



SRBP Implementation Mini-Workbook

A Comprehensive Guide to Sustainable and Responsible Business Practices



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Welcome to the SRBP Mini-Workbook A Guide to Sustainable and Responsible Business Practices

This mini-workbook is your hands-on companion for turning values into action. Whether you're just getting started or leveling up your current efforts, this guide will walk you through practical tools to assess where you are, set smart priorities, and build a timeline for meaningful, measurable progress.

SRBP isn't just a checklist; it's a commitment to doing business in a way that uplifts people, strengthens communities, and supports long-term resilience. This workbook will help you connect the dots between strategy and sustainability, between vision and impact.

Let's get to work, because responsible business is good business.

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Why it matters:

Implementing sustainable and responsible business practices (SRBP) requires understanding who your efforts will impact, and who can impact your efforts. That’s where stakeholder mapping comes in.

What it is:

Stakeholder mapping is a visual and strategic exercise that helps you identify, categorize, and prioritize the people, groups, or organizations who have a stake in your mission. This includes funders, community members, staff, government agencies, and even critics.

What you'll do:

In this section, you’ll complete guided exercises to:

- Identify internal and external stakeholders
- Assess each stakeholder’s level of interest and influence
- Determine communication and engagement strategies for each group
- Identify potential champions and potential blockers to your SRBP goals

Why it's useful:

When you know who’s who and where they stand, you can engage stakeholders more effectively, build stronger alliances, and reduce friction—making your SRBP implementation more inclusive, strategic, and impactful.

Exercise 1A: Identify Your Key Stakeholders

List all stakeholders who have influence over or are affected by your organization's operations:

Internal Stakeholders:

- ☐ Board of Directors
- ☐ Executive Leadership
- ☐ Staff/Employees
- ☐ Volunteers
- ☐ Other: _____

External Stakeholders:

- ☐ Donors/Funders
- ☐ Grant-making Organizations
- ☐ Beneficiaries/Service Recipients
- ☐ Community Partners
- ☐ Government Agencies
- ☐ Media
- ☐ General Public
- ☐ Other: _____





Exercise 1B: Stakeholder Influence & Interest Matrix

For each stakeholder group, rate their level of influence (1-5) and interest (1-5) in SRBP initiatives:

Stakeholder Group	Influence Level (1-5)	Interest Level (1-5)	Priority Category
Board of Directors			
Major Donors			
Staff			
Volunteers			
Beneficiaries			
Community Partners			

Priority Categories:

- High Influence/High Interest: Manage Closely
- High Influence/Low Interest: Keep Satisfied
- Low Influence/High Interest: Keep Informed
- Low Influence/Low Interest: Monitor



Exercise 1C: Stakeholder SRBP Expectations

For your top 3 to 5 priority stakeholders, identify their specific SRBP expectations:

Stakeholder SRBP Expectations	
Stakeholder 1:	
• Transparency & Communication	
• Ethical Fundraising & Spending	
• Partnership Integrity & Accountability	
• Community Engagement Practices	
Stakeholder 2:	
• Transparency & Communication	
• Ethical Fundraising & Spending	
• Partnership Integrity & Accountability	
• Community Engagement Practices	
Stakeholder 3:	
• Transparency & Communication	
• Ethical Fundraising & Spending	
• Partnership Integrity & Accountability	
• Community Engagement Practices	



Exercise 2A: Environmental Sustainability Assessment

Rate your current performance (1 = Poor, 5 = Excellent):

Resource Management:

- ☐ Energy efficiency measures in place ____/5
- ☐ Water conservation practices ____/5
- ☐ Waste reduction and recycling programs ____/5
- ☐ Sustainable procurement policies ____/5
- ☐ Digital-first operations to reduce paper use ____/5

Environmental Impact:

- ☐ Transportation and travel policies minimize carbon footprint ____/5
- ☐ Office/facility operations follow green building practices ____/5
- ☐ Events and programs incorporate sustainability measures ____/5
- ☐ Partnerships with environmentally responsible vendors ____/5

Environmental Subtotal: ____/45

Exercise 2B: Ethical Governance Assessment

Rate your current performance (1 = Poor, 5 = Excellent):

Transparency and Accountability:

- ☐ Regular financial reporting and audits ____/5
- ☐ Clear conflict of interest policies ____/5
- ☐ Public access to organizational information ____/5
- ☐ Board oversight and accountability measures ____/5
- ☐ Whistleblower protection policies ____/5

Ethical Operations:

- ☐ Code of ethics for all staff and volunteers ____/5
- ☐ Ethical fundraising practices ____/5
- ☐ Responsible use of donor funds ____/5
- ☐ Data privacy and security measures ____/5
- ☐ Ethical partnerships and collaborations ____/5



Governance Subtotal: ____/50



Exercise 2C: Social Responsibility Assessment

Rate your current performance (1 = Poor, 5 = Excellent):

Diversity, Equity, and Inclusion:

- ☐ Diverse representation in leadership and staff ___/5
- ☐ Inclusive hiring and promotion practices ___/5
- ☐ Cultural competency training programs ___/5
- ☐ Accessible programs and facilities ___/5
- ☐ Equitable compensation and benefits ___/5

Community Engagement:

- ☐ Programs directly address community-identified needs ___/5
- ☐ Meaningful community input in program design ___/5
- ☐ Local hiring and procurement when possible ___/5
- ☐ Collaboration with other community organizations ___/5

Staff and Volunteer Wellbeing:

- ☐ Safe and healthy work environment ___/5
- ☐ Professional development opportunities ___/5
- ☐ Work-life balance support ___/5
- ☐ Fair and transparent policies ___/5



Social Responsibility Subtotal: ___/65

Total SRBP Assessment Score: ___/160

Now What? Moving from Assessment to Action

You've just taken an honest look at where your organization stands. Kudos for tackling the assessment head-on. These checklists aren't just a snapshot of your current efforts; they're a roadmap in disguise. By identifying strengths, gaps, and opportunities across your social responsibility and business practices (SRBP), you now have the clarity needed to take focused, strategic action.

As you move into the Priority-Setting Framework section, you'll use the insights from this assessment to:

- Pinpoint what matters most based on urgency, impact, and feasibility
- Align your priorities with your values, goals, and stakeholder needs
- Build momentum with realistic, high-leverage actions

Think of this next step as converting your checklist results into a strategic game plan, because knowing is good, but doing is better.

Exercise 3A: Gap Analysis

Based on your assessment scores, identify your lowest-performing areas:

Top 3 Environmental Priorities:

1. _____ (Current Score: ____/5)
2. _____ (Current Score: ____/5)
3. _____ (Current Score: ____/5)

Top 3 Governance Priorities:

1. _____ (Current Score: ____/5)
2. _____ (Current Score: ____/5)
3. _____ (Current Score: ____/5)

Top 3 Social Responsibility Priorities:

1. _____ (Current Score: ____/5)
2. _____ (Current Score: ____/5)
3. _____ (Current Score: ____/5)



Exercise 3B: Impact vs. Effort Matrix

For each priority identified above, rate the potential impact (1-5) and implementation effort required (1-5):

Priority Initiative	Impact Potential (1-5)	Implementation Effort (1-5)	Priority Level

Priority Levels:

- High Impact/Low Effort: Quick Wins (Start Here)
- High Impact/High Effort: Major Projects (Plan Carefully)
- Low Impact/Low Effort: Fill-in Projects (If Resources Allow)
- Low Impact/High Effort: Consider Dropping



Exercise 3C: Stakeholder Alignment Check

For your top 5 priority initiatives, check alignment with key stakeholder expectations:

Initiative Priorities				
	Aligns with Board Priorities?	Aligns with Donor Expectations?	Aligns with Staff Values?	Aligns with Community Needs?
Initiative 1:				
	Y / N	Y / N	Y / N	Y / N
Initiative 2:				
	Y / N	Y / N	Y / N	Y / N
Initiative 3:				
	Y / N	Y / N	Y / N	Y / N
Initiative 4:				
	Y / N	Y / N	Y / N	Y / N
Initiative 5:				
	Y / N	Y / N	Y / N	Y / N

What’s Next: Turning Priorities into a Real-World Plan

You’ve clarified what matters most, now it’s time to make it happen.

The priorities you identified aren’t just wishful thinking—they’re the foundation of your strategic action plan. As you move into the

Implementation Timeline Templates, you’ll use these priorities to:

- **Map out your next steps** with clear timelines and milestones
- **Assign ownership and resources** to each initiative
- **Create a practical, trackable game plan** for sustainable progress

This section is where your intentions meet execution. You’ll bring your vision to life one ripple, one timeline, one commitment at a time.

Let’s make it real.

Exercise 4A: 90-Day Quick Wins Plan

The **90-Day Quick Wins Plan** helps you kickstart momentum by focusing on achievable, high-impact actions that can be completed in the short term. These wins are designed to build confidence, show visible progress, and engage your team while laying the groundwork for long-term change. Use this plan to prioritize 2–4 strategic actions that are feasible within 90 days, aligned with your priorities, and capable of creating ripple effects across your organization.

Start small. Act smart. Build trust through action.

Initiative Priorities	
Month 1 Focus:	
Week 1-2 Action Items	[]
	[]
	[]
Week 3-4 Action Items	[]
	[]
	[]
Month 2 Focus:	
Week 1-2 Action Items	[]
	[]
	[]
Week 3-4 Action Items	[]
	[]
	[]
Month 3 Focus:	
Week 1-2 Action Items	[]
	[]
	[]
Week 3-4 Action Items	[]
	[]
	[]





Exercise 4B: Annual Implementation Roadmap

The **Annual Implementation Roadmap** helps you zoom out and take a big-picture look at your Year 1 priorities. This is where you map out **3–5 major initiatives** that align with your SRBP goals and set the pace for long-term success. These initiatives should reflect your top priorities from the assessment and priority-setting stages—balancing ambition with capacity. Use this roadmap to sequence key actions, assign accountability, and track meaningful progress across the year.

Think of it as your strategic launchpad: focused, intentional, and built to create lasting impact.

<u>Initiative 1:</u>	
Q1 Milestones:	
Q2 Milestones:	
Q3 Milestones:	
Q4 Milestones:	
Success Metrics:	
<u>Initiative 2:</u>	
Q1 Milestones:	
Q2 Milestones:	
Q3 Milestones:	
Q4 Milestones:	
Success Metrics:	
<u>Initiative 3:</u>	
Q1 Milestones:	
Q2 Milestones:	
Q3 Milestones:	
Q4 Milestones:	
Success Metrics:	





Exercise 4C: Resource Allocation Planning

Before you launch your SRBP initiatives, it's essential to make sure the right resources are in place. This section helps you identify and allocate what you'll need **people, time, funding, tools, and partnership**, to successfully carry out your plan. By aligning resources with your priorities and timeline, you'll reduce friction, increase accountability, and set your team up for success.

Consider this your blueprint for making sure good intentions are backed by real capacity.

Initiative Priorities	
Budget Requirements:	
<input type="checkbox"/>	Staff time allocation: _____ hours/week
<input type="checkbox"/>	Training and development: \$ _____
<input type="checkbox"/>	Technology/systems upgrades: \$ _____
<input type="checkbox"/>	External consulting/support: \$ _____
<input type="checkbox"/>	Materials and supplies: \$ _____
<input type="checkbox"/>	Total estimated budget: \$ _____
Human Resources Needed:	
<input type="checkbox"/>	Project champion/coordinator: _____
<input type="checkbox"/>	Key team members: _____
<input type="checkbox"/>	External partners/consultants: _____
<input type="checkbox"/>	Board/volunteer support: _____
Open Discussion and Wrap-up	
<input type="checkbox"/>	Operating budget reallocation
<input type="checkbox"/>	Restricted grants for sustainability initiatives
<input type="checkbox"/>	Donor-advised funds
<input type="checkbox"/>	Corporate partnerships
<input type="checkbox"/>	Fundraising campaign
<input type="checkbox"/>	Other: _____

You've done it! You've put your SRBP plan in motion, now it's time to track your progress and stay accountable. This section is designed to help you create a simple but effective system to **monitor actions**, **measure impact**, and **evaluate outcomes** overtime. Using the progress track template, you'll be able to identify what's working, what needs adjustment, and how your efforts are contributing to meaningful change.

Think of this as your feedback loop, keeping your strategy dynamic, data-informed, and focused on continuous improvement.

Progress Tracking Template
Monthly Check-in Questions:
<div><div>1. What SRBP initiatives were completed this month?</div><div>2. What challenges did we encounter?</div><div>3. How did stakeholders respond to our efforts?</div><div>4. What adjustments need to be made to our plan?</div><div>5. What support or resources do we need moving forward?</div></div>
Quarterly Assessment:
<div><div>• Reassess SRBP scores in focus areas</div><div>• Gather stakeholder feedback</div><div>• Review budget and resource allocation</div><div>• Adjust priorities and timeline as needed</div></div>
Annual Review:
<div><div>• Complete full SRBP assessment</div><div>• Update stakeholder mapping</div><div>• Set priorities for the following year</div><div>• Celebrate successes and learn from challenges</div></div>
Next Steps Checklist:
<div><div><div>[] Complete all four parts of this worksheet</div><div>[] Share results with key stakeholders</div><div>[] Identify 1-2 quick wins to start immediately</div><div>[] Create detailed action plans for priority initiatives</div><div>[] Establish regular review and monitoring schedule</div><div>[] Communicate SRBP commitment to all stakeholders</div><div>[] Begin implementation of 90-day plan</div></div></div>

The end of the workbook, not the end of the journey

You've completed the SRBP Mini-Workbook! Congratulations! You've assessed your current situation, prioritized your next steps, developed an implementation timeline, and created a plan to measure the impact. That's the foundation of real, sustainable change.

But remember, this is just the beginning. The tools in this workbook are meant to grow with you.

Use them to:

1. Revisit and refine your strategy **regularly**
2. Engage your team and stakeholders in active implementation
3. Adjust your actions based on results and feedback
4. Celebrate your progress and build lasting momentum

Let's Keep the Momentum Going

Don't let this workbook sit on a shelf—put it into action. Integrate it into your planning sessions, use the templates to guide your decisions, and keep the mission of sustainable and responsible business at the heart of your work.

And if you need support, don't go it alone. **Hall Strategic Partners** is here to help.

Whether you're looking for strategic guidance, facilitation, impact measurement, or long-term partnership, we're ready to walk with you every step of the way.

Reach out at helloTobey@hallstrategic.com to schedule a free consultation or learn more about how we can support your SRBP journey.

You're building more than a business, you're building a legacy. Let's make it count.



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