

Shift

Shaping the standards, incentives
and practices that advance business
respect for human rights

Social Measurement Training

For Financial Institutions 2026

Build your social indicators with us, through an interactive series
of four workshops over two months focusing on measurement
strategies in three **dimensions**:



Dimension 1

Measuring social
performance in your
own operations.



Dimension 2

Measuring social
performance of your
clients or investees.



Dimension 3

Measuring progress
on specific impacts
and risks.

Designing **EFFECTIVE INDICATORS** for measuring progress on key social issues,
such as living wages, occupational health and safety and community engagement.

Over four two-hour workshops financial institutions will work alongside peers to
develop indicators measuring the effectiveness of steps taken to address human
rights impacts connected to their own operations, those of clients or investees.

OUTCOMES



Learn from peers
and Shift experts
on diverse areas of
measurement.



Understand key
design principles
for effective
indicators and
metrics.



Explore Shift's
recent research on
effectively measuring
social performance
across your own
operations, those of
clients or investees.



Gain insight about
measurement in
standards and
regulatory
requirements.



Develop practical
skills you can
apply to strengthen
your social
measurement
approach.

THE SESSIONS

SEPT

WORKSHOP 1: DESIGN PRINCIPLES

- Identify common pitfalls in approaches to social performance measurement.
- Learn about design guidelines and guardrails to improve indicators.
- Hear from Financial Institutions (FIs) who exemplify good practice.
- Explore the business case for better measurement of social impacts.

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WORKSHOP 2: FOCUSING MEASUREMENT EFFORTS

- Learn how to organize your approach to measurement across three dimensions.
- Review examples of "maturity frameworks" which can help FIs measure the progress of clients or investees on key social issues.
- Sharpen ability to spot strengths and weaknesses of different measurement approaches.
- Identify a priority social issue and begin putting insights from the workshops into practice.

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WORKSHOPS 3 & 4: PUTTING IT INTO PRACTICE

- Participants will exchange information about their progress in developing measurement approaches and indicators for their priority issue.
- Shift experts and peers will provide a sounding board to help improve the approach.
- The group will discuss areas where financial institutions could benefit from further support or additional guidance, such as how to measure the positive outcomes that result from FIs using their leverage to encourage better behavior from partners or clients.



INCLUDES TWO (2) ASK ME ANYTHING SESSIONS

Two 90-minute sessions where participants can ask Shift experts
and participating peers for additional suggestions and guidance.

FEES

\$2,500

PER PERSON

The fee includes all workshops,
training materials and two
Ask Me Anything (AMA) sessions.

Group discounts available for
three or more participants.

FOR MORE INFORMATION
OR TO REGISTER CONTACT:



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shiftproject.org



Interactive. Practical. Peer-to-peer.

Strengthen your measurement strategy and drive meaningful social impact.