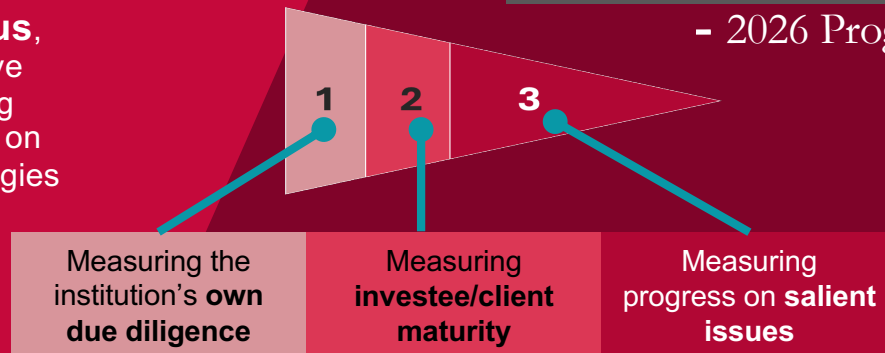


# Shift

## SOCIAL MEASUREMENT TRAINING for Financial Institutions

- 2026 Program -

Build your social indicators with us, through an interactive series of four training workshops focusing on measurement strategies in three domains:



Financial institutions need to develop metrics and indicators to meaningfully measure and report on progress against prioritized social issues. Building on Shift's successful 2025 Social Measurement deep dive clinic for financial institutions, in 2026 we are extending a **condensed version as a training program** to more participating practitioners. Over the course of four two-hour virtual workshops over two months, participants will learn and apply key design principles for social metrics and indicators and begin **building robust measurement strategies for social priorities**, working alongside and learning from peers and Shift experts.

### WHAT TO EXPECT

Learn about peers' approaches across the three measurement domains, and emerging challenges and insights.

Gain insight into design principles that underpin effective metrics and indicators, focusing attention on the corporate behaviors and practices that shape outcomes for people.

Work alongside peers to apply and troubleshoot approaches to measuring progress on a specific salient impact of relevance to your portfolio.

Shape the social performance measurement field by helping to inform expectations for insightful social performance measurement for business and financial institutions.

### PROGRAM OVERVIEW

#### UPSKILLING ON OUTCOMES-FOCUSED DESIGN

**PRINCIPLES:** Participants will develop skills to critically analyze existing indicators for insight about outcomes for people and build capacity to apply guardrails and guidelines for more effective indicator design.

#### APPLYING A CONSISTENT METHODOLOGY FOR SPECIFIC

**SALIENT RISKS:** Participants will work through developing a robust methodology to measure risk or impact related to a priority social risks including living wage, land rights and community engagement, and occupational health and safety.

#### ASSESSING THE MATURITY OF SOCIAL RISK

**MANAGEMENT SYSTEMS:** Participants will learn how they can use human rights due diligence maturity to drive insight for their leverage efforts.

#### CONVENIENT FORMAT AT ACCESSIBLE COST:-

Four focused training workshops over two months combine 8 hours of key content and peer interactions, from Sept – Nov 2026. The fee for participation in the training is USD\$2,500 per individual. Two bonus "ask me anything" sessions offer additional opportunities for insight.

# Shift

## DETAILED PROGRAM & TIMELINE:

1

### WORKSHOP 1: DESIGN PRINCIPLES (Late September 2026)

- Building on intake insights from participants, we will identify common deficiencies and pitfalls in current approaches to social performance measurement and introduce a series of design guidelines to inform better indicator design. We'll also look for encouraging examples of good measurement practices, including hearing from a financial institution with experience in creating human rights-related indicators.
- Participants will explore the business case for better measurement of social risks and impacts.

2

### WORKSHOP 2: FOCUSING YOUR MEASUREMENT EFFORTS (Early October 2026)

- Shift will introduce three measurement domains to help institutions organize their measurement objectives and participants will review examples of maturity frameworks as a useful approach to assessing capacity to identify and manage social risks.
- Shift will share an approach to indicator design that joins root cause analysis with a theory of change framework.
- Participants will examine concrete measurement examples related to living wage, land rights and community engagement, as well as occupational health and safety, to sharpen skills in identifying strengths and weaknesses of measurement approaches.

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### WORKSHOPS 3 & 4: PUTTING IT INTO PRACTICE (November 2026)

- Participating institutions will make brief presentations about their progress in developing measurement approaches and indicators for a priority issue.
- Shift and peers will offer a sounding board to help brainstorm around challenges and opportunities.
- The group will discuss what further types of measurement support are needed in the public domain for financial institutions generally, including challenging issues such as attributing positive outcomes to financial institution leverage.

BONUS

### OPTIONAL BONUS SESSIONS: "ASK ME ANYTHING" (October & November 2026)

- As participants begin to apply what has been explored in the first two workshops to their specific issues of interest, Shift's measurement experts will be available to answer questions and help participants troubleshoot key challenges. Two optional sessions of up to 90 minutes each will allow participants to access Shift expertise to address their own measurement questions, in addition to learning from their peers' questions and experiences.