B Impact Assessment Addendum for Education Product and Service Providers

This addendum is intended to supplement the B Impact Assessment with targeted questions and practices to measure education products and services providers' unique social impact. The questions in this addendum are designed to allow users to self-complete and evaluate their impact as well as provide actionable best practices for companies to model themselves after.

The addendum is intended for companies whose product or service's principal focus is the improvement of educational experiences and outcomes of learners, but the method of delivery to achieve that outcome might vary greatly. Products designed for use by learners, instructors, administrators and parents/guardians may be included, as long as those products are designed to ultimately improve the educational experience and success of a learner. Learners could be in traditional or alternative education settings at any level, including continuing education. Companies that may have an educational mission but are not in the education industry such as business consultants, eco-tourism providers, etc., will not fall within the scope of the assessment.

Question Categories and Topics

Business Model and Engagement
(7 questions)
- Markets served
- Level/pipeline portion served
- Target of services
- Method of delivery

Quality and Continuous Improvement
(6 questions)
- Needs Based Development
- Quality assessment
- Performance Targets
- Satisfaction
- Product Implementation and Support

Outcomes
(7 questions)
- Direct and Indirect Outcomes
- Percentage of users with successful outcomes
- Measurement and Verification
- Outcomes for In Need Groups
- Long-term success

Transparency
(2 questions)
- Marketing Claims
- Availability of performance information

Privacy and Protection of Data
(6 questions)
- Collection and use of data
- Data protection
- Procedures in the event of data breach or company sale
- Commitments to privacy
- Privacy disclosures
- Physical protection of customers

Scoring

The education addendum is designed to match the scoring of the B Impact Assessment, with a total of 60 points available, and 30 points reserved for those

products and services that are particularly serving special interest populations that are traditionally underserved or in need.

The scores of each topic above are broken down as:

Business Models and Engagement	-
Quality and Continuous Improvement	12
Outcomes	10
Transparency	3
Privacy and Protection of Data	5
Serving Special Interest Populations	30*

*Serving Special Interest Populations points are calculated based on the percentage of special interest populations served and multiplied by points earned in various other questions in the assessment.

Business Model and Engagement

B-1. *Please indicate the target user(s) of your primary product or service. Check all that apply.**
    ☐ Learners
    ☐ Instructors/professional personnel
    ☐ Administrative personnel
    ☐ Parents/guardians of students attending
    ☐ Other (please describe)

B-2. *Please indicate the education level targeted by your primary product or service. Check all that apply.**
    ☐ Pre-K education level/institution
    ☐ Primary education level/institution
    ☐ Secondary education level/institution
    ☐ Postsecondary education level/institution
    ☐ Other education settings

B-3. *Please provide a brief description of your product or service, who the users are, how it is delivered or accessed and how it is paid for and priced.***

B-4. *Please indicate the number and type of users your product or service serves.***

B-5. *If applicable, what percentage of your users belong to a special interest population?**

[Special interest populations are groups that are traditionally underrepresented or underserved. See "Explain This" for a definition and examples. This question will factor into weighted questions later in the addendum. Answer only based on specific groups that are tracked and can be verified.]

B-6. *If applicable, what group would qualify as the primary special interest population served?***

B-7. If applicable, *what percentage of your users identify as the following race/ethnicity groups? **

White	Asian	Black	Hispanic	Native American or Alaska Native	Other

Quality and Continuous Improvement

Q-1. *How are the specific needs of users incorporated into the development of your product/service? Check all that apply.****
- ☐ Company employs members of targeted user groups to incorporate needs of users during development
- ☐ Subject matter experts or professionals with experience in the field relevant to the purpose of the product or service are used or consulted
- ☐ Company conducts surveys and/or focus groups of potential customers and/or users
- ☐ Company pilot tests product or service prior to release
- ☐ Research on needs of users or communities is reviewed and integrated into development
- ☐ The needs of the local community where the product or service is offered is assessed
- ☐ State or national needs (e.g., need for STEM graduates) are assessed
- ☐ Specific needs of target special interest populations to inform design of the product are assessed
- ☐ Other (please describe)
- ☐ None of the above

Q-2. *How does your company assess the quality, effectiveness and/or impact of your product or service delivery? Check all that apply.****
- ☐ Measuring outcomes against industry benchmarks or state or national metrics (e.g., college-going rate)
- ☐ Measuring outcomes in comparison to customers with similar characteristics (e.g., socio-economic)
- ☐ Hiring an independent, third party entity to assess product or service
- ☐ Soliciting and evaluating customer feedback or satisfaction
- ☐ Other (please describe)
- ☐ We do not have a plan in place to assess our product or service

Q-3. *Has your company set specific targets for product performance/outcomes?****
- ☐ Yes, company has set specific goals for satisfaction or similar targets
- ☐ Yes, company has set specific goals for outcomes
- ☐ Yes, company sets targets collaboratively with partners or clients
- ☐ No, we have not set performance targets

Q-4. *How do you use the information gathered during the processes described previously to improve your product or service?***

Q-5. *If satisfaction or a net promoter score is assessed for your product(s), what are the satisfaction rates or overall score?****

	Satisfaction	Net Promoter Score
☐	0 or below	
☐	1-24%	1-15
☐	25-49%	16-24
☐	50-74%	25-49
☐	75-100%	50+
☐	N/A (not tracked)	

Q-6. *What support services does your company offer (directly or through partnerships) to ensure impactful implementation of your product/service? Check all that apply.****

- ☐ Project management for customers throughout implementation and deployment, including assistance to create comprehensive launch strategy
- ☐ Set-up and customization support
- ☐ Face-to-face user training or professional development
- ☐ Free ongoing, individualized customer support and training
- ☐ Ongoing individual customer support and training provided for an additional charge
- ☐ Manage hosting of service
- ☐ Other (please describe)
- ☐ No additional implementation or deployment services offered
- ☐ N/A

Outcomes

O-1. *What are the intended outcomes of your company's product or service, and how does your company measure successful outcomes?***

O-2. *Which of the following options best describes the outcomes of your product or service?** (Your answer to this question will determine which of the following questions should be answered.)
- ☐ Product or service leads to direct improvement of learner performance, for example: improvement in student performance in traditional educational settings, learning or skill building outside of the classroom, alternative certification, portability of learning [Answer O-3a.]
- ☐ Product or service supports users in ways that could indirectly improve learner performance, such as improved efficiency, cost of education, financial aid, instructional or curricular aids, student engagement, improved data or data use [Answer O-3b.]

O-3a. *Please indicate the percentage of learners demonstrating direct, material positive change as described in your previous response.****

O-3b. *Please indicate the percentage of material positive outcomes and, if known, the percentage of indirect outcomes on learner performance. ****
- Initial (non-learner performance) outcome of product or service, e.g. improved instruction, lower cost, etc.
- Impact on learner performance as a result of product or service

O-4. *Does your company track or measure successful outcomes of your product/service in any of the following ways?****
- ☐ In depth case studies
- ☐ Self-conducted outcomes studies across all users
- ☐ Independently verified outcomes studies across all users
- ☐ Other (please describe)
- ☐ None of the above

O-5. *If applicable, describe how your outcomes have been independently reviewed and/or validated.***

O-6. *Are the success rates of your special interest population outperforming the rates of that population as a whole?****
- ☐ Yes, verified by a third party
- ☐ Yes, not verified by a third party
- ☐ No
- ☐ Not applicable, company does not have those data

O-7. *Do you track and measure longer-term outcomes for users after completion to ensure continued success?****
- ☐ Yes, longer term outcomes are independently measured and/or verified
- ☐ Yes, company tracks longer term outcomes on its own
- ☐ Yes, outcomes demonstrates that they are more likely to have continued success compared to non-users
- ☐ Students are not tracked after use of product or service
- ☐ Company is too new to have this data/to be able to track data

Transparency

T-1. *Which of the following are true with regard to the company's marketing claims? Check all that apply.****

- ☐ Product or service does not assess user expectations and performance with respect to marketing claims
- ☐ Ongoing satisfaction of marketing claims is assessed during engagement with product or service
- ☐ An external entity independently verifies marketing claims
- ☐ Information about marketing claims satisfaction and/or verification is public and easy to find on company website
- ☐ Product or service has a written and distributed plan to address any discrepancies found between user expectations and performance and marketing claims

T-2. *Does your company make the performance or outcomes of your product or service available in any of the following ways? Check all that apply.****

- ☐ Company provides testimonials or references from current users
- ☐ Case studies or outcomes are available upon request
- ☐ Case studies or outcomes measures are provided to prospective clients
- ☐ Case studies or performance/outcomes are made publicly available
- ☐ Company identifies all sources of outcome results, indicating whether third party verified or not
- ☐ Other (please describe)
- ☐ None of the above

Privacy and Protection of Data

P-1. *Do you collect personally identifiable information of learners or other users, e.g. academic information, testing results, instructor actions?.* *
- ☐ Yes
- ☐ No

P-2. *How do you protect personal information? Check all that apply.* ***
- ☐ Conducting and updating periodically an inventory of all data that require privacy protection and security
- ☐ Regular monitoring and third-party audits of data security, including record maintenance and destruction
- ☐ Utilize appropriate methods to insure data are confidential, e.g., data suppression/encryption
- ☐ Onsite records or technology have physical security control (e.g. locked file rooms)
- ☐ Other (please describe)
- ☐ None of the above
- ☐ Not applicable, company does not collect personal information

P-3. *Does the company have plans or policies in place to protect data in case of breach or company sale? Check all that apply.* ***
- ☐ There is a plan in place to address handling of personal data in the event company ceases to exist or is sold/bought by another entity
- ☐ Company has written response processes set up in case of data breach, including external communications
- ☐ We have practiced our procedures in case of a data breach
- ☐ Other (please describe)
- ☐ None of the above
- ☐ Not applicable, company does not collect personal information

P-4. *Does your company have a written policy regarding any of the following (consistent with the tenets of the Student Privacy Pledge)? Check all that apply.* ***
- ☐ To not sell information to outside entities
- ☐ To not use data to target advertising
- ☐ To use data for authorized education purposes only
- ☐ To not change or modify privacy policies without notice and opportunity to opt out
- ☐ To maintain and enforce limits on data retention
- ☐ To support parental access to, and correction of errors in, their children's information
- ☐ To provide comprehensive security standards
- ☐ To be transparent about the collection and use of data
- ☐ Other (please describe)
- ☐ None of the above
- ☐ Not applicable, product or service is not geared to children under 13 or is a non-profit entity

P-5. *How are your company's privacy clauses and data usage policies disclosed? Check all that apply.* ***
- ☐ Clear and concise user agreement on use of data and disclosures provided to customers separately when signing up for product or service
- ☐ Provided to customers as part of overall set of disclosures

☐ Customers, parents or guardians are required to acknowledge privacy and data policies
☐ Customers and users are notified in writing of changes to data usage policies
☐ Other (please describe)
☐ No disclosures provided
☐ Not applicable, company does not collect or utilized customer-level data

P-6. *If you have a physical location and/or in person interaction with users, how do you ensure the physical safety of users? Check all that apply.****
☐ Employees are subject to background checks as part of hiring process
☐ Products meet industry-specific safety standards
☐ Employees undergo regular safety training and/or further background checks
☐ Safety statistics are made available to all users
☐ All users are made aware of risks
☐ Other (please describe)
☐ None of the above
☐ Not applicable - company does not have physical interaction with users