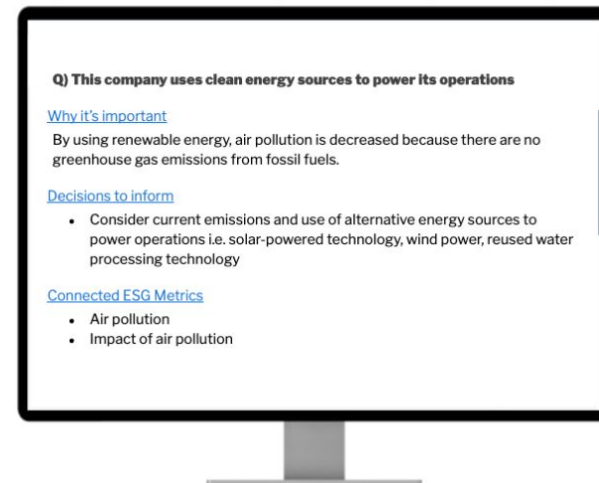


# Collecting ESG Feedback from Key Stakeholders

A smartphone screen displaying the Qualtrics EmployeeXM survey interface. At the top, the URL 'exproductscience.az1.qualtrics.com' is visible. Below the URL is a dropdown menu set to 'English - United Kingdom'. The survey text reads: 'This company fosters environmentally friendly practices (e.g. recycling, paperless culture, saving energy)'. Below the text are four radio button options: 'Strongly disagree', 'Disagree', 'Neither agree nor disagree', and 'Agree'. A blue arrow button is at the bottom right.A smartphone screen displaying the Qualtrics CustomerXM survey interface. At the top, the URL 'exproductscience.az1.qualtrics.com' is visible. Below the URL is a dropdown menu set to 'English - United Kingdom'. The survey text reads: '[INSERT COMPANY] fosters environmentally friendly practices, like recycling and saving energy.' Below the text are five radio button options: 'Strongly disagree', 'Disagree', 'Neither agree nor disagree', 'Agree', and 'Strongly agree'. A blue arrow button is at the bottom right.A smartphone screen displaying the Qualtrics BrandXM survey interface. At the top, the URL 'exproductscience.az1.qualtrics.com' is visible. Below the URL is a dropdown menu set to 'English - United Kingdom'. The survey text reads: '[INSERT BRAND] fosters environmentally friendly practices, like recycling and saving energy.' Below the text are five radio button options: 'Strongly disagree', 'Disagree', 'Neither agree nor disagree', 'Agree', and 'Strongly agree'. A blue arrow button is at the bottom right.

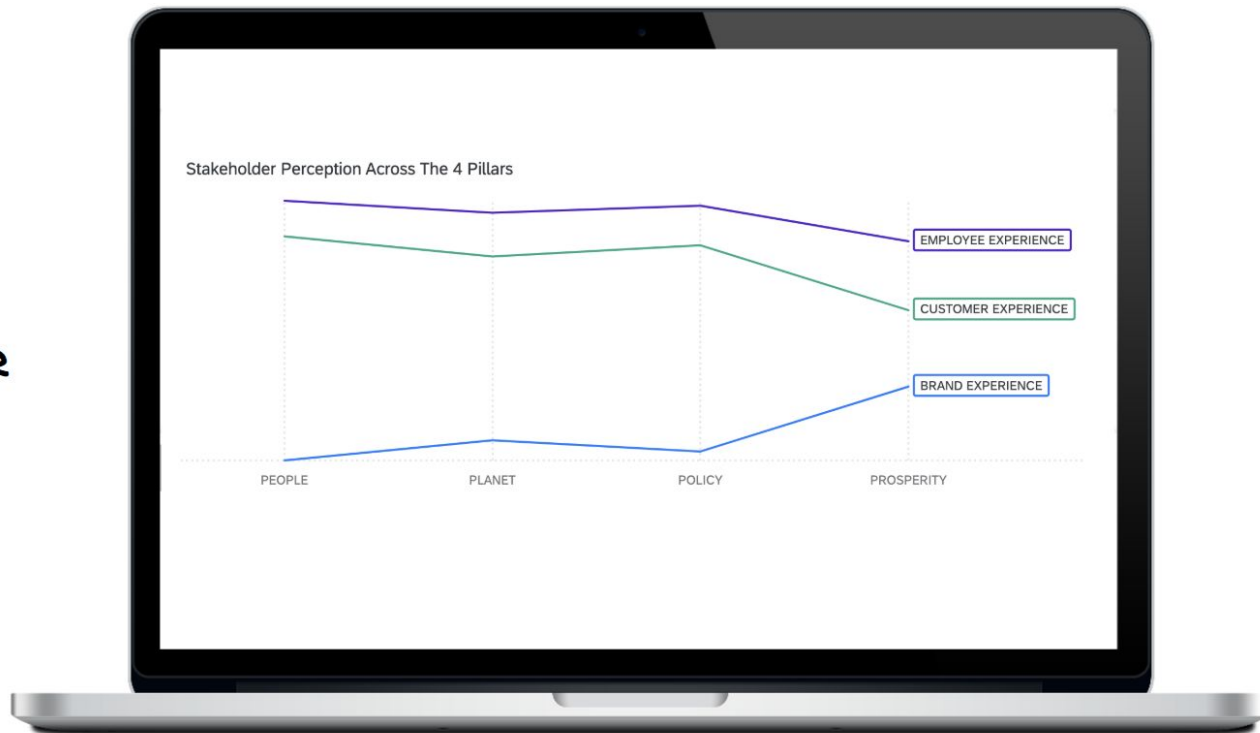
## ACT

### ....On connecting the results to change



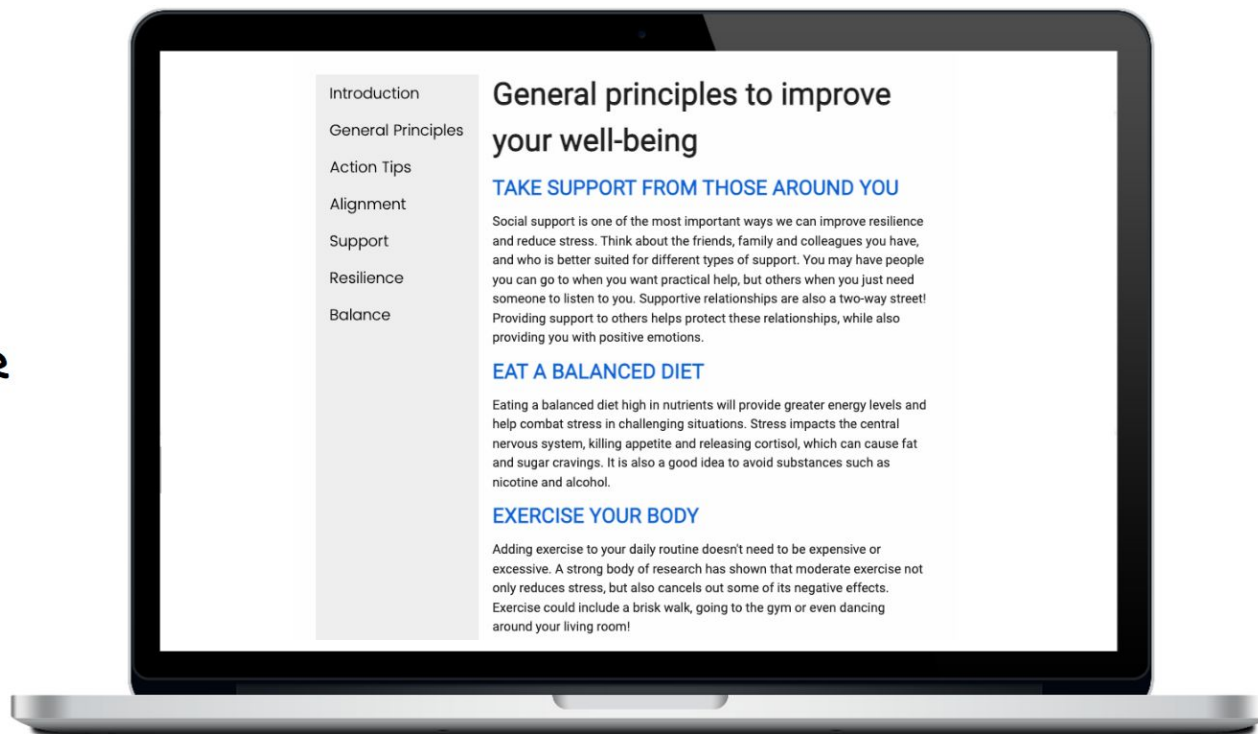
# Understanding Key Stakeholder sentiment

**UNDERSTAND HOW  
PERCEPTIONS OF  
DIFFERENT STAKEHOLDER  
GROUPS COMPARE**



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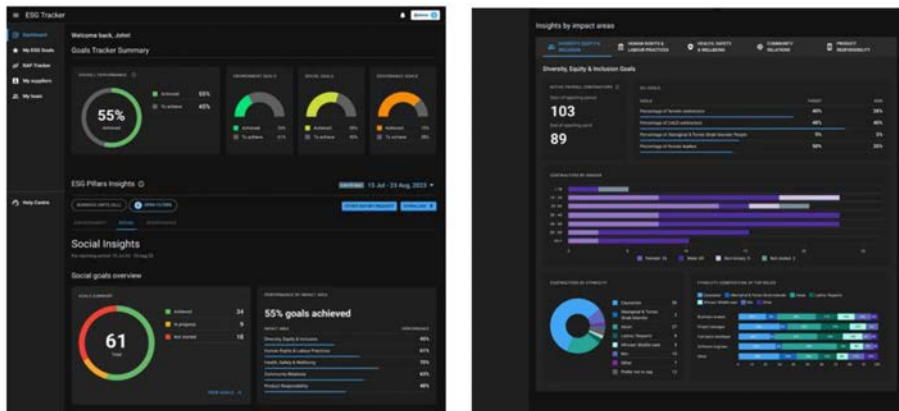


# **Appendix E:**

# **Case Studies**

# The Aquarium Professional Services

In partnership with The Aquarium Professional Services, EquiBlend developed an ESG Strategy for The Aquarium and also developed a Tracker as an add-on service as part of the Aquarium Portal platform upon which their payroll services are delivered.



The ESG Tracker delivers reporting capability in compliance with global sustainability standards such as ISSB(IFRS), GRI, SASB and TCFD

**In a world first**, this system is integrated in with a separately developed RAP tracker to keep track of RAP spend and integrates and can be used to draft and track the goals and objectives of any RAP at any stage. Both systems are integrated to provide an end-to-end view regarding the achievement of RAP initiatives and how they contribute to overall ESG achievement.

# Clean Energy Regulator

The Clean Energy Regulator (CER) is the Government body responsible for administering legislation that will reduce carbon emissions and increase the use of clean energy. We worked with CER to implement the design of a Guarantee of Origin (GO) scheme - an internationally aligned assurance scheme being designed to track and verify emissions associated with hydrogen and renewable electricity made in Australia.

- Project GO provides CER with substantial carbon capture and storage, domestically and to the world.
- Project GO supports the growth of low-emissions manufacturing in Australia and help us meet our national emissions reduction targets while also boosting development of Australia's carbon market.
- Over time, it could expand to include a range of products such as metals, low emissions fuels and other products made in Australia.
- This will help decarbonise the Australian economy by encouraging sellers to reduce carbon intensity. Increasing transparency for consumers will give participating sellers a competitive advantage in the Australian and international market.

Key deliverables included:

- Participant & User research
- Scheme blueprint
- Solution architecture map
- Delivery roadmap





# East London NHS Foundation Trust (ELFT)

**Objective:** Embed social value in procurement processes to support community health and wealth.

**Approach:** Dr. Daniel Fujiwara applied a social value framework to improve procurement practices, achieving a 30% increase in supplier diversity and a 25% reduction in carbon emissions.

**Outcome:** Provided insights into how social value priorities were applied in procurement processes and how suppliers implemented these priorities effectively.

## High-Level Metrics:

- **Living Wage Compliance:** Percentage of suppliers paying the Real Living Wage.
- **Local Economic Investment:** Proportion of spend retained in local economies.
- **Employment Opportunities:** Number of equal employment and training opportunities created.
- **Sustainability Commitment:** Reduction in carbon emissions by suppliers.
- **Youth Support:** Number of young workers, school leavers, and apprentices supported.

**Reference:** Dr. Daniel Fujiwara [A process evaluation of social value in procurement](#)



# Building Digital UK (BDUK)

**Objective:** Assess the impact of subsidised superfast broadband on subjective well-being (SWB).

**Approach:** Dr Daniel Fujiwara conducted an analysis highlighting the benefits of superfast broadband on subjective well being in the UK.

**Outcome:** The study found that subsidised access to superfast broadband significantly improved subjective wellbeing, highlighting the broader social value of broadband infrastructure investments, extending beyond economic metrics to encompass improvements in quality of life and community resilience.

## High-Level Metrics:

- **Wellbeing Value:** The average wellbeing uplift was estimated at £222.25 per year for premises where subsidised broadband was made available. This benefit grew to £469 per month for those who actively adopted the service.
- **Age-Specific Findings:** Younger age groups derived the most wellbeing benefits, reflecting their higher engagement and reliance on digital connectivity. Middle-aged users (36-64) reported lower wellbeing, possibly due to adjustment costs or indirect usage benefits for other household members.
- **Strategic Insights:** Wellbeing benefits were strongest for frequent internet users, suggesting that the programme's impact may grow over time as internet adoption and use increase.
- **Financial Context:** The estimated wellbeing uplift exceeded the average monthly cost of broadband, indicating strong social returns on the investment.

**Reference:** Dr. Daniel Fujiwara, [Subjective Wellbeing Analysis of the UK Superfast Broadband](#)

**Objective:** Quantify the well-being impact of health and workforce initiatives.

**Approach:** Professor Paul Dolan measured workforce wellbeing initiatives, resulting in a 20% increase in employee engagement and a 25% reduction in turnover.

**Outcome:** Demonstrated the financial and social benefits of well-being investments.

## High-Level Metrics:

- **Employee Engagement Index:** Workforce satisfaction improvements.
- **Turnover Reduction Rate:** Savings from decreased attrition.
- **Wellbeing ROI:** Financial returns from mental health programs.

**Reference:** Dr. Daniel Fujiwara & Professor Paul Dolan [Developing an Approach to Valuing Mental Health](#)



# Stonehenge

**Objective:** Assess the societal benefits of cultural preservation for local and international stakeholders to account for project value missed by traditional methods. Without an increase in valuation, the project ran the risk of not obtaining Development Approval (because the economic valuation was too low).

**Approach:** Dr. Daniel Fujiwara applied non-use valuation methods (i.e. measuring cultural preservation projects, strengthening community trust and increasing regulatory goodwill)

**Outcome:** Significantly increased the total infrastructure valuation of the project by adding previously unaccounted value (i.e. quantified social value of cultural investments) which led to the Development Application for the tunnel being approved.

## High-Level Metrics:

- **Cultural Engagement Score:** Increased community involvement.
- **Regulatory Support Index:** Improved stakeholder relations.
- **Economic Impact Growth:** Measurable financial returns from cultural preservation.

**Reference:** Dr. Daniel Fujiwara [Stonehenge Tunnel Project: Valuing Cultural Assets](#)



# Department for Work and Pensions (DWP), UK

**Objective:** Incorporate economic and social impacts into cost-benefit analysis of employment programmes to enhance policy appraisal methods.

**Approach:** Dr. Daniel Fujiwara designed a Social Cost-Benefit Analysis Framework in collaboration with the DWP. The framework integrates traditional economic metrics with non-economic outcomes such as social well-being, offering a more holistic approach to policy evaluation and decision-making.

**Outcome:** The framework improved policy appraisal processes by including societal impacts, enhancing transparency and accountability in evaluating employment programme benefits, and providing a replicable model for embedding social value into government frameworks.

## High-Level Metrics:

- **Economic Impact Assessment:** Quantified financial returns on employment programme investments.
- **Social Impact Measurement:** Evaluated improvements in societal well-being and quality of life.
- **Policy Alignment:** Ensured alignment with government objectives for social and economic development.

**Reference:** Dr. Daniel Fujiwara [DWP Social Cost-Benefit Analysis Framework - GOV.UK](https://www.gov.uk/government/publications/dwp-social-cost-benefit-analysis-framework)



Department  
for Work &  
Pensions



# Historic England

**Objective:** Investigate the relationship between heritage participation and wellbeing.

**Approach:** Conducted studies to assess how engagement with heritage sites affects individual and community wellbeing.

**Outcome:** Found positive associations, suggesting that heritage investments yield significant social and economic benefits.

## High-Level Metrics:

- **Heritage Engagement Rate:** Increased participation in heritage-related activities.
- **Wellbeing Index:** Improvement in individual and community satisfaction levels.
- **Economic Uplift:** Contributions of heritage investments to local economies.

**Reference:** Dr. Daniel Fujiwara [Heritage and Wellbeing](#)



Historic  
England

# Everton Football Club's Community Programme

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**Reference:** Dr. Daniel Fujiwara [A process evaluation of social value in procurement](#)



# Lendlease



**Objective:** Establish a consistent framework to measure social value across global construction projects.

**Approach:** Dr. Daniel Fujiwara collaborated with Lendlease to understand the company's social value objectives. This involved conducting workshops with senior and middle-level stakeholders to define social value within the organisation and identify pathways through which Lendlease impacts society. The framework incorporated project-specific metrics, contextual baseline metrics, and business unit-specific metrics.

**Outcome:** The developed framework enabled Lendlease to monitor social value creation at both project and firm-wide levels, ensuring alignment with their social impact goals.

## High-Level Metrics

- **Project-Specific Metrics:** Indicators tailored to individual projects to assess direct social impacts.
- **Contextual Baseline Metrics:** Benchmarks to evaluate social value relative to local contexts.
- **Business Unit-Specific Metrics:** Measures to assess the performance of different business units in generating social value.

**Reference:** Dr. Daniel Fujiwara [Social Value Framework for Property Development](#)