Politecnico
di Torino

# SYSTEMIC DESIGN TOOLKIT:

## A TOOLKIT TO GUIDE CHINESE SOCIAL ENTERPRISES FOR SELF-TESTING AND IMPROVEMENT THROUGH THE SYSTEMIC DESIGN APPROACH

**SYSTEMIC DESIGN TOOLKIT**
CHINESE SOCIAL ENTERPRISES

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CO-SUPERVISOR: CATERINA ROSINI

CANDIDATE: SHEN SHU

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# 01

# INTRODUCTION

/THEME AND THESIS WORK FRAMING

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# 1.1 THEME AND THESIS WORK FRAMING

The thesis title was proposed to me by Professor Silvia Barbero and PhD student Caterina Rosini. I was confused when I first came across this topic, because I have neither exposure to design toolkit nor social enterprise, but after a very short time learning about social enterprise I chose the topic of the China Social Enterprise Toolkit between this topic and another.

The main reason is that I think social enterprise is an organization full of humanistic care, and I hope to make a little contribution to such an organization that contributes to society. With this in mind, I started from 0 to investigate the two most important contents of this topic: design toolkit and Chinese social enterprises.

I have to admit that I got into trouble shortly after the project started. Social enterprises have a long history of development in Europe, and they have well-established systems and rules. However, what I didn't expect is that social enterprises are a completely new concept in China, and everything is still in the early stages of development. So I couldn't get to the bottom of my research. Fortunately, Professor Barbero and Caterina have given me a lot of help, not only in the project but also in the spirit of the support. I would like to express my gratitude to them.

Although the process was difficult, this topic fascinated me, it gave me the first exposure to the concept of social enterprise, and the opportunity to study it in depth, let me know that there are many people in the world trying to make the world a better place. I was also moved by many successful social enterprise cases and the original intention of choosing this topic was ignited again. I hope that through this topic, I can use the knowledge of system design I have learned to make a design toolkit suitable for Chinese social enterprises to improve and perfect Chinese social enterprises.

# 1.2 DEFINITION OF SOCIAL ENTERPRISE WORLDWIDE



https://www.gsitalia.org/wp-content/uploads/2019/11/social-enterprise.jpg

### What Is a Social Enterprise?

*"A social enterprise or social business is defined as a business with specific social objectives that serve its primary purpose. Social enterprises seek to maximize profits while maximizing benefits to society and the environment, and the profits are principally used to fund social programs."*

Source：*"https://www.investopedia.com/terms/s/social-enterprise.asp"*

The concept of social enterprise was developed in the UK in the late 1970s, it's a concept in the middle ground between non-profit organizations and business enterprises.

The business purpose of social enterprises is not to bring economic returns to shareholders, but to bring social value returns to shareholders. Compared with traditional non-profit organizations, social enterprises are guided by the spirit of enterprise, adhere to the path of social innovation, have self-financing economic autonomy, and do not rely on external donations to survive. While making a profit is not the main motivation behind social enterprises, income still plays an important role in the sustainable development of enterprises. Sustainable income distinguishes social enterprises from traditional nonprofits that rely on outside funding to fulfill their social mission. In a sense, social enterprises can play the role of integrating the resources of non-profit organizations and commercial enterprises. On the one hand, they can bring needed help to groups in need, and they can also help public welfare practitioners improve their salaries, while ensuring their own highly independent.

At present, 22 countries around the world have relatively complete social enterprise certification systems. For example, the official certification body in the United Kingdom - Community Interest Company certification system (Community Interest

Company), independent intermediary organization certification system (SEM social enterprise mark) and industry federation certification system (SEB social enterprise badge), the United States has B Corp Certification under the legal system of various states and the non-governmental organization Benefit Lab (B Lab), South Korea has established a local social enterprise certification service and support system through the "Social Enterprise Incubation Law".

# 1.3  SYSTEMIC DESIGN
## 1.3.1  INTRODUCTION TO SYSTEMIC DESIGN

Over the past few decades, the increased complexity caused by globalization, migration, and sustainability has created recent challenges for design, which has also shifted from a practice aimed at designing things to one that helps solve today's complex societal challenges. To help designers meet these challenges, Systemic Design was born, which combines systemic thinking with human-centered design.
Systemic design is a rapidly evolving field. A number of design schools have begun adopting strategies that focus on systemic design education, including the Faculty of Architecture and Design at the Politecnico di Torino. The Master's Degree in Systemic Design at the Politecnico di Torino aims to train students to combine product-related ecological issues with environmental protection issues, to target zero emissions in the design process, concretize a new economic production model, and ultimately produce a community that is closely related and consciously connected to the territory. The further purpose of the Master's is to promote and deepen a culture of design that places people at the center of their social, cultural, and environmental context, a culture of interest in innovation associated with looking at problems from different perspectives and adopting a multidisciplinary approach to production systems, at the same time, it also pays attention to the design culture of human factors.
The systemic design research at the Politecnico di Torino is now led by Prof. Silvia



Department of Architecture and Design
https://www.dad.polito.it/var/dad/storage/images/media/images/polito_internaz_245m/8841-1-ita-IT/polito_internaz_245m_full.jpg

Barbero, who presents a systemic design methodology in the course, which consists of 5 steps: holistic diagnosis, challenges&opportunities, systemic project, the study of outcomes, and implementation of results.

## 1.3.2  APPLICATION OF SYSTEMIC DESIGN METHODOLOGY

▶  **Holistic Diagnosis**

At the beginning of the project, I conducted an in-depth investigation of Chinese social enterprises and design toolkits at the same time. The data were mainly obtained through a large number of desk studies and were summarized in the form of graphs and words. The holistic diagnosis is divided into two aspects, one is for Chinese social enterprises, and the other is for existing design toolkits. The holistic diagnosis of Chinese social enterprises mainly focuses on the number, regional distribution, and development status of Chinese social enterprises. The holistic diagnosis of the existing design toolkits is to select six representative design toolkits, mainly focusing on their designers, nationality, publication year and other basic information, how the toolkit is used, and its content. All the data in the holistic diagnosis provide a good design basis and reference for the subsequent design of the Chinese social enterprise systemic design toolkit.

▶  **Challenges & Opportunities**

In the investigation of Chinese social enterprises, the current problems faced by Chinese social enterprises are also defined, and then I try to get help from the experience of existing design toolkits to develop guidelines to try to find solutions for Chinese social enterprises. The guidelines are quite based on the framework of the design toolkit to find the best logic and method in continuous attempts.

▶  **Systemic Project**

In this step, I make a design toolkit based on the framework of the guideline, making constant adjustments to the shape, size, and order of the tables to get the best sense

of use. In addition to this, I also did a vi design for the design kit, selected the main color for the table, and made the logo, as well as the user's guide, etc.

▶ **Study of Outcomes**

The output of this project is a new human resource and a new social enterprise structure diagram produced in the China Social Enterprise Systemic Design Toolkit. Chinese social enterprises will redistribute, update or supplement the human resources of social enterprises in the process of using the design toolkit to better save the insufficient human resources of social enterprises and form a network of relationships between human resources.

▶ **Implementation of Results**

In this session, I contacted many Chinese social enterprises and received support from two of them. I invited them to try out the Chinese Social Enterprise Systemic Design Toolkit I made, and then based on their feedback from the trial has been improved several times.

# 1.4  PURPOSE AND STRUCTURE OF THE PROJECT

The purpose of this project is to guide Chinese social enterprises to systematically self-diagnose and improve their human resources and corporate structure through the production of the Chinese Social Enterprise Systemic Design Toolkit so as to strengthen the sustainability of Chinese social enterprises' own development. And achieve better business operations, improve the market competitiveness of Chinese social enterprises, and further promote the overall development of Chinese social enterprises.

# 02

# CONTEXT INTRODUCTION

/DEFINITION OF SOCIAL ENTERPRISE IN CHINA

/THE DEVELOPMENT HISTORY OF CHINESE SOCIAL ENTERPRISES

/CHINESE SOCIAL ENTERPRISE CERTIFICATION

/HOLISTIC ANALYSIS OF CHINESE SOCIAL ENTERPRISES

## 2.1  DEFINITION OF SOCIAL ENTERPRISE IN CHINA

There is not an accurate consensus on the definition of "social enterprise" in China. Some people think that social enterprises are non-profit organizations, some people think that social enterprises are enterprises, and some people think that social enterprises are between non-profit organizations and enterprises. Therefore, social enterprise can be understood as a special kind of enterprise or a special kind of social organization.

However, Chinese scholars have a common understanding of social enterprises, that is, they believe that social enterprises are rooted in social innovation. Although Chinese social enterprises use business operations as their means of survival, they are driven by social missions. It is created by social needs, can grow in economic value creation, can generate social value, and at the same time regard economic performance as a sustainable way of survival, and produces more social value by reinvesting operating income in social undertakings. The core of defining a "social enterprise" is not only to clarify the dividend limit and asset lock-in, but also to clarify its social attributes and purpose, and to focus on solving social problems and promoting social changes.

*(Retrospect and Prospect of China's Social Enterprise Development, Xu Jialiang, He Lijun)*

## 2.2  THE DEVELOPMENT HISTORY OF CHINESE SOCIAL ENTERPRISES

Since the founding of the People's Republic of China, along with the exploration of the path of socialism with Chinese characteristics, several unit system organizations have emerged. Unit is a comprehensive organization that integrates political, economic, and social functions, and performs the functions of social resource allocation, social integration, and social mobilization, this type of organization has the characteristics of some social enterprises. However, unit-based organizations

are clearly different from social enterprises—the former are initiated by the state, while the latter are derived from society. It was not until 2003 that social enterprises were introduced to China as an imported product.

**The development history of Chinese social enterprises can be briefly summarized by the following timeline:**



On August 19, 2019, the first Social Enterprise Research Forum was held in Beijing. The forum released the **"China Social Enterprise Research Institute"**.

The first China Social Enterprise and Social Investment **Forum Annual** Conference was successfully held in Shenzhen and will **be held every year** thereafter

In 2003, the concept of "social enterprise" **appeared for the first time** in the article "Transformation of Non-Profit Organization Operation Mechanism and Public Welfare Efficiency of Social Enterprises" (Shi Lirong), marking the **official beginning** of Chinese social enterprise research.

In 2013, **the first Chinese social enterprise white paper** "China Social Enterprise and Impact Investment Development Report" was released. The birth of this report filled the gap in the social enterprise white paper.

During the 4th China Charity Association in 2015, 7 social enterprises obtained **national social enterprise certification**

In April 2019, Social Enterprise Planet held a Chinese Social Entrepreneur **Training Camp**, dedicated to **cultivating social enterprise talents**, promoting the development of the social enterprise industry, and serving social enterprises.

**2003**  **2006**  **2013**  **2014**  **2015**  **2017**  **2019**  **2020**

On July 16, 2006, former Microsoft China President Wu Shihong and American writer David Bernstein shared the book "How to Change the World: The Power of Social Entrepreneurs and New Ideas". This book become a book of **enlightenment for many social entrepreneurs**. The publication of the book also marked the **beginning of entrepreneurial groups exploring the practice of social enterprises**.

Guangdong Shunde Social Innovation Center initiated the country's **first local social enterprise certification.**

The "Social Innovation Star Chinese Social Entrepreneur **Competition**" started and will **be held every year** thereafter

On June 11, 2017, the "Beijing Initiative for the Development of Chinese Social Enterprises" was released in Beijing. This is an important beginning that everyone has **realized the many challenges** facing the development of social enterprises in China, and has realized **the need for more rigorous theoretical system support**, to form a shared social enterprise big data network.

The **"Social Enterprise Day"** initiative was released at the 2020 China Social Entrepreneur Annual Conference

On September 19, 2020, the first **Online Forum** on Social Entrepreneurship and Social Innovation of Renmin University of China was successfully held

On November 5, 2020, the first **"Cheng Siwei Social Enterprise Development Youth Forum"** was successfully held

## 2.2.1 THE EMBRYONIC ETAGE OF CHINESE SOCIAL ENTERPRISES

The period from 2003 to 2009 was the embryonic stage of Chinese social enterprises. With the increasing advancement of social governance, the functions of social enterprises in employment resolution, welfare services, poverty governance, crime correction, environmental issues and community building have gradually emerged, attracting academic attention. In 2003, the concept of "social enterprise" appeared for the first time in the article "Transformation of the Operating Mechanism of Non-Profit Organizations and the Public Welfare Efficiency of Social Enterprises" (Shi Lirong, 2003), marking the official beginning of social enterprise research in China.



● Shi Lirong
A professor of the Sociology Department of the School of Ethnology and Sociology, Minzu University of China
The first head of the Sociology Department of the Faculty of Law, University of Science and Technology Beijing.
https://bkimg.cdn.bcebos.com/pic/1b4c510fd9f9d72ac6878ca5d42a2834359bbba3?x-bce-process=image/resize,m_lfit,w_268,limit_1/format,f_auto

At this stage, the research on Chinese social enterprises presents the following two characteristics:

▶　It focuses on the functions and advantages of social enterprises in solving Chinese social problems such as employment exclusion, livelihood difficulties, poverty alleviation and the weak, but the concept of "social enterprise" is still unclear. Although the cases of social enterprises in China are not abundant, they are gradually increasing.

▶　Chinese social enterprise research pays more attention to the concept, meaning and importance of "social enterprise", which reflects the process of understanding and digesting the concept of "social enterprise" in Europe and the United States. Since 2003, the case-based practice research has basically maintained a steady progress.

On July 16, 2006, former Microsoft China President Wu Shihong and American writer David Bernstein shared the book "How to Change the World: The Power of Social Entrepreneurs and New Ideas''. This book became a book of enlightenment for many social entrepreneurs. The publication of the book also marks the beginning of the entrepreneurial community's exploration of social enterprise practices.

## 2.2.2 THE DIFFICULT EXPLORATION STAGE OF CHINESE SOCIAL ENTERPRISES

From 2010 to 2014, it was a difficult exploration stage for Chinese social enterprises. At this stage, the concept of "social enterprise" has been widely accepted in China, and social enterprises have emerged one after another, but the practical nature of social enterprises has not been clarified, and the concept of "social enterprise" is often abused.

At this stage, social enterprises are increasingly valued by local governments. For

example, in June 2011, the "Opinions of the Beijing Municipal Committee of the Communist Party of China on Strengthening and Innovating Social Management to Comprehensively Promote Social Construction" proposed to further improve the level of social public services and actively support the development of social enterprises in the field of social services. As a proper term, "social enterprise" appeared for the first time in the documents of the Beijing Municipal Party Committee and Municipal Government. In addition, external forces support the development of social enterprises in practice. For example, the British Council has launched a social entrepreneur training program in China for eight consecutive years.



- China Social Enterprise and Social Impact Investment Development Report
It is the first white paper on social enterprises and impact investment in China.
http://www.cfc-c.org/upload_img/image/202002/1582356884180422.png

In 2013, the first Chinese social enterprise white paper "China Social Enterprise and Social Impact Investment Development Report" was released. The convener of the report was Zhou Weiyan, the former secretary-general of the YI Foundation and the co-founder of the Yongzhen Public Welfare Foundation. The report was co-authored by the Social Enterprise Research Center of Shanghai University of Finance and Economics, the Civil Society Research Center of Peking University, the 21st Century Social Innovation Research Center, and the School of Social Policy and Practice, University of Pennsylvania. The publication of this report fills the blank of the social enterprise white paper and has an important influence in the Chinese social enterprise area.

### The report pointed out:

*"As a new model of social organization innovation, social enterprises have the characteristics of business efficiency, professionalism and flexibility, and at the same time aim to undertake and solve social problems, and can actively and effectively participate in the process of social governance and development, to provide active and innovative solutions for the construction of a harmonious society, and play an increasingly important role in the field of social governance. At the same time, in the field of practice, social enterprises can open the barriers between many functional departments horizontally, and flexibly and effectively deal with comprehensive issues in the field of social services."*

# 2.2.3 THE INITIAL DEVELOPMENT STAGE OF CHINESE SOCIAL ENTERPRISES

*Scholars mostly take the research path from non-profit organizations to social enterprises. Based on analyzing the shortage of funds, low efficiency, and development difficulties of non-profit organizations, they emphasize the non-profit organization path of the rise of social enterprises in China and advocate non-profit organizations to adopt corporate operation. model, and give play to its advantages in social governance.*

*How can social enterprises participate in social governance? A case study and inspiration in the field of environmental protection*
*Miao Qing & Zhao Yixing*
*Publication: "Southeast Academic", Issue 6, 2020*

**2015.06**

**The first social enterprise certification in Shunde, Foshan**

China's first non-governmental and industry-based social enterprise certification method has emerged.

Since 2015, it is the initial development stage of Chinese social enterprises. In 2015, the implementation of the "Opinions of the State Council on Several Policies and Measures for Vigorously Promoting Mass Entrepreneurship and Mass Innovation" gave birth to the research on social enterprises under the background of social innovation and brought the development of social enterprises into a new stage. In 2015, Shunde Since 2015, it is the initial development stage of Chinese social enterprises. In 2015, the implementation of the "Opinions of the State Council on Several Policies and Measures for Vigorously Promoting Mass Entrepreneurship and Mass Innovation" gave birth to the research on social enterprises under the background of social innovation and brought the development of social enterprises into a new stage. In 2015, Shunde District of Guangdong Province issued the "Shunde Social Enterprise Cultivation and Incubation Support Plan" to carry out the local certification of social enterprises for

the first time in China. Social enterprises have entered a new stage of standardized development. The development characteristics of Chinese social enterprises in the past five years can be summarized into two aspects.

▶ First, the organization type, business model, operation model, legislation and accreditation of social enterprises have received more and more attention, showing an upward trend. It shows the pragmatic characteristics of pursuing institutional legality protection and organizational management efficiency.

▶ The second is the cooperation between the government and social organizations to promote the development of social enterprises. Many local governments cooperate with social organizations to support social enterprises to play a more active role in social governance and community services.

Generally speaking, the research on social enterprises has changed from descriptive research to explanatory research, and there is a tendency to pay attention to structured development.

**2015.09**

**China charity fair(CCF) officially launched**

The first national non-governmental social enterprise certification, implemented by the Social Enterprise Research Center

**2017.06**

**"Beijing Initiative for the Development of Chinese Social Enterprises"was released in Beijing**

An important beginning that everyone has realized the many challenges facing the development of social enterprises in China

Activities and events related to social enterprise also proliferated after 2015:

▶ In June 2015, the first China Social Enterprise and Social Investment Forum Annual Conference was successfully held in Shenzhen and will be held every year thereafter.

▶ In June 2015,7social enterprises obtained national social enterprise certification during the 4th China Charity Association.

▶ On June 11,2017, the "Beijing Initiative for the Development of Chinese Social Enterprises" was released in Beijing. This is an important beginning that everyone has realized the many challenges facing the development of social enterprises in China and has realized the need for more rigorous

**2019.04**

**Chinese Social entrepreneur Training Camp was held**

Dedicated to cultivating social enterprise talents, promoting the development of the social enterprise industry, and serving social enterprises

**2019.08**

**the first Social Enterprise Research Forum was held in Beijing**

The forum released the "China Social Enterprise Research Institute"

**2020**

**Several forums were successfully held**

theoretical system support, to form a shared social enterprise big data network.

▶ In April 2019, Social Enterprise Planet held a Chinese Social entrepreneur Training Camp, dedicated to cultivating social enterprise talents, promoting the development of the social enterprise industry, and serving social enterprises.

▶ On August 19,2019, the first Social Enterprise Research Forum was held in Beijing. The forum released the "China Social Enterprise Research Institute".

▶ The "Social Enterprise Day" initiative was released at the 2020 China Social Entrepreneur Annual Conference.

▶ On September 19,2020, the first Online Forumon Social Entrepreneurship and Social Innovation of Renmin University of China was successfully held.

▶ On November 5,2020, the first "Cheng Siwei Social Enterprise Development Youth Forum" was successfully held.

## 2.3 CHINESE SOCIAL ENTERPRISE CERTIFICATION

Since there is no corresponding legislation for social enterprises in China, social enterprises are generally in the stage of exploration and practice and the stage of theoretical research. The new thing of social enterprise is not widely recognized by the public at present, and it may cause a "legality crisis" of identity in the long run. Obtaining a "legitimate" identity through social enterprise certification helps social enterprises clarify their identity. The extended effect of this identification mechanism will guide the behavior of the public and investors and support social enterprises through specific actions.

## 2.3.1 THE HISTORY OF CHINESE SOCIAL ENTERPRISE CERTIFICATION

**2015.06**

**The first social enterprise certification in Shunde, Foshan**

Appeared the first social enterprise certification standard in China

**2015.09**

**The first social enterprise certification of China Charity Fair**

China's first non-governmental and industry-based social enterprise certification method has emerged.

Social enterprise certification started in 2015 in China:

▶ In June 2015, the first social enterprise certification in Shunde, Foshan, appeared the first social enterprise certification standard in China. However, this certification standard is local and only applies to Shunde, not to the whole of China.

▶ In September 2015, the social enterprise certification of China Charity Fair was officially launched, which is the first non-governmental and industrial social enterprise certification method in China. The specific certification implementation work is in charge of the China Social Enterprise Service Center (CSESC).

**2016**

**Implementing agency and certification index adjustment**

Adjust the certification indicators and scope, which changed to be implemented by the Shenzhen "Star of Social Innovation" Social Enterprise Development Center and continue to this day

**2017**

**Social Enterprise Certification Index 1.0 released**

The certification indicators are adjusted more scientifically

**2018**

**The social enterprise certification model of government and social cooperation**

Chengdu and Beijing Municipal Governments launched the first social enterprise certification

**2020**

**Social Enterprise Certification Standard 2.0 released**

Four-dimensional certification model, multiple impact evaluation

▶ In 2016, the certification indicators and scope were adjusted, and the work of China Social Enterprise Certification was carried out by Shenzhen "Social Innovation Star" Social Enterprise Development Center, which has continued to this day.

▶ In 2017, the social enterprise certification index 1.0 was released, which made the certification index more scientific. The indicators are adjusted to the following 4 items:

① An enterprise or social organization that has officially registered and operated independently for more than one year and has a full-time salaried team of no less than 3 people.

② The articles of association of the enterprise or social organization have specific and clear social goals, and the governance structure has a mechanism design that prioritizes social goals.

③ The way to solve social problems is innovative.

④ Innovative solutions to social problems are clearly and measurable.

▶ In 2020, the social enterprise certification standard 2.0 was released. This standard simplifies the certification process and is open throughout the year to improve the promotion of certification and the convenience of social enterprise consultation. And regard the social enterprise certification process as a process of learning and improvement for social enterprise. The four-dimensional questionnaire system forms a social enterprise database to better serve the development of social enterprises. At the same time, it guides social enterprises to clarify their own value and social mission and forms a continuous and

all-round service for social enterprises, so that social enterprise value services begin with certification and go beyond certification.



The figure above is the four-dimensional certification framework that China Social Enterprise Certification Standard 2.0 relies on. This framework shows that four-dimensional certification mainly examines the following four dimensions: social mission, stakeholders, value creation, and environment. The four-dimensional identification questionnaire and the influence identification system jointly achieve the following contents:

1. According to the four-dimensional design questionnaire system, the self-assessment process of enterprise identification is completed through qualitative and quantitative questions as the relevant dimension evaluation and standard of social enterprises;

2. Let the company clearly know the content and evaluation criteria of the certification;

3. The content of the four-dimensional certification is more in line with the projects acceptable to Chinese enterprises;

4. The indicator dimensions cover various theoretical bases: the definition of social enterprise, the Yunus study of the National People's Congress, social entrepreneurship, the measurement dimension of Harvard University's social purpose enterprise, etc.;

5. Influence reflects the more systematic and individual dimension of the social community's influence on the field, regional, green and international influence of social enterprises;

## 2.3.2  THE VALUE OF CHINESE SOCIAL ENTERPRISE CERTIFICATION

For the society and the entire market, the benefits of social enterprise certification are that it can identify the identity of social enterprises, clarify the image of social enterprises, and guide social enterprises to self-monitor. For social enterprises themselves, obtaining the status of social enterprise certification also has many advantages. The following advantages are also the reasons why many enterprises are attracted to apply for social enterprise certification:

▶ Obtain the right to use the social enterprise logo, and various social enterprises that have obtained the certification are awarded the corresponding level of social enterprise certificate and special logo. Certified social enterprises can be posted on certified social enterprise offices, operating service venues, etc. for customers and the public to identify.



● China Social Enterprise Certification for QianLin Baby (BeiJing) Bio-Tech Co., Ltd
The certificate is issued by China Social Enterprise Service Center. The certificate includes all audit organizations, organizers of audit activities, certificate issuing organizations, social enterprises that have obtained certificates, and the validity period of the certificate, which is valid for two years.
http://www.qianlinbaby.com/upload/201911/watermark/1572919813.jpg

▶ Social enterprises that have passed the social enterprise certification can use preferential and high-quality entrepreneurial and office space. The space provides a variety of functions, undertakes various activities, and organizes various themed exchanges, learning activities, assists in planning, organizing, providing information, docking resources, etc.

▶ Social enterprises that have passed social enterprise certification can have more opportunities to participate in capacity building and industry exchanges and can participate in advanced training workshops. The training courses are taught by scholars in related fields, outstanding social entrepreneurs, and domestic and foreign guests, at the same time, invite outstanding social enterprises in South Korea, Taiwan, and Hong Kong as special guests to share their experiences.

▶ Social enterprises that have passed social enterprise certification can enjoy social enterprise financial services. Provide corresponding financial services for social enterprises at different stages of development, including the seed stage (public

welfare funding), the establishment stage (social enterprise microfinance), the angel stage (social impact investment), and the fission stage (commercial investment). The service also provides professional 1+6 services to ensure that its social goals do not change and establish a social enterprise with Chinese characteristics.

▶ Social enterprises that have passed social enterprise certification can obtain social enterprise management support and enjoy professional social enterprise governance consulting and other services, which are divided into ordinary services and advanced services. The ordinary services include 5 major items and a total of 17 categories (the five items include registration, human resources, finance, taxation and legal affairs, social enterprise Operation, social enterprise certification), and advanced services, including 3 major items, a total of 13 categories (the three major items include advanced financial, taxation and legal services, advanced human resources services, and social enterprise operations).

▶ Social enterprises that have passed social enterprise certification can get the support of communication matrix, WeChat, Weibo, video, print media, new media, and KOL are fully covered, and established cooperative relations with many social enterprises and public welfare media to form a strong social enterprise public welfare communication matrix network.



● New Media Communication Matrix in China
These are the media with great communication power and influence in China. Using them can form a powerful social enterprise public welfare communication matrix network.
http://p9.itc.cn/images01/20210111/637eea7b9841479581f0d593798f0476.jpeg

▶ Obtain the opportunity of product channel docking. Through the channel platform, it provides product display and sales channels for social enterprises, and has helped many institutions to list many products. In the future, it will continue to put rich social enterprise products on the shelves, docking the B-end and C-end.

# 2.4 BASIC INFORMATION ON CHINESE SOCIAL ENTERPRISES

* The certification of Chinese social enterprises began in 2015, so various data on Chinese social enterprises have also been recorded since 2015.

## 2.4.1 THE NUMBER OF SOCIAL ENTERPRISES IN CHINA

The following data are all from the official data released by the China Charity Fair.

▶ In 2015, the first social enterprise certification of the China Charity Fair began. After open recruitment, a total of 67 institutions were declared. After expert review, 7 institutions stood out and became the first batch of institutions to pass the certification.

▶ In 2016, the second social enterprise certification was launched. A total of 154 institutions applied for certification, twice as many as in the first year. In the end, 16 institutions passed the certification.

**Number of certified social enterprises in China**

▶ In 2017, on the basis of the previous two sessions, the third session of social enterprise certification showed more significant influence. The number of declaration agencies reached 510, which was 3.3 times that of the previous year and 2.3 times that of the sum of the last two sessions. 106 social enterprises certified.

▶ In 2018, the fourth certification that ended in September, the number of declared institutions and the number of certified institutions reached a new high, 620 and 109, respectively.
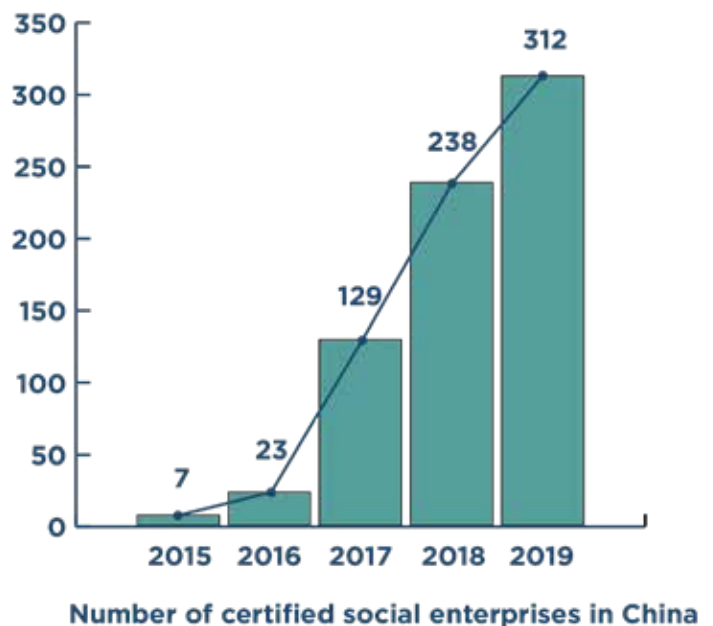
▶ In 2019, In the fifth certification, unexpectedly, only 74 companies passed.

To sum up, a total of 312 institutions have passed the certification in the five sessions, and the number of social enterprises has increased to a certain extent, but the number is still very small.

At the same time, the number of Chinese enterprises reached 913.5 thousand in 2015, 943.8 thousand in 2016, 967.3 thousand in 2017, 985.5 in 2018, and 1039.8 thousand in 2019.

Comparing the number of Chinese social enterprises and Chinese ordinary enterprises, there is a huge gap in the number of the two, which also just shows that Chinese social enterprises are still in the early



**Number of enterprises in China**

https://www.chyxx.com/industry/202012/918352.html

stage of development. The small number and slow growth rate are also some of the characteristics of Chinese social enterprises in this period. It is worth noting that in 2019, the number of certified Chinese social enterprises decreased compared with 2018. Under the premise that the certification system of Chinese social enterprises has gradually become clearer and clearer, Chinese social enterprises themselves are not clear about their own identities. As a result, not many social enterprises can pass the review under the strict review system. This is also a point that Chinese social enterprises need to pay attention to in the future.
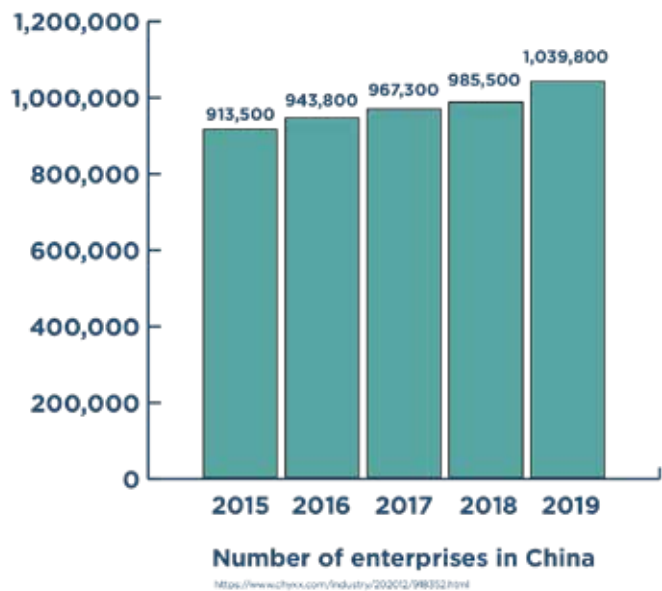
# 2.4.2 REGIONAL DISTRIBUTION OF CHINESE SOCIAL ENTERPRISES



2015

▶ In 2015, 7 certified Chinese social enterprises came from Jiangmen in Guangdong, Dalian in Liaoning, Lanzhou in Gansu and Shanghai.



2016

▶ In 2016, 16 certified Chinese social enterprises came from Guangzhou, Shenzhen and Foshan in Guangdong Province, Chengdu in Sichuan Province, Fuzhou in Fujian Province, Ningbo in Zhejiang Province, and Beijing



2017

▶ In 2017, 106 certified Chinese social enterprises were widely distributed in 26 cities in 19 provinces/municipalities across the country.

2018

▶ In 2018, the number of areas that received applications and passed certification reached 46 cities in 27 provinces/municipalities/special administrative regions, and the source of Chinese social enterprises has steadily expanded.



2019

▶ In 2019, new certified Chinese social enterprises in Tibet were added, bringing the number of areas with social enterprises to 47 cities in 28 provinces/municipalities/special administrative regions.

Overall, on the one hand, Chinese social enterprises are mainly concentrated in first-tier cities, such as Shenzhen, Beijing, Guangzhou, and Shanghai, and are actively emerging in second- and third-tier cities, such as Hangzhou, Chengdu, Suzhou, and Kunming.

On the other hand, there are few or no social enterprises in many underdeveloped regions.

**There are three main reasons for such uneven distribution differences:**

① The political, economic, social and cultural development of first tier and second-tier cities is relatively high, and the society has sufficient resources, such as stable economic security, favourable policy environment, active social forces and a high degree of cultural tolerance. Therefore, social enterprises are developing well in developed cities. On the contrary, some relatively

backward regions have relatively low levels of political, economic, social and cultural development, and do not have enough resources for social enterprises to develop.

② It is related to the communication channels. The communication channels of the Chinese social enterprise certification work include not only the official media and official WeChat accounts of the sponsors and executive agencies, but also some public welfare events (such as public welfare and charity project competitions) and alliance agencies. These communication channels are more active and well-known in developed cities. On the contrary, the communication channels of Chinese social enterprises in underdeveloped cities are relatively closed, making it difficult to promote social enterprises.

③ It is related to the intensity of dissemination. The certification of Chinese social enterprises is mainly in charge of institutions in Shenzhen, Beijing and Chengdu, so the dissemination efforts in these places are relatively large. The number of social enterprises in these three cities is also the largest in China, and the areas around the three cities are also have a lot of social enterprises.

# 2.4.3 THE SERVICE FIELDS OF CHINESE CERTIFIED SOCIAL ENTERPRISES

From 2015 to 2019, China's social enterprise industry continued to maintain stable development. By the end of 2019, 312 organizations had passed the audit and became certified Chinese social enterprises. These social enterprises are active in all walks of life in China's economic and social sectors, among which the field of social assistance and civil protection covers almost half of the business activities of certified Chinese social enterprises, and the areas of social assistance and civil protection include maternal child and family, vulnerable groups, rural development, accessibility services, elderly care, etc. In addition, the field of economic development has also begun to show a strong momentum.

**The Distribution of Service Fields of Certified Social Enterprises in China**



In 2015, there are only 7 Chinese social enterprises covered only two fields, one was health care, only one Chinese social enterprise was engaged in this field, and the other was social assistance and civil protection, with 6 social enterprises accounting for 85.7%.

In 2016, Chinese social enterprises involved more fields, 1 each in research education and culture, sports and entertainment, 3 each in healthcare and economic development and social cohesion,

**Culture, sport and recreation**

**Research education**

**Healthcare**

**Social assistance and civil protection**

8 social enterprises are involved in the field of social assistance and civil protection, while two social enterprises are engaged in areas outside the above categories.

▶ In 2017, there were 9 Chinese social enterprises engaged in culture, sports and recreation, 12 Chinese social enterprises in research education, 15 Chinese social enterprises each in economic development and social cohesion and other areas, while there were still only 3 Chinese social enterprises in healthcare, which did not increase compared to last year. Different from other fields, the field of social assistance and civil protection is developing rapidly, with 68 Chinese social enterprises engaged in this field in 2017, which is 8.5 times of the previous year.

▶ In 2018, 4 Chinese social enterprises were engaged in healthcare, 16 Chinese social enterprises were engaged in culture, sports and recreation, 28 Chinese social enterprises were engaged in economic development and social cohesion, and 30 Chinese social enterprises were engaged in education research, which was 2.5 times as many as in 2017. There are 126 Chinese social enterprises engaged in social assistance and civil protection, which is 1.85 times that of last year, and another 26 Chinese social enterprises are engaged in other fields.

▶ In 2019, there were 33 Chinese social enterprises engaged in culture, sports and recreation, which was twice as many as last year, 35 Chinese social enterprises engaged in research and education, and 8 Chinese social enterprises engaged in healthcare, the number was 2 times as many as in 2018. There still are

**Economic development and social cohesion**

150 Chinese social enterprises are engaged in social assistance and civil protection, accounting for 48% of all Chinese social enterprises, 45 Chinese social enterprises are engaged in economic development and social cohesion, and 40 Chinese social enterprises are engaged in other industries.



It is easy to see that TOP1 has been very stable and is the field of social assistance and civil protection. On the contrary, the number of healthcare fields has been relatively small, and the numbers of other fields are relatively average.

Data shows that more than 80% of Chinese social enterprises are working towards five SDG areas out of the 17 Sustainable Development Goals issued by the United Nations: No Poverty, Good Health and Well-being, Quality Education, Decent Work and Economic Growth, and Sustainable Cities and Communities.

## 2.4.4 CHALLENGES FACING CHINESE SOCIAL ENTERPRISE DEVELOPMENT

### 01. EXTERNAL CHALLENGES OF CHINESE SOCIAL ENTERPRISES

▶ **Legal legality dilemma**

The lack of relevant laws and policies has put Chinese social enterprises in a predicament of legal legitimacy. Policies and regulations on "commercial enterprises, farmers' professional cooperatives, social welfare enterprises, private educational institutions, private non-enterprise units, etc.". All play a role in the regulation and development of Chinese social enterprises. However, due to different legal forms, different types of enterprises have different standards and norms in terms of taxation, ownership, etc., which makes the development of Chinese social enterprises unbalanced and creates a sense of unfairness.

The existence of the legitimacy dilemma of Chinese social enterprises is an important factor affecting their current development, and the solution to these dilemmas requires not only the further maturity of the social enterprise industry itself, but also the development of a broad institutional environment, the innovation of cultural traditions, public recognition, knowledge improvement and other joint efforts.

▶ **The social legitimacy dilemma**

Insufficient understanding of social enterprises by the Chinese government and the public has led to the lack of social legitimacy of Chinese social enterprises. Many mainstream media reports on social enterprises are not enough, and even many people in social organizations, social services, public welfare and other related industries still lack understanding of social enterprises. It can be seen that the lack and insufficiency of public's

understanding of social enterprises has restricted the development of social enterprises to a certain extent.

▶ **Lack of trust**

The lack of trust in Chinese social enterprises by the government, the market and society restrict the development of Chinese social enterprises. On the one hand, people lack a correct understanding of social enterprises, and it is easy to have the impression of "profit-seeking" those social enterprises that operate independently are "profitable".

on the other hand, due to the irregularities and imperfections of the market economy, it is difficult for social enterprises to carry out their public welfare missions in a sustainable manner. At the same time, the existence of illegal acts by individual social enterprises also reduces the trust of the government, the market and the society, and makes people doubt the public welfare of social enterprises.

This makes some social enterprises afraid and unwilling to recognize their identity in order to avoid losing their credibility.

▶ **Insufficient funds**

Unsmooth financing channels are the biggest dilemma leading to the survival of Chinese social enterprises. First, most Chinese social enterprises are small in scale and insufficient in capacity. It is difficult to undertake the transfer of government functions and to obtain government financial support. Second, due to lack of awareness and lack of trust, individuals, companies and non-profit organizations have less support for it. Third, most social enterprises have insufficient assets and weak risk resistance, leading to greater credit risk. Therefore, financial institutions often refuse to provide loans to social enterprises on the grounds that they do not meet the loan conditions and qualifications, leading to financial support for social enterprises disappear.

At the same time, Chinese social enterprises still rely too much on external resources in terms of funds, and the strong sense of dependence and expectation has weakened the sustainable foundation for the long-term development of Chinese social enterprises. Therefore, while maintaining the original source of funds, integrating various funding channels such as social charitable donations, government subsidies and commercial income, and implementing the strategy of income diversification is of great importance to the future development of Chinese social enterprises.

▶ **Insufficient ability**

Insufficient capacity of social enterprises is an inherent obstacle that restricts the development of Chinese social enterprises. The comprehensive governance capability of Chinese social enterprises is reflected in the consideration of democratic factors when making major decisions, coordination and communication with stakeholders, cultural cultivation and brand concept establishment, transparency improvement and information disclosure, etc. However, the growth time of social enterprises in China is relatively short, and most of them are transformed from non-profit organizations

or enterprises. Among them, Chinese social enterprises transformed from non-profit organizations lack business operation capabilities due to their long-term dependence on government support and social donations. However, due to the long-term habit of pursuing maximum output, Chinese social enterprises transformed from enterprises lack the experience and ability of public welfare innovation. On the whole, Chinese social enterprises still have problems that need to be solved urgently, such as unclear definition of social mission, single market operation model, lack of core competitiveness, and limited innovation. Thus, lack of capacity threatens the sustainable development of Chinese social enterprises. However, many Chinese social enterprises currently invest a lot of resources in business model upgrades, product and service marketing, etc., while ignoring the improvement of the organization's own governance capabilities.



### ▶ Lack of talent

Lack of talent is the fundamental reason why Chinese social enterprises are in trouble. The success of social enterprises especially requires the leadership of social entrepreneurs with entrepreneurial spirit. Accordingly, a group of high-quality talents with professional skills is also essential. However, for the current Chinese social enterprises, it is very difficult to attract and retain talents, and there are very few young talents who are willing to try social entrepreneurship or choose to work in Chinese social enterprises. The reasons are as follows: First, the professional theory and education of Chinese social enterprises are slightly backward, resulting in a relatively insufficient training of relevant talents. Secondly, the demand for talents of Chinese social enterprises is more inclined to non-profit services, it is difficult to provide sufficient salary and attract professionals to join. Third, due to the insufficient strength of Chinese social enterprises, it is impossible to cultivate management talents suitable for the development of modern organizations. Therefore, many Chinese social enterprises are mainly retirees and amateurs, which cannot meet the development needs of Chinese social enterprises.

# 03

# TOOLKIT DEVELOPMENT

/SYSTEMIC DESIGN TOOLKIT

/PLATFORM DESIGN TOOLKIT 2.2

/COMMUNITY TOOLKIT

/FLOURISHING ENTERPRISE INNOVATION TOOLKIT

/THE BUSINESS MODEL CANVAS

/THE SOCIAL AND SUSTAINABLE BUSINESS MODEL CANVAS

/COMPARISON AND DISCUSSION

# 3.1 TOOLKIT DEVELOPMENT OVERVIEW

After completing the research on Chinese social enterprises, I started to develop the toolkit. Before the official development and production of the toolkit, I have an overall plan for the entire development process. First of all, in order to obtain the experience and ideas of designing toolkits from the existing toolkits, I will analyze the existing toolkits one by one, and then comprehensively analyze and compare the similarities and differences of each toolkit. Based on the experience gained in the comparison of the toolkits and the systemic design methodology, I will make a toolkit guideline to plan the entire framework of the systemic toolkit I designed, and finally fill in the content in the framework to complete the design and production of the entire toolkit.

# 3.2 SYSTEMIC DESIGN TOOLKIT



https://www.systemicdesigntoolkit.org/methodology

▶ **Basic Introduction**

Because of the development of globalization, the challenges we face have become more and more complex, and traditional methods of solving problems are no longer effective. In this fundamental shift, systemic design appears to provide the answer to this complexity. And the Systemic Design Toolkit is a tool developed to meet the needs of increasingly complex projects.



● KRISTEL VAN AEL
Partner at Namahn, associate professor at the University of Antwerp
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● PHILIPPE
VANDENBROECK
Partner at Shiftn
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The Systemic Design Toolkit was led by Kristel Van Ael of Namahn and Philippe Vandenbroeck of shiftN, and an early version was first shown at the RSD5 workshop in Toronto (2016).

Since then, the original author, in collaboration with Peter Jones (Systemic Design Society) and Alex Ryan (MaRS Discovery Zone), continued to develop the toolkit into a full-fledged version, with an official release in 2018.



- ALEX RYAN
  VP of Systems Innovation and Program Director of MaRS Solutions Lab
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- PETER JONES
  Co-founder and frequent co-chair of the RSD Symposium, co-founder of Systemic Design Association
  https://uploads-ssl.webflow.com/60dcb5623fb2409307a2
  0c8c/60dcb5623fb240f8a2a20e05_RSD7_SDT_Partners_
  PeterJones-p-500.jpeg

▶ **Purpose**

The Systemic Design Toolkit will use the methodology of systemic design to help you co-create interventions in 7 steps to address the complexities of organisations and societies.

▶ **Steps for usage**

The Systemic Design Toolkit contains 7 methodological steps, namely: framing the system, listening to the system, understanding the system, defining the desired future, exploring the possibility space, designing the intervention model and fostering the transition.

▶ **Step 1**

The first one is a canvas called rich context, it's a technique that helps users see the "big picture" by mapping current practices, trends, and innovations in user's system.

Its purpose is Framing the system. Specifically, "setting the boundaries of the system in space and time, identifying hypothetical parts and relationships."
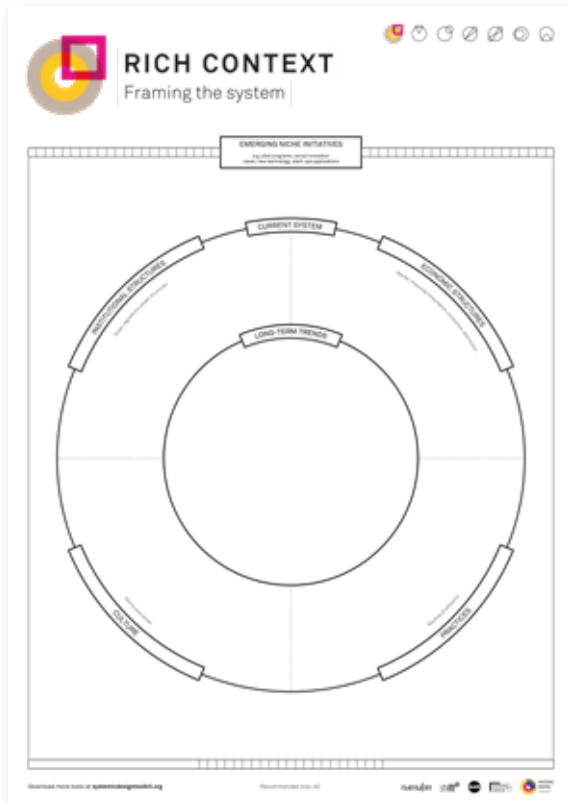
● CANVA 1 - RICH CONTEXT

The way to use this canvas is to fill in the form, and the required materials include rich context templates, sticky notes and tags.

The contents to be filled include Long-term trends, Institutional structures, Economic structures, Practices and Culture.

In long-term trends, users need to write down the trends that affect the issue (e.g., climate change, population growth, population ageing, resource depletion…) and gather them in the center of the canvas.

In order to analyze the current system, users need to map the established way of doing things, such as how does society currently deal with this problem? Through cultural and social norms, practices, rules, infrastructure, existing networks, power relations, etc.

When filling out emerging niche initiatives, users need to think about what new and innovative ways of approaching the problem are, which users can use to generate a common understanding of the current situation and identify the profiles you should interview in your field research.



● CANVA 2 - ACTANTS

▶ **Step 2**

The second step requires the use of a canvas called Actants, it's a method for modeling, summarizing, and communicating systematic field research.

Its purpose is to Listen to the system. Specifically, "Listening to the experiences of people and discovering how the interactions lead to the system's behaviors. Verifying the

initial hypotheses."

The way to use this canvas is to fill in forms and draw curves and the materials include interview notes, actor templates, markers, and pictures.

The contents to be filled include Actant1&2 Experience over time Analysis curve and Perspective.

Users are required to conduct interviews with the roles studied and then carefully read the interview notes from the field study to analyze the relationship between the two roles. For each of them, choose a picture and summarize their view on the issue with a powerful quote. Then for each actor, curve the archetypal experience over time and annotate key moments and positive/negative emotions on the curve. Then analyze the curves separately and try to define the qualitative and quantitative factors/variables that affect the change in experience from the interviews. Finally look at the curves together to find the difference between the curves and try to understand why the experience is different.

▶ **Step 3**
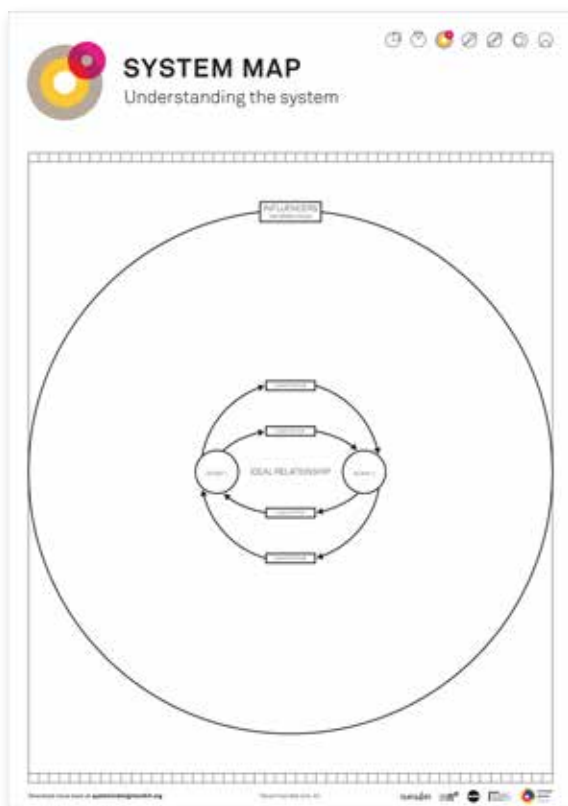


CANVA 3 - SYSTEM MAP

In this step, users need to complete a System map, it's a technique for visualizing a system, the interrelationships between its structure and its elements.

Its purpose is to understand the system. Specifically, "Seeing how the variables and interactions influence the dynamics and emergent behaviors. Identifying the leverage points to work with."

The contents to be filled include Actant1&2, Influencers, Leverage points and Ideal relationship.

Users need to identify qualitative/quantitative variables exchanged between actors, identify ideal relationships between actors, and write

them down on post-it notes, which are then affixed to the center of the poster. Then review the stories that emerged from your interviews to identify causal loops and map them around the "ideal future." Finally connect the variables in the loop to the core exchange and see which variables have the most impact on the core relationship.
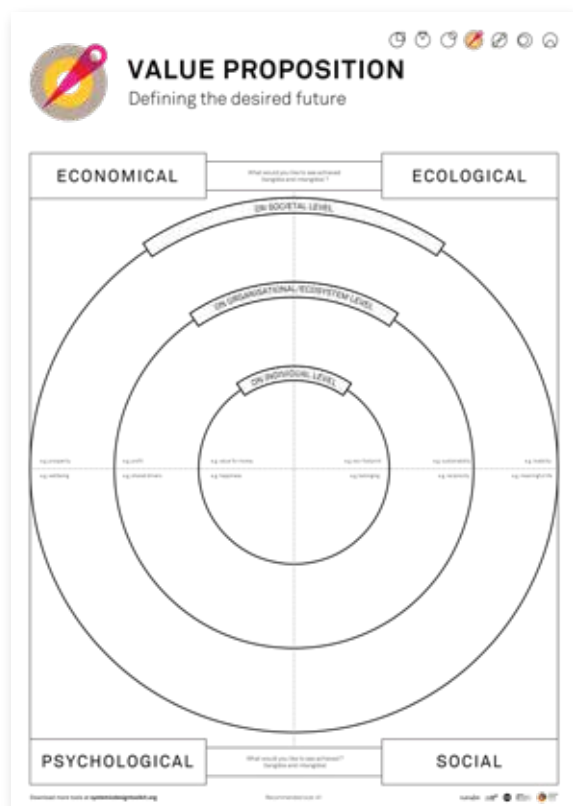


● CANVA 4 - VALUE PROPOSITION

▶ **Step 4**

The name of this canvas is the Value proposition, it's a tool for making an ideal future clear by laying out the benefits that interventions will bring to individuals, organizations, and society in the future.

Its purpose is to define the desired future. Specifically, "Helping the stakeholders articulate the common desired future and the intended value creation."

The contents to be filled include Benefits on individual level, Benefits on organizational or ecosystem level and Benefits on social level.

This requires the user to brainstorm what benefits the single individuals offer, write them down on sticky notes, and place them in the center of the canvas. Then write down the benefits the organization/ecosystem will receive, placing them around the first circle. Finally, write down the benefits that the intervention will bring on a societal level. Place them around the second circle.

Users can use the tool to expand the ambition of the team and align stakeholders with expected outcomes.

▶ **Step 5**

The fifth canvas is called Intervention strategy, it's a brainstorming tool for
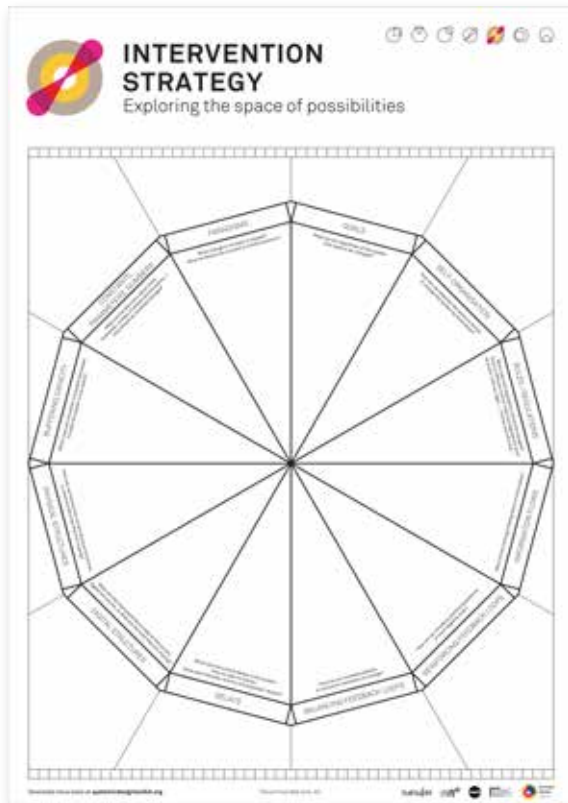
understanding and exploring at what level (and how) you can interfere with the system.

Its purpose is Exploring the possibility space. Specifically, "Exploring possible ideas for intervening on the leverage points. Empowering the ideas by working with the paradoxes in the system."

The contents to be filled include Paradigms, Goals, Self-organization, Rules/regulations, reinforcing feedback loops, Information flows,

Balancing feedback loops, Delays, Digital structure, Physical structures, Buffering capacity and Constants, parameters, numbers.

Using this tool, users can explore different possible intervention types to ensure that future combinations of interventions will cover the big picture.

First, the user identifies the challenge to be solved by looking at the leverage points identified in the system map to achieve the future that the user desires. Then use the Intervention Strategy Canvas: - At what level do you need to anticipate meeting the challenge? - What interventions need to be taken, consider possible interventions, write them down on a sticky note.

▶ **Step 6**
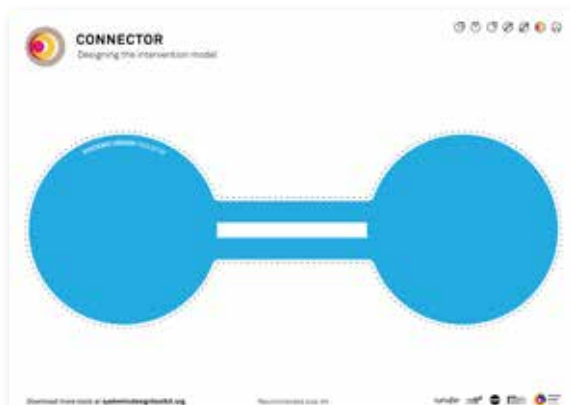
The sixth step has two tools, one is called Intervention mode, which is a connector where the user reviews the ideas contained in the Intervention Strategy Canvas: Which ideas can be mutually reinforcing or mutually reinforcing? Then stick post-it notes on the props provided, use them to connect ideas to build interrelated pre-models.

Another tool is called Paradox cards, which are cards that help formulate ideas into more concrete concepts and ensure that these concepts create positive reinforcement cycles. Users need to assign a paradox card to each preconceived idea and choose a card that best describes the idea: which side of the paradox does the idea cover?

The purpose of both tools is Designing the intervention model. Specifically, "Defining the engine for change and its variations. Iterating by envisioning its implementation in different contexts."
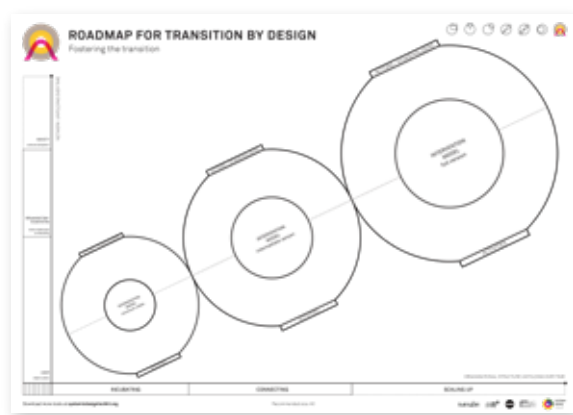


• CANVA 7 - ROADMAP FOR TRANSITION  DESIGN

▶ **Step 7**

The last canvas is named Roadmap for transition, it's a tool for planning the implementation of interventions in such a way that the design changes.

Its purpose is Fostering the transition. Specifically, "Defining how the interventions will mature, grow and finally be adopted in the system."

The contents to be filled include Actors/ Stakeholders, Activities, Intervention model minimum viable, Intervention model intermediate viable and Intervention model full viable.

The user describes the minimal version of the planned activity on a post-it notes, and the participants involved, with the post-it note in the first circle.  After completing the first activity, the user can write down the names of these participants, and the activities needed to create the learning network are posted on the second circle. In the third circle, users need to ensure that your intervention becomes an established practice in the current system and affects the general public.

Users can use it to map transitions to desired goals by planning and developing preliminary models in time and space.

# 3.3 PLATFORM DESIGN TOOLKIT 2.2



https://boundaryless.io/pdt-toolkit/

▶ **Basic Introduction**

Over the past few years, the impact of "platforms" has been extensively discussed from multiple perspectives, as businesses realize that they are creatively interacting with third parties, it takes the ability to connect them to each other to be successful.

While the general business model canvas is an excellent tool for companies to express their value propositions, more specialized content is needed when it comes to platform value expression. Businesses need help defining their platform vision to serve its entire financial ecosystem, where everyone and everything is interconnected.

So, in 2013 Boundaryless SRL published the first ever codified approach to platform design. The Platform Design Toolkit is a design framework that essentially consists of a set of design canvases along with other resources such as the user guide.



- Boundaryless SRL
A company helps global customers with Business Strategy and Organization Design for the age of Ecosystems
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- Boundaryless SRL
A company helps global customers with Business Strategy and Organization Design for the age of Ecosystems
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► **Purpose**

At the heart of the Platform Design Toolkit approach is an extensive and well-tested step-by-step process that helps users from contextualizing entities and their relationships in the ecosystem to designing the platform experience. Identify the two core engines of value: trading and learning and incorporate everything into designs and business models that you can prototype and validate.

► **Steps for usage**

The Platform Design Toolkit consists of 7 canvases with a total of 8 steps.



● CANVA 1 - THE ECOSYSTEM CANVAS

► **Step 1**

The name of the first canvas is The Ecosystem Canvas, and its purpose is Mapping the Ecosystem

Using the Ecosystem Canvas, users will reflect on the ecosystem they wish to shape, organized according to the user's platform strategy. The user will map the entities that exist in that ecosystem, and then the user will understand the roles they might play and cluster them if necessary.

The contents that need to be filled in this canvas include Peer consumers, Peer producers, Partners and Platform.

First try to distract, spend some time brainstorming alone, then group similar entities together, and finally position Peer consumers/Peer producers/Partners based on the key value generated: are they consumers or producers? Select up to five entities in the Peer consumers/Peer producers/Partners (peer-to-peer) scope. The user can cluster two similar entities together (find an overall description), or just select five entities that they want to start with.

▶ **Step 2**
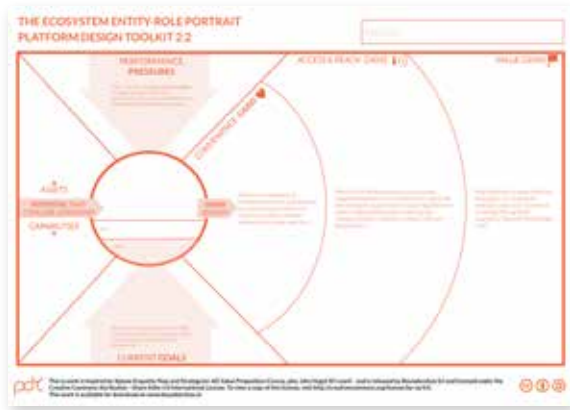
The second canvas is called Ecosystem Entity-Role Portrait, and its purpose is to Portraying Ecosystem's Entities-Roles.

The contents to be filled in this canvas include Potential assets, Potential capabilities, Current goals, Performance pressures, Convenience gains, Access&reach gains and Value gains.

Depicting an entity is a slightly different activity than traditional user research methods. In the framework of the Platform Design Toolkit, ecosystem entities are loose clusters, which is one of the reasons why they are called roles.

For users to identify the REACH GAINS that entities are looking for, ask themselves: What are these entities looking for? What is the perfect producer for this consumer (and vice versa)? REACH GAINS should help users explore which dimensions are important in your ecosystem so that entities can connect with the niche they are looking for. Make sure to compile first the entity role portraits for the entity roles that seem most interesting to your design challenge. Finally, remember that users are mapping the entities they want to mobilize now, not in the future where their platform exists. In short, focus on the ecosystem (from the outside in), not the "platform" idea.

Of course, to understand the key issues on this canvas, users can rely on your industry knowledge, intuition, or better yet, preliminary interviews. A platform strategy that maintains players while enabling them to reach their potential will generate what we call a pull factor: a stimulating attraction for each entity. So, each entity will choose to play a role "inside" the policy users will provide.

▶ **Step 3**

The third canvas is called Ecosystem's Motivation Matrix and its purpose is Analyzing the potential to Exchange Value.

The content that needs to be filled in this canvas includes Roles and Value flows
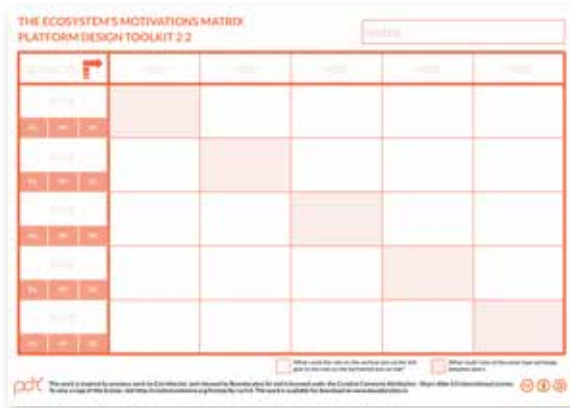
First, the user should place the selected entities in the 1st row and 1st column in the same order, then analyze the value flow between different types of entities, and finally enter the same type of entities. Not all cells have to be full of flow, which may represent not much value flow or potential flow.

Ecosystem's Motivation Matrix is a highly divergent tool, the user just needs to keep an open mind and don't ask right or wrong: just map and diverge and enrich to see anything that might be interesting and important. This is the moment to listen to the ecosystem: listen to what they want to tell. What the user is trying to map here is just what an entity can "give" to each other.

▶ **Step 4**

Unlike the other steps there is no canvas in the fourth step, its purpose is to Choose the core relationships you want to Focus on.

After the user has prepared the entity-i.e., persona and motivation matrix in the previous steps, it is time to start digging into which part of the strategy to develop first.

The core entities that users will identify are likely to be their priority entities, at which point users would do well to double check that they have entity role profiles for all entities selected in the core system, especially the "core entities" role".

▶ **Step 5**

The fourth canvas is called Transactions Board, and its purpose is to Identify the Elementary Transactions.

The contents that need to be filled in this canvas include Roles, Transaction/interaction, Currency/value unit, Channel components, Notes on channel
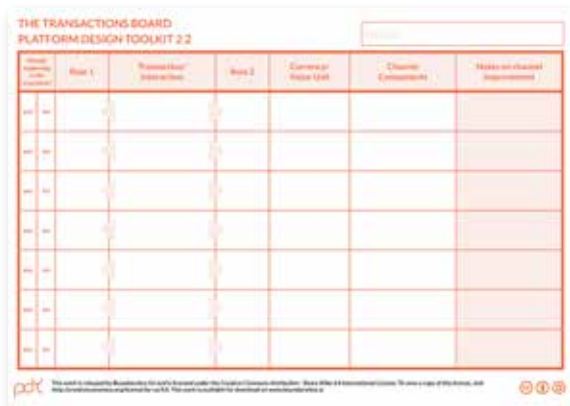
CANVA 4 - THE TRANSACTIONS BOARD

improvement and already happening the ecosystem.

First the user needs to run a trading committee for each relationship identified in the "core system", then enumerate all the basic elements by looking at the elements that appear in the motivation matrix, where the user can see what has happened in the ecosystem atomic transactions, and the transactions that might happen if given enough convenience, and then think about how to reduce the transaction cost of these interactions in a simpler way.

The key to understanding this step is to understand that the user's task is to determine which transactions and channels already exist, how to improve them, and what new channels the user needs to create to enable interactions and transactions at scale.

▶ **Step 6**
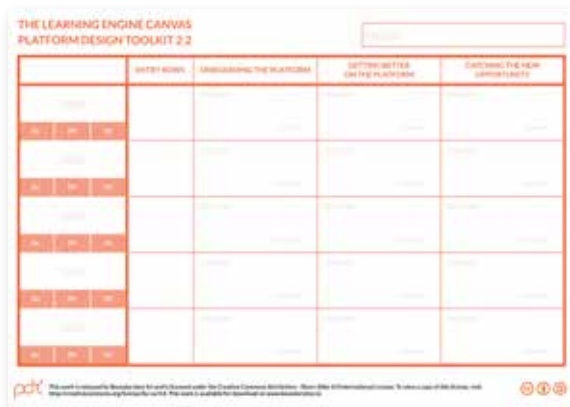


CANVA 5 - THE LEARNING ENGINE CANVAS

The fifth canvas is called Learning Engine Canvas and its purpose is Designing the Learning Engine.

The contents that need to be filled in this canvas include Roles, Entry rows, Challenges and services of onboarding the platform, Challenges and services of getting better on the platform and Challenges and services of catching the new opportunity.

First users can place each entity role using the boxes on the left column and start exploring how they evolve through three steps (onboarding, getting better, seizing new opportunities); after that, users need to imagine how the roles of different entities will evolve: How does the consumer become the producer? How do peer producers (less strategic) become partners (more strategic)?

The Learning Engine Canvas provides users with a three-step process framework to design services to support the user's ecosystem entities at each step to be optimal.

▶ **Step 7**
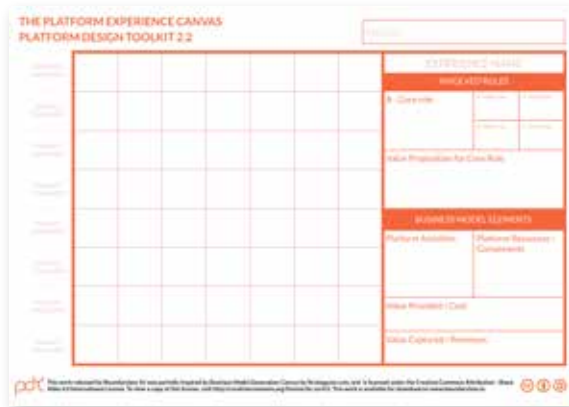
The sixth canvas is called Platform Experience Canvas and its purpose is Assembling the Platform Experiences.

The content that needs to be filled in this canvas includes Involved roles, Business model elements and Channel/touchpoint.

The Platform Experience Canvas is the tool that users use to consolidate most previous understandings and conversations.

First the user can give the experience a name and select the entity of the viewpoint they are using, at this step the canvas can be used without restrictions, and the user can use different post-it colors to identify entity-to-entity and platform-to-entity interactions so they can move them around until a good flow is reached, only at the end when the user can see the full value stream, explore the business model.

▶ **Step 8**

The seventh canvas is called Minimum Viable Platform Canvas, and its purpose is Setting up the Minimum Viable Platform.

The content that needs to be filled in this canvas includes Platform experiences, Notes on the current implementation of the experience, Key assumptions, Way to test, and Criteria for validation.

First users define what experiences they want to have in Minimum Viable Platform and understand what the key assumptions in those experiences are. The user then needs to think about how to build the minimal Minimum Viable Platform, and how this Minimum Viable Platform will test hypotheses. The end user chooses the most unbiased verification criteria, such as testing measurable conversion rates, such as invitations from social media groups.

After completing this step users will have a clear Minimum Viable Platform setup to prototype and use to see if their most risky assumptions are correct. If the assumptions in the Minimum Viable Platform are invalid, it helps the user go back to the design and possibly make a different choice. Once users' ecosystem platform fit is verified, they need to consider their growth strategy.

# 3.4 COMMUNITY TOOLKIT



https://www.communityeconomy.it/en/the-toolkit/

▶ **Basic Introduction**

Community Toolkit is a project of Collaboriamo, HousingLab, and Itinerari Paralleli. It was released in 2020 and consists of 6 canvases.

To understand the community toolkit, we must first understand what community design is.

Community design is an approach that can be applied in a variety of contexts to help users create value from relationships. It is worth noting that community design is not to design a community, but to design a large environment in which people can move, interact, and obtain information freely. In fact, communities cannot be designed because communities are made up of people and relationships that arise because of people: relationships cannot be predicted, but we can design services so that relationships are supported by circumstances and conditions so that they can grow.



- Collaboriamo
  A leading organization for the promotion and dissemination of the cooperative economy in Italy, established in 2013
  https://collaboriamo.org/media/2019/01/collaboriamo-logo-500.png



- Collaboriamo
  An association for the dissemination of good practice, sharing skills and participatory experimentation in the context of social and collaborative living
  https://www.housinglab.it/hlab/wp-content/uploads/2021/08/logo_navbar-02.png

Different from user-centered design, community design puts the needs of the entire group at the center of the design. Community design no longer studies the interaction between organizations and users but how to promote the relationship that exists between organizations and groups. It also includes fostering relationships between members of the group itself.

Community Toolkit is a set of tools designed to support the birth and growth of the community, and it is aimed at business managers and entrepreneurs, entrepreneurs, social enterprises, citizens and associations, cooperatives, and third sector business or employee communities. Community Toolkit can be used to develop communities and also helps organizations, nonprofits, corporations, startups, and platforms turn their customers, suppliers, or internal employees into a community. It assists in creating and developing communities, from conception to implementation, providing frameworks, methodologies, and tools.

▶ **Step 1**



- CANVA 1 - OPENNESS

The first canvas is called Openness, and it's a tool for community managers interested in learning more and getting to know their community members better. By using this canvas, users can determine who can and cannot participate in the community and where to meet potential members.

It helps to identify who the community members are, define the groups or categories the community targets, what their characteristics are and how to identify them. Its structure allows users to simultaneously think about those who participate in the community and those who remain outside, a dialectic that will enable users to better focus on members and their characteristics, whether in terms of inclusion or exclusion.

The use of this canvas starts at the center, using the canvas to initially define the value proposition of the project/product/service, then moves on to the next two semi-circles "participants" to determine whether the user intends or does not intend to open the community to them categories or groups of people, try to describe groups in each department in as much detail as possible. In particular, in the upper part of the canvas, users fill in the actors they want to participate in the community, and in the lower part, they fill in the actors they do not wish to, thus identifying opponents who can help strengthen the identity of the community. The final step is

to understand where to "find" a group with these specific characteristics or how to select it.

● CANVA 2 - GOVERNANCE MAP

The second canvas is called the Governance Map, and its goal is to identify the main roles and proposed topics within the community and define the responsibilities and activities of each role. Categories that can identify roles within a community can be grouped into the following four categories:

User: A person who passively uses the service without creating value for the community.

Supporters: Those who actively join the community and create value for the community

People Activists: Those who use the service repeatedly and make a difference in the community

People Contacts: Organizing the true reference point and participating together in its construction.

The tool is divided into two main parts to be done sequentially: The first part is divided into these four categories: References, Activists, Supporters, Users, which helps to bring out the main character of the community or where users are expecting it to grow the core. But there is no category distinction in the lower part.

Users can start with the outermost circle (Users) and continue to identify other categories. Once individual roles have been analyzed⬚ users can then move on to thinking about the activities and responsibilities of each of them. Then, move on to defining the internal roles, responsibilities, and activities of the organizations responsible for managing the community.

The purpose of Governance Map is to provoke the following action to be taken to activate or reactivate your community. Start with the resources available to the

community (contacts, locations, channels, meeting opportunities), identify short-term and sufficiently realistic goals, then define actions designed to achieve one or more of these goals: on time, in short order, concrete, and achievable actions.

The third canvas, The Provoker, is an iterative tool, and the creators recommend using it again after all canvases have been manipulated to check if the goal has been achieved, set a new goal, and determine the following action.

The tool is divided into two parts, and the upper part is in the shape of a semi-circle. It has four parts, including contacts, places, channels, and occasions, which helps to reflect on what is available and what goals can be reasonably set. The second half is dedicated to defining the next steps.

● CANVA 3 - THE PROVOCATEUR

After completing the first part, the user can move on to defining the next actions to implement to achieve them by looking for goals or objectives that are considered to be a priority or easier to achieve and then starting from these and the indicated resources. Then users can then better detail the action with an action plan.

Completing this canvas will be helpful both in creating new communities and managing growth or change in existing communities.

▶ **Step 4**

The fourth canvas is called The Meter, and its goal is to assess actions taken to anger the community.

Starting from the previous canvas, the user will define the evaluation parameters and track what happens during the provocation, then draw conclusions that will be the basis for determining the next move, returning to The Provoker.

CANVA 4 - MONITOR

Like The Provoker, The Meter is an iterative tool.

It is closely related to the "The Provoker" tool, so users are advised to combine the two canvases. It's valuable both in creating new communities and managing the growth or changes of existing ones.

The use of this canvas will begin with the green box in the upper left corner, where users write the goals and actions of "The Provoker," explaining how and why they hope to inspire activation or change in the community. Then, moving to the right, the expected outcome is defined, then what is to be measured and when and finally how. Each desired result has a measurement element in its own way. While or after this step, report the actual result in the last column on the right.

In the stimuli of the community, it is possible for users to observe unexpected and interesting things, namely those spontaneous activations or those reactions that the user did not foresee. Finally, the user needs to fill in the last "Valuation" box to end the loop.

▶ **Step 5**



CANVA 5 - TOUCHPOINT MAP

The fifth canvas is called Touchpoint Map, and its purpose is to identify, weigh, and map the four main processes that make up the relationship between a community manager or organization and the community. The primary activity is assisting, designed to support the resolution of problems related to the service or program and to allow community members to develop unique communication from the organization to the community, sharing of information or content, and dialogue and listening spontaneously or motivated to grasp

needs, novelties, dissatisfaction, new projects, feedback from the community.

The touchpoints for which the tool takes its name are places where connections between communities and organizations, whether physical or digital and especially where planned activities can be carried out.

The tool is divided into two main sections to be filled in sequentially: the user must fill out the first column first to ensure they have control over all possible planned activities. Then go ahead and fill out the form line by line, identifying the digital and physical touchpoints and which HR will handle the activity. Of course, not all activities marked with weight need to have both digital and physical touchpoints, just write down all the touchpoints of the event as fact.

▶ **Step 6**



● CANVA 6 - REWARDS MAP

The final canvas is called the Rewards Map, and its purpose is to determine what motivates members to take action and what rewards the organization can offer based on previously identified roles and related activities.

The tool can only be used after filling out the Governance Map and identifying the roles, responsibilities, and activities they perform. Users need to determine the level of engagement of community members, i.e., whether community members are users, supporters, activists, or referees, which can lead to changes in motivation for engagement and the organization of appropriate rewards.

Use the canvas starting with each member's reasons: If a supporter does something, what is the reason for him doing it?

Then in the second step, once you've guessed the reason, is to understand what categories of incentives the organization can offer and list them in the left column. This step can be done with cards. Once the abscissa and ordinate of this form are filled in, rewards will be assigned based on type, which may be aligned with the motivations and expectations associated with the stage.

# 3.5 FLOURISHING ENTERPRISE INNOVATION TOOLKIT

## ▶ Basic Introduction

Today, in the early decades of the 21st century, there are clear signs of a severe and growing innovation deficit and the urgent need for significant and sustained innovation in human economies and societies.

And business is one of the most important sources of innovation for human well-being in the 21st century – socially, environmentally, and financially. Therefore, in order to close the innovation deficit, members of the Canada Strong Sustainable Business Models Group, the largest design school in Canada, the Innovation Community of Practice and Action Research Knowledge Mobilization Initiative of the Strategic Innovation Lab at OCAD University in Toronto, believe that all leaders have the responsibility to innovate their enterprises so that they can inform us of the feasibility of what is being developed in a way science, and to do so in a way that makes a significant contribution to human well-being.

- Canada Strong Sustainable Business Models Group
  An applied / action-research group, creating new knowledge usable by practioners, using a systemic-design epistemology
  http://ssbmg.com/header_image.php?subdomain=ssbmg.com
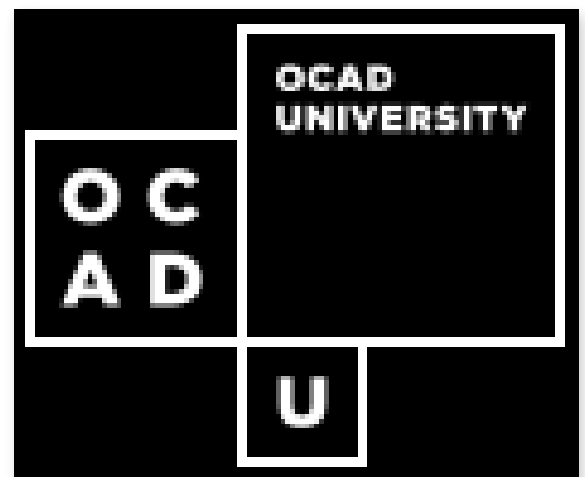
- Ontario College of Art & Design University
  A public university of art and design located in Toronto, Ontario, Canada.
  http://ssbmg.com/header_image.php?subdomain=ssbmg.com

The flourishing enterprise innovation toolkit is co-produced by practitioners in Canada and around the world, it was released in 2016 but it is still being improved to this day. This toolkit is management innovation, a new way to help businesses and their investors improve their financial, social a nd environmental performance by working with all stakeholders. The toolkit can help organizations achieve their goals from purely financial viability to "doing good things well" by identifying the risks and

opportunities associated with their chosen goals. Using a proven business model lens, the toolkit enables leaders to collaborate more effectively to understand, explore, diagnose, improve, design, and tell the story of integrated solutions that drive the economic returns needed to achieve their goals, a combination of social benefits and environmental regeneration.

The flourishing enterprise innovation toolkit is suitable for all types of businesses, whether for-profit, not-for-profit, cooperatives, benefit companies or government agencies, etc. It is also suitable for companies at all stages of development, whether start-ups or long-established businesses. In addition, it can function in an extensive range of contexts: different cultures, sectors, groups, issues, and locations.

At the core of this toolkit is the flourishing business canvas, it is a visual design tool with a common language to enable more effective collaboration between any stakeholder group considered relevant to designing an organization's business model in the economic, social, and environmental aspects.

▶ **Purpose**

Flourishing enterprise innovation toolkit creates practical, strategic pathways for organizations to work to close the innovation gap. It empowers leaders to drive their viability to move businesses further into the future and decisively drive our society, environment, and economy towards sustainable development.

The creator's vision is a world where the human enterprise is no longer just trying to reduce harm but sets the goal of humans and other life to thrive on this planet as a core goal - to contribute to the achievement of the UN SDGs and more.



● Sustainable Development Goals
The Sustainable Development Goals (SDGs) were set in 2015 by the international community as part of the UN 2030 Agenda for Sustainable Development through which countries of the world collectively pledged to eradicate poverty
*https://ec.europa.eu/international-partnerships/sites/default/files/styles/1140x760/public/media/body/sdg_-_wheel_-_smaller_2.png?itok=Zqt6Si2b*

FLOURISHING BUSINESS CANVAS

▶ **Steps**

The canvas contains 16 essential and sufficient questions, divided into three groups according to financial, social, and environmental aspects, and the user can see three types of information from left to right. The process indicates how and where to carry out the user's project, including biophysical stocks, ecosystem services, resources, activities, partnerships, and governance, followed by a value, indicating what the project is, including two things that need to be filled in: value co-creation and value co-destructions. People, of course, represent the people involved in the project, including relationships, channels, stakeholders, ecosystem actors, and needs, and then fill in the outcomes at the bottom, including costs, goals, and benefits.

# 3.6 THE BUSINESS MODEL CANVAS



https://www.strategyzer.com/canvas/business-model-canvas

▶ **Basic Introduction**

As the "disruptive" impact of new technologies on the global economy and markets grows, there is a growing focus on the "business model," whether it is a potentially successful startup company or a traditional company that needs to rethink its business models to bring them into the 21st century.

In the early 1990s, managers of large corporations sought to look inside their companies through more conversational forms of leadership, which intensified the study of business models, and this form of "brainstorming" became popular. This new cultural and market trend laid the foundation for the success of a framework called the Business Model Canvas, conceived in the early 2000s by "business theorist," Strategyzer founder and Swiss researcher Alexander Osterwalder.



● Alexander Osterwalder
A Swiss business theorist, author, speaker, consultant, and entrepreneur, known for his work on business modeling and the development of the Business Model Canvas.
https://upload.wikimedia.org/wikipedia/commons/thumb/7/7c/Alexander_Osterwalder%2C_October_2011_%28cropped%29.jpg/330px-Alexander_Osterwalder%2C_October_2011_%28cropped%29.jpg

As Alexander Osterwalder himself wrote in his late 2005 blog, defining and explaining his approach: "Business model issues have become important in today's competitive environment because today's companies need to have the ability to manage continuous change and constantly adapt to rapid change, creating a business environment by introducing new business ideas and concepts is essential for companies to thrive and survive. The business model concept is a particularly useful unit of strategic analysis adapted to today's business environment."

## ► Purpose

Models are simplified descriptions and representations of complex real-world objects. A model describes the original in a way that allows us to understand its essence without having to deal with all its characteristics and complexities. The purpose of The Business Model is to provide a simplified description of how a company conducts its business without having to dive into the intricate details of all its strategies, processes, units, rules, hierarchies, workflows, and systems.

The advantage of this tool is that, when it is used in a company team, it helps make the structure and dynamics of one's business model truly "visible" by involving everyone in its definition.



● THE BUSINESS MODEL CANVAS

## ► Step

The nine "blocks," or rather, the constituent elements of the Business Model Canvas (BMC) identified by Osterwalder are:

1. Value proposition: the value offered to the market.
2. Customer group: the customer group for which the value quotation is aimed.
3. Channels: Communication and distribution channels to reach customers and provide them with suggested value offers.
4. Customer relationship: building with customers (communication and customer service).
5. Key resources: the resources needed to make the business model possible.
6. Key Activities: Activities to implement the business model.
7. Key Partners: Partners and their motivation to support our business.
8. Revenue streams: the flows that make up the business profit model.
9. Cost structure: The cost structure is derived from the business model.

Each seemingly single "frame" has interlinked parts, and users can fill in logically according to the prompts of the frame.

# 3.7 THE SOCIAL AND SUSTAINABLE BUSINESS MODEL CANVAS

▶ **Basic Introduction**

The Social and Sustainable Business Model Canvas was born from the previous canvas, the Business Model Canvas.

As people become more conscious of the impact of human activities on the environmental crisis of the earth's society, companies big and small are also being asked to give effective answers about their level of sustainability, and they are increasingly motivated to take positive actions that are good for the environment and its reference communities. Faced with the challenge of sustainability, how will business models change, and what tools can managers and companies use to seize and overcome this socioeconomic challenge?

To answer this question and address this sustainability challenge, in recent years, many professionals, analysts, and academics have attempted to refine the Business Model Canvas into a new "framework" to consider all aspects of supporting business model innovation to promote sustainability variables. Cariplo Social Innovation LAB has also made such an attempt and achieved certain success.

The Cariplo Social Innovation LAB was created by the Cariplo Foundation to develop a comprehensive approach that applies to all sectors of the socio-economy. The platform is open to all "third sector" organizations, and their conduct preliminary theoretical and practical research on issues that work more



● Fondazione Cariplo
A charitable foundation in Milan, Italy. It was created in December 1991
https://www.fondazionecariplo.it/includes/2016/img/fondazione-cariplo.png

effectively. So they transformed the traditional business model canvas to create a new social and sustainable business canvas.

▶ **Purpose**

Overall, the Cariplo Social Innovation LAB hopes to achieve social and sustainable development through the participation of all social actors and communities. Using the canvas, companies can activate cross-departmental capacity, build philanthropic programs, foster third-department expression, and foster departmental growth in all forms of social entrepreneurship and sustainability. In particular, it aims to promote sustainable local development, enhancing the area's environmental, economic, social, and cultural resources, as well as cooperation, solidarity, and belonging, while improving the quality of human resources involved, the strategic planning process as well as the organization and management of the organization's own structure for action.

Building a social and sustainable business model canvas that provides a clear understanding of social goals provides the opportunity to not only look at the business but also identify the social impact users are trying to achieve. Most importantly, it can clearly show how these two goals interact and combine.

▶ **Step**



● THE BUSINESS MODEL CANVAS

Using this canvas, start from the value proposition at the center of the canvas, think about the social problems and beneficiaries that users want to solve, find social needs, and write down products and services users provide that create value for specific beneficiaries and customers groups. Then think about the revenue part, who are the direct and indirect beneficiaries of the user and categorize them by similar characteristics.

In addition to the beneficiaries, there will be other direct and indirect customers, and similarly users need to divide customers into segments with similar characteristics. Next, users need to think about the relationship between beneficiaries and

customers. When beneficiaries actively participate in users' social enterprises, they can also play an important role to expand social impact. Therefore, users need to think about how to reach their beneficiaries and customers, how to sell their products and services, and how to help their beneficiaries and customers to evaluate the social value generated by their organizations.

Next, users need to think about how to form partnerships. They need to increase the network of participants and identify internal and external activities that these stakeholders are involved in. Then, it is necessary to determine the core resource part, that is, the function of the product or service, the resources required to realize these, and the cost structure that should be paid for managing these. There is not only pay but also income, so the analysis of income flow is essential, the strategy of obtaining income, the source of income, the different functions of different income sources in society and enterprises, etc., And finally, analyse the results generated by the user's project, social impact, environmental impact, and cultural impact.

# 3.8  COMPARISON AND DISCUSSION

After analyzing the six design toolkits individually, I divided them into two groups for comprehensive comparison and discussion.

The first group of design toolkits to be compared together is the systemic design toolkit, platform design toolkit, and community toolkit, which are composed of multiple canvases. The feature of multi-canvas is that it has more details and complete use of sequence and logic. Users can complete the canvas one by one in sequence and follow the designer's guide to analyze and complete the design step by step. Looking at the three design toolkits in detail, the systemic design toolkit and platform design toolkit both consist of 7 canvases, while the community toolkit consists of 6 canvases. There is not much difference in the number of canvases. In terms of usage, Most of the three toolkits are completed in the form of filling in forms. The only difference is that the systemic design toolkit uses a tool called connector in the sixth step, which requires users to connect the content after filling in. In terms of content, although the purposes and uses of these three design toolkits are different, they have certain similarities in logic. In the order of the canvases,

the designers put the overall analysis canvas at the beginning and then gradually transitioned to a canvas for analyzing details, such as status analysis to role analysis. The analysis method from macro focus to micro is also a point worth learning from.

The other group put together and compared are The flourishing enterprise innovation toolkit, The business model canvas, and The Social and Sustainable Business Model Canvas, all of which consist of only one canvas. The feature of a single canvas is that it is more holistic. The user fills in the analysis content on one canvas, and all the filled-in content can directly and intuitively see the connection between them on one canvas. In terms of usage, these three single-canvas toolkits are all completed by filling in forms. Among them, the flourishing enterprise innovation toolkit and The Social and Sustainable Business Model Canvas add icons to design the form, making the canvas look more designed, and it is also more convenient for users to understand and use. On the contrary, The business model canvas uses a large number of text descriptions to give users sufficient hints. Although it is lacking in design, it is also very convenient for users to understand and use. In terms of content, the flourishing enterprise innovation toolkit has some overall framework and content integration and focus, while The business model canvas and The Social and Sustainable Business Model Canvas only tile the tables and express the content between the tables through the mutual adhesion of the forms. In addition, the difference between the two toolkits is that the business model canvas additionally changes the background color of the two tables on the basis of tiling the tables to indicate their importance of the two tables. This way of using color to accentuate points is also something I can learn from.

# 04

# GUIDELINES FOR SYSTEMIC TOOLKIT

/ METHODOLOGY

/ HOLISTIC DIAGNOSIS

/ IDENTIFICATION OF THE CHALLENGES

/ IDENTIFICATION OF THE OPPORTUNITIES

/ SYSTEMIC PROJECT

/ STUDY OF OUTCOMES

# 4.1 METHODOLOGY
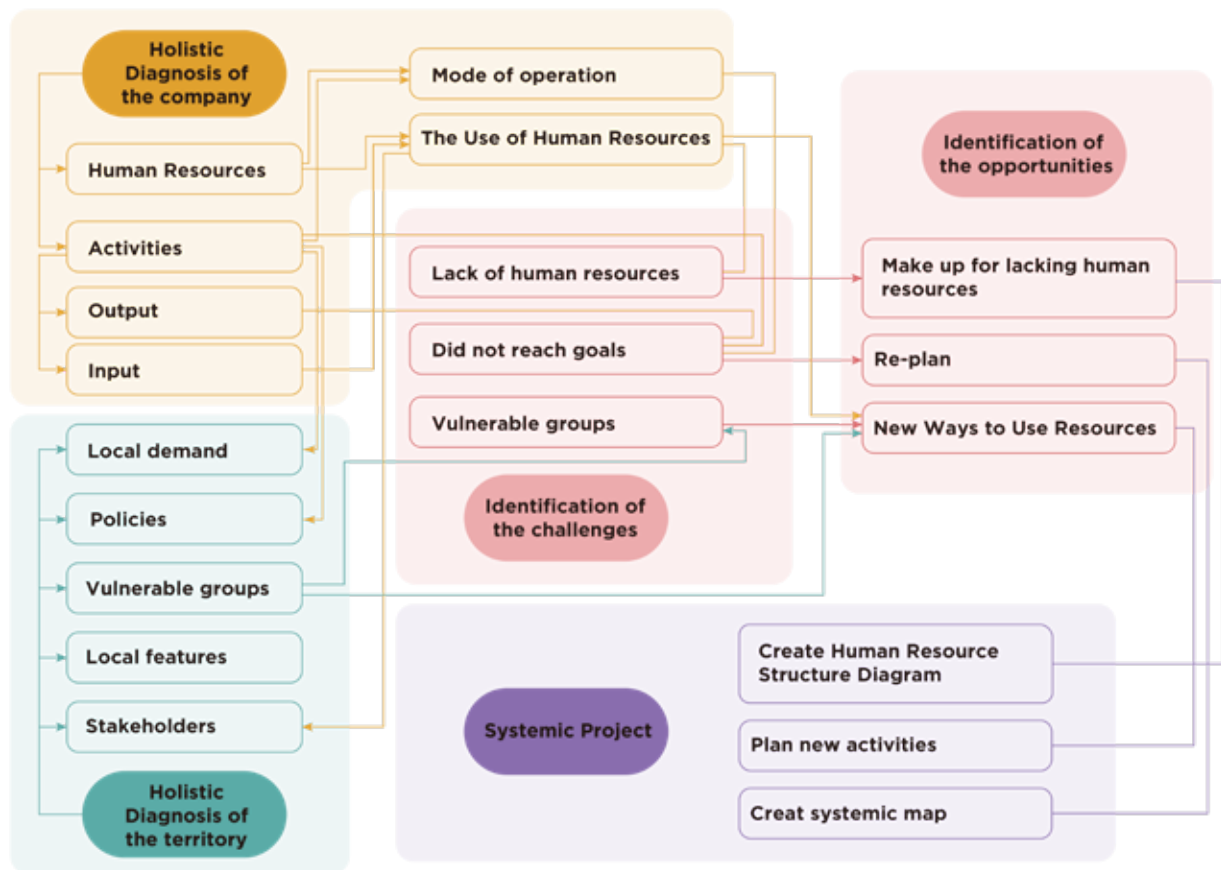


In terms of methodology, of course, I would use the methodology of systemic design. For social enterprises that want to use this tool, due to the characteristics of social enterprises in China: lack of talents, they may not have employees who have learned the professional design methodology of systemic design. Therefore, in the design of the toolkit, I will integrate the methodology of systemic design into each step of the toolkit to guide the users of the toolkit to use the methodology of systemic design to conduct a self-analysis of their social enterprises and improve their human resource structure. This kind of guidance will make it easier for users who have not learned systemic design to use this tool to conduct a systemic analysis of their social enterprises.

Usually, the first step of systemic design is the holistic diagnosis of the territory, but in order to make this toolkit more convenient for social enterprise employees to use, I will take the first step of the holistic diagnosis of the company and go further create a more detailed holistic diagnosis of the production or service business carried out by social enterprises, here I refer to the business activities carried out by social enterprises, whether it is the provision of services or products, collectively referred

to as "Activities," so what will unfold here is the holistic diagnosis of the activity. Then, according to the characteristics of the social enterprise and the characteristics of the activities they carry out, a targeted diagnosis of the territory will be carried out so that even people who are new to the toolkit, as long as they have a sufficient understanding of their own social enterprise, they can efficiently complete the use of the toolkit.

Then I incorporated the next few steps of the systemic design methodology into the toolkit. When using the toolkit, users would follow the guide to define challenges and opportunities, which are two necessary steps in systemic design. Finally, using the last two steps of the systemic design methodology, design a new human resource structure based on the relationship between the process and the participants to help the social enterprise obtain a higher value.

## 4.2 HOLISTIC DIAGNOSIS OF THE COMPANY
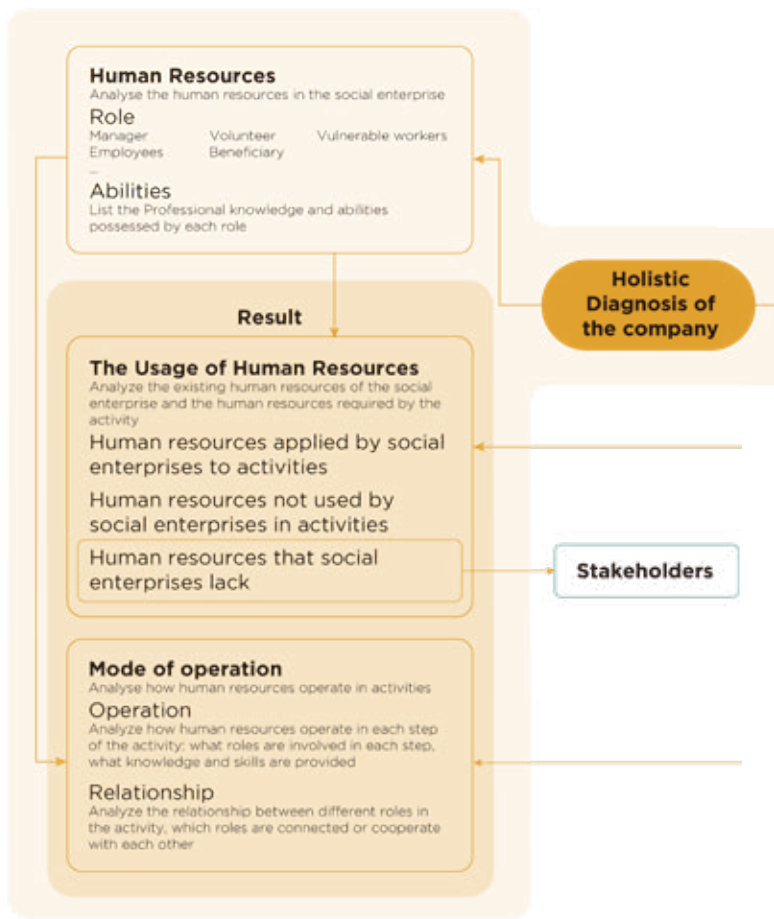


In detail, first of all, users should make a holistic diagnosis of their social enterprise, and the holistic diagnosis will be carried out from two aspects.

The first aspect is to conduct a holistic diagnosis of the social enterprise's own structure, including the history of the social enterprise, the structure of human resources, the profitability of the enterprise, and the dividend distribution of the enterprise. At this step, users will have a clearer overall understanding of their social enterprise, and especially they can see the human resource structure of their social enterprise more clearly and

intuitively. Based on my research of Chinese social enterprises, since many small social enterprises are in the early stage of development, they lack the management of human resources within the enterprise. Therefore, using tools to visualize the human resource structure of social enterprises will be of great help to Chinese social enterprises to strengthen their self-awareness.
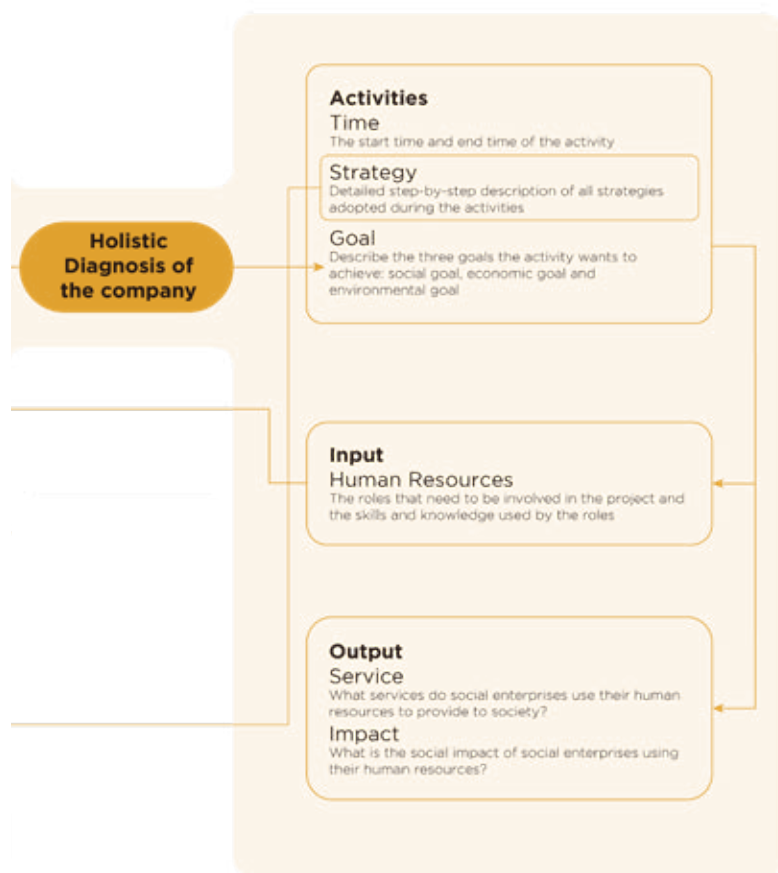
The second aspect is to go further and conduct a detailed holistic diagnosis of the activities carried out by the social enterprise. This step will be the basis for the other steps that follow. The first is the basic information of the activity, including the start time and end time, the central location of the activity, the leading equipment the activity relies on, etc. After users have a general understanding of the activity, they need to analyze each step of the activity in more detail. The users should write down the steps during the activity in detail, and which roles are involved in these steps? What kind of skills do they have? How do they use their skills at each step? What measures have been taken?

**Holistic Diagnosis of the company**

**Activities**
Time
The start time and end time of the activity

Strategy
Detailed step-by-step description of all strategies adopted during the activities

Goal
Describe the three goals the activity wants to achieve: social goal, economic goal and environmental goal

**Input**
Human Resources
The roles that need to be involved in the project and the skills and knowledge used by the roles

**Output**
Service
What services do social enterprises use their human resources to provide to society?

Impact
What is the social impact of social enterprises using their human resources?

Which of these roles are vulnerable groups that social enterprises often reach out to? What are their characteristics? Did you encounter any difficulties or problems at each step, and if so, did the problems persist, or have they been solved? If it persists, has social enterprise done anything to address it? And the reasons for the failure of the measures. Or, if no action has been taken yet, does the social enterprise have any plans to take action to address the problem? If the problems have been solved, who solved them? How did they do that?

The holistic diagnosis of the activities here is not only a generalization and sorting out of the activities of the social enterprise, but more importantly, through the use of the toolkit, people who use the toolkit are guided to reflect on the process of social

enterprise activities and the utilization of human resources, so as to find areas that need to be improved.

Although in the first part, users have already described the human resources structure of social enterprises but this is not enough. In order to better understand how human resources work in this social enterprise, we need to analyze human resources in a specific activity. Therefore, in the second part, for the human resources that have been applied to the activities, the users need to further analyze these human resources, more specifically through the source and use of these human resources. It is classified into human resources applied by social enterprises to activities, human resources not used by social enterprises in activities, and human resources that social enterprises lack. The human resources that social enterprises lack here specifically refer to the human resources outside social enterprises that are used in the activities of social enterprises. These human resources are necessary for activities but do not belong to social enterprises.

# 4.3  HOLISTIC DIAGNOSIS OF THE TERRITORY

**Local demand**
Analyze the local development demands for social enterprise activities from the following three aspects

**Social Environment**
Are there any local people or groups with demand for the activity?

**Economic Environment**
Is the local economic environment sufficient to support the activity?

**Ecological Environment**
Does the local ecological environment allow this activity?
Does the local ecological environment require this activity?

**Activities**

The next step is to conduct a targeted diagnosis of the territory based on the activities of the social enterprise, which will be closely related to the activities in the holistic diagnosis of the company in the first step. After analyzing the activities carried out by social enterprises, users should investigate the local needs of the activities according to the content and type of the activities, mainly from two aspects of social environment and economic environment.

In the analysis of the social environment, users mainly need to consider the local demand and acceptance of social enterprise activities, specifically from the following perspectives: Are there any groups in this area that have the demand for this activity? What is their need? Is there sufficient acceptance of the activity in the local social environment?

In the analysis of the economic environment, users need to start from the local economic conditions. From a person's perspective, do local residents have sufficient economic conditions to participate in the activities of social enterprises? From the region's perspective, is the local economic environment sufficient to support social enterprise activities or even further development? Is it possible to give social enterprises the possibility of financially sustainable development?
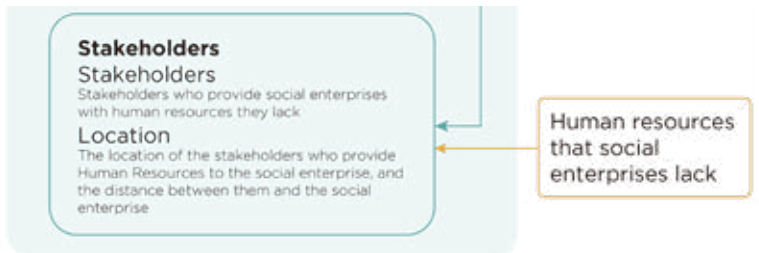


In the previous step, users analyzed the human resources that social enterprises lack. These human resources come from outside social enterprises. They can also be called stakeholders outside social enterprises. Territory analysis with stakeholders, of course linking stakeholders to their location, users should not only know whether their social enterprises are closely related to these stakeholders but also know the distance between their social enterprises and these stakeholders. At this step, social enterprises can think about whether such a distance is appropriate for the relationship between social enterprises and stakeholders? Are there situations where there is a long geographic distance from a strong stakeholder? Will this situation have a negative impact on the collaboration between social enterprises and the stakeholder? From this perspective, social enterprises also need to consider whether the inconvenience caused by such geographical distance can be alleviated by improving the human resources of social enterprises.
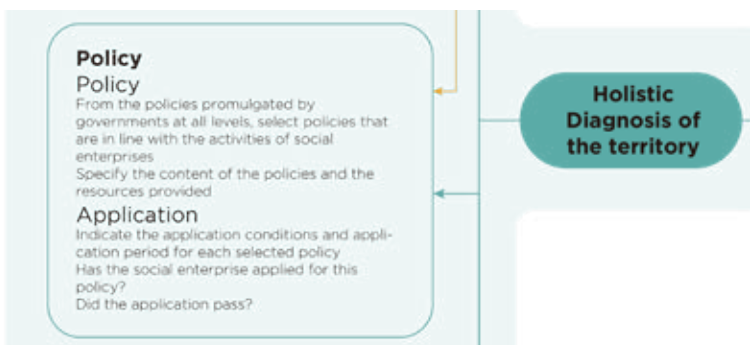


According to the previous research on Chinese social enterprises, policy support is very important for Chinese social enterprises at this stage, and China's policies are divided by region. To explain in detail, China is divided into administrative regions in the order of district-city-province-country. Governments at all levels can provide various policy support within their jurisdiction, and the policies issued by governments at all levels are applicable to all eligible enterprises within their jurisdiction. Therefore, in the holistic diagnosis of the territory, users also need to investigate policies of different scopes to find out the policies suitable for their own social enterprises to obtain

the greatest support, which will give Chinese social enterprises a great help in this challenging period. But it is not enough to simply find a suitable policy because the application of policies is a particularly important thing for social enterprises. Because social enterprises are currently heavily supported by governments at all levels in China, governments in various regions will give social enterprises some very affordable support, especially in terms of funds and sales channels. In order to prevent such policies from being maliciously abused, various governments vet applications from social enterprises to very strict standards. Therefore, it is particularly important for social enterprises to clarify the application conditions for each policy and prepare application materials according to the application conditions. When a social enterprise wants to apply for a policy issued by a certain level of government, its application needs to pass the review of various levels below that level, but whether the application can be passed or not is ultimately up to the government that issued the policy.

# 4.4 IDENTIFICATION OF THE CHALLENGES



Human resources that social enterprises lack

Identification of the challenges

**Lack of human resources**
Lack of human resources is one of the common challenges faced of social enterprises. In the previous steps, according to the activities carried out by the social enterprise, the lack of resources of the social enterprise can be analyzed in a targeted manner.
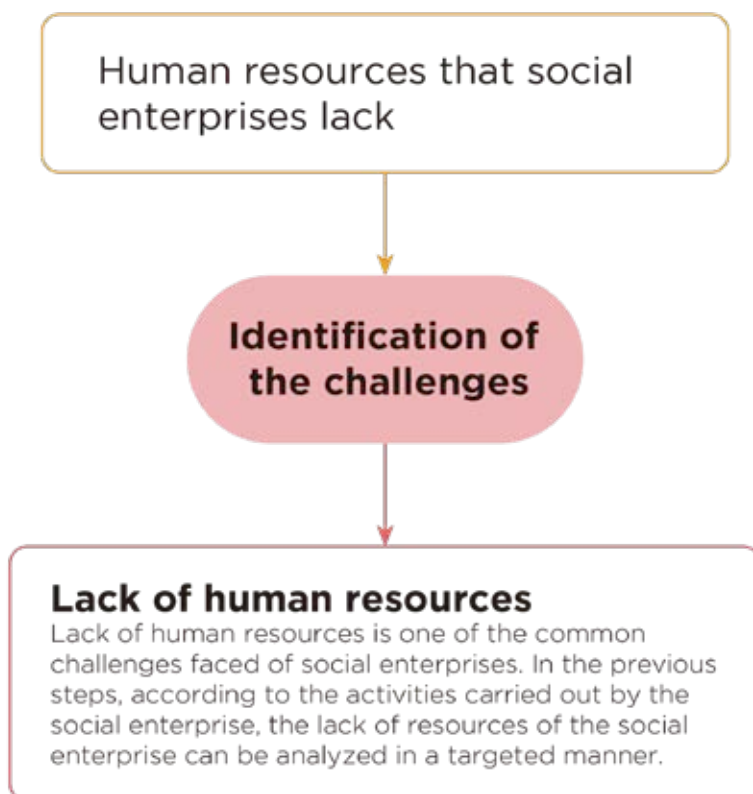
According to the methodology of systemic design, the holistic diagnosis is followed by the identification of the challenges. Of course, users will find some challenges while using the toolkit for holistic diagnosis, but they still need to express these challenges concretely. The identification of challenges is based on the holistic diagnosis of the company and the territory, but for ordinary users who have not learned systemic design, how to accurately find the challenges in the previous large number of researches will be a great difficulty. So in this guideline,

I marked out the challenges that social enterprises may have, then connected the points of challenges that may be reflected in the holistic diagnosis of the company and the holistic diagnosis of the territory in order to guide novice users to construct the toolkit to carry out systematic analysis and achieve the purpose of systemic design.

The first challenge that social enterprises may present is the lack of human resources. This is a problem that most Chinese social enterprises have, and it is also a problem that many social enterprises around the world have. But the information the user needs to get is not "we lack human resources" but "we lack this human resource or that human resource." When analyzing the company's activities, the toolkit has guided users to count the human resources involved in their social enterprise activities. Combined with the human resources owned by the social enterprise, it is relatively easy to figure out the human resources that social enterprises lack when conducting activities, then to targeted find out what human resources are the most lacking in social enterprises of users.
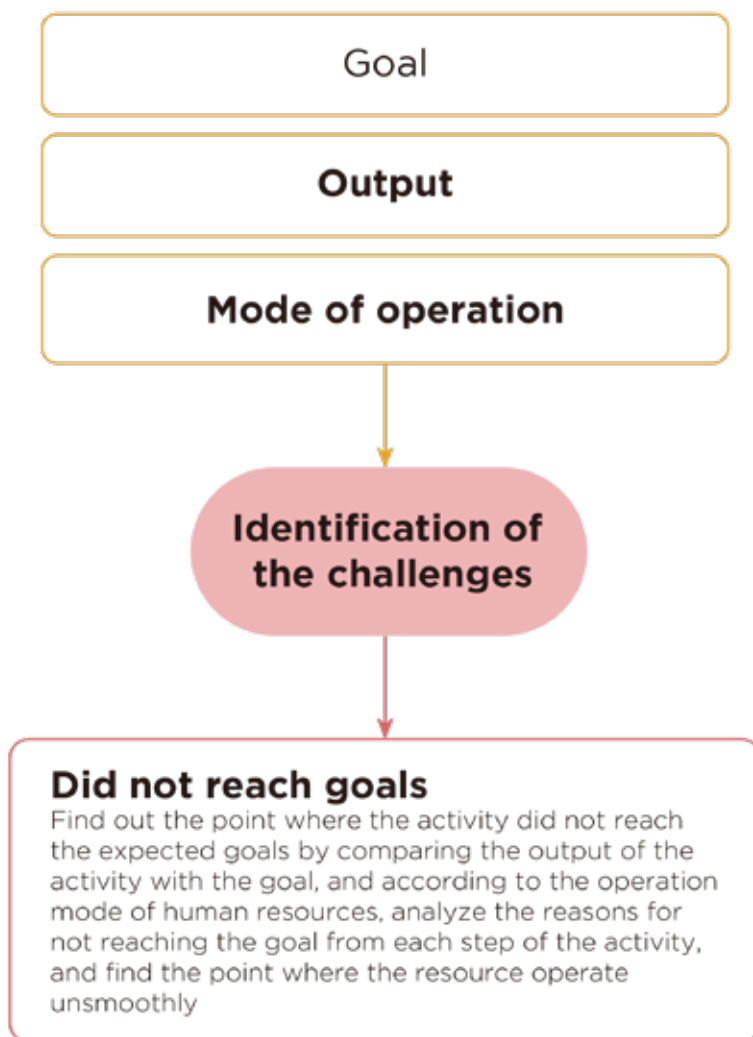
The second challenge is the inability to achieve the expected goals. As we all know, every enterprise has its own goals, whether they are commercial goals or economic goals, and social enterprises, as companies participating in market competition, of course, also have their own commercial goals and economic goals. And in today's increasingly globalized world, under the promotion of the sustainable development goals advocated by the United Nations, most enterprises also have environmental goals for themselves. As a participant of this earth, social enterprises also have certain environmental goals for themselves to achieve sustainable development. In addition, the reason why social

Goal

**Output**

**Mode of operation**

**Identification of the challenges**

**Did not reach goals**
Find out the point where the activity did not reach the expected goals by comparing the output of the activity with the goal, and according to the operation mode of human resources, analyze the reasons for not reaching the goal from each step of the activity, and find the point where the resource operate unsmoothly
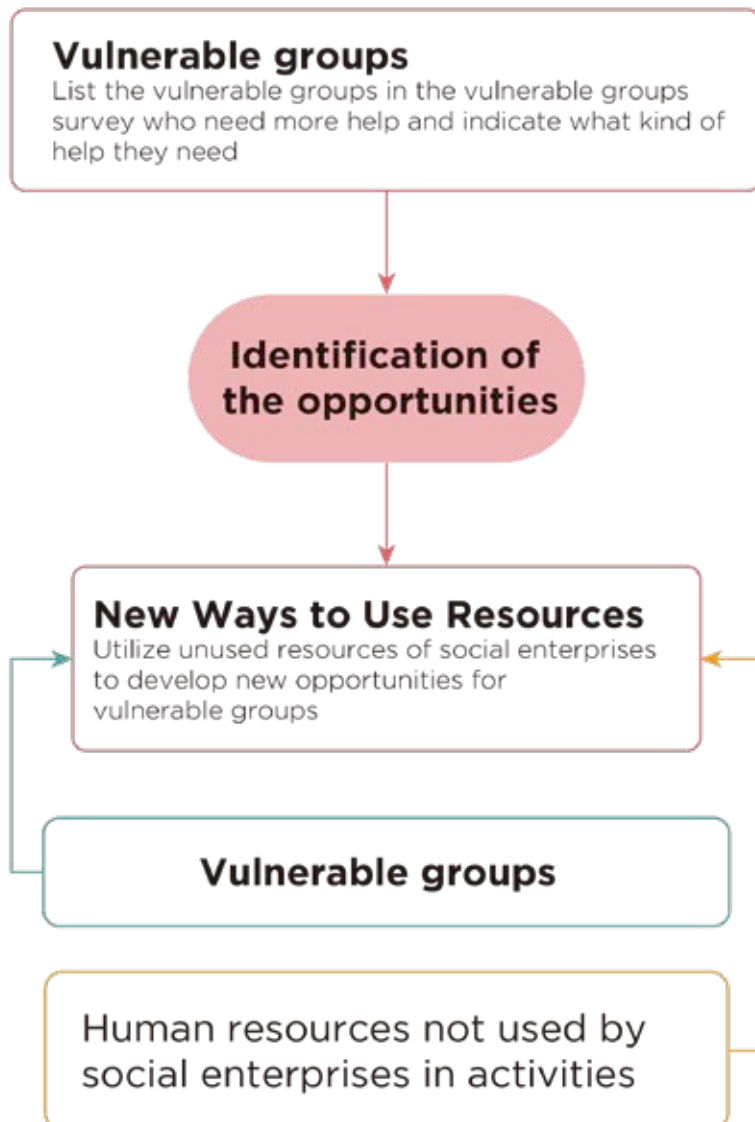
enterprises are called social enterprises is that they have social goals that are different from ordinary enterprises. Under the pressure of these multiple goals, whether social enterprises can perfectly achieve all the goals, this is challenges are also an important criterion for social enterprises to reflect on themselves. To define this challenge, users need to start from the three aspects of the holistic diagnosis of the company: goals, outputs, and mode of operation. Combining these three aspects, they first need to clarify the social goals, economic goals, and environmental goals of their social enterprises, then analyze the output of actual activities. The output here not only refers to the output of commercial products or services but also includes the social impact brought by social enterprises. By comparing the goals and outputs, users can find out which goals their social enterprises have achieved and which they have not achieved, then combine the unachieved goals with the operation mode of the activity to conduct in-depth research, and it is possible to find the reasons why the goals were not achieved. The toolkit will guide the user to combine these three aspects to jointly define the challenge of not achieving the desired goal.



**Vulnerable groups**

**Identification of the challenges**

**Vulnerable groups**
List the vulnerable groups in the vulnerable groups survey who need more help and indicate what kind of help they need
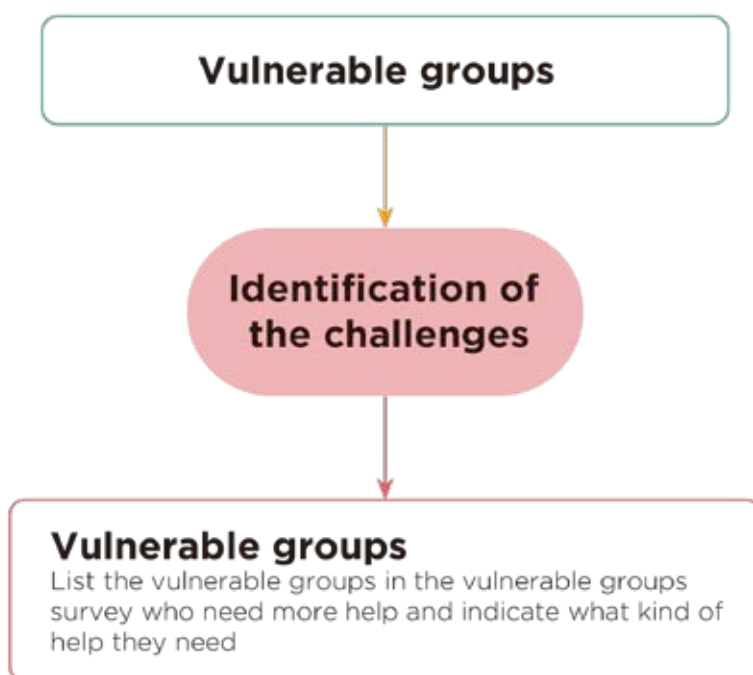
The last challenge is vulnerable groups. A big difference between social enterprises and ordinary enterprises is that social enterprises have a closer relationship with vulnerable groups. The relationship between vulnerable groups and social enterprises may be the relationship between customers and merchants, or the relationship between employees and enterprises, or the relationship between service recipients and service providers. No matter what kind of relationship, dealing with vulnerable groups is a great challenge to Chinese social enterprises because although the attention to the vulnerable groups is gradually increasing, the vulnerable groups still do not receive much social attention in China. To define this kind of challenge, users need to start with the role analysis. The employees of the social enterprise should clarify the relationship between the vulnerable groups they come into contact with and the social enterprise, whether it is their customers or the employees of their social enterprise, or other types of stakeholders. What categories

do these vulnerable groups fall into? What are their characteristics? What do they need? What impact does social enterprise have on these vulnerable groups? Do social enterprises really help these vulnerable groups? Through specific analysis of vulnerable groups, perhaps users can define the challenges of vulnerable groups.

The three challenges I propose here are just to provide some directions to guide users to think. Not every social enterprise will define all three challenges in this step, which requires users to selectively define different challenges according to the actual situation of their social enterprise.

# 4.5  IDENTIFICATION OF THE OPPORTUNITIES

Opportunities always come with challenges. In the methodology of systemic design, finding critical new opportunities always follows defining challenges. In the identification of the challenges, I provide users with three guiding ideas for thinking about how to define challenges. Similarly, in this part, I will also provide three ideas that inspire users to find new opportunities arising from challenges.

**Lack of human resources**
Lack of human resources is one of the common challenges faced of social enterprises. In the previous steps, according to the activities carried out by the social enterprise, the lack of resources of the social enterprise can be analyzed in a targeted manner.

**Identification of the opportunities**

**Make up for lacking human resources**
Social enterprises make up the human resources that social enterprises lack in activities by recruiting new human resources or educating existing employees to learn new skills

Let's start with the first defined challenge - the lack of human resources. Starting from the lack of human resources, it is not difficult to define opportunities. It is very easy to get an idea to make up for the lack of human resources. But such a simple thing is not easy for social

enterprises, especially Chinese social enterprises in the early stage of development. Readers should remember that the previous research on Chinese social enterprises mentioned that the lack of human resources in the development dilemma of Chinese social enterprises is a long-standing problem, and the current situation, such as lack of funds and lack of social awareness makes this phenomenon has not been resolved for a long time. Therefore, how to scientifically make up the lack of human resources is what truly defines opportunities. If social enterprises want to spend the least amount of money to make up the complete human resources, on the one hand, it is necessary for social enterprises to scientifically and accurately find the vacancy that needs to be filled most urgently. In other words, filling this vacancy can bring maximum benefit and value-added to social enterprises. On the other hand, it is a way to make up for the lack. There are many ways for social enterprises to make up human resources, such as recruiting new members or training existing human resources, etc. Different methods will cost different time and funds required and will also achieve different degrees of effects. Social enterprises need to choose the optimal solution suitable for their own social enterprises in light of their actual situation. No matter what kind of solution, there is no right or wrong, only suitable or unsuitable for this social enterprise. Social enterprises not only have a complete understanding of the human resource structure of their own social enterprise through the toolkit but also clarify the collaboration between various human resources and the internal funds of the enterprise. Therefore, at this time, with the help of the toolkit, they can clearly compare the positive aspects and negative aspects of each plan, then choose the most suitable one to define the new opportunity to make up human resources.

Let's next look at how opportunities are defined from the second challenge. For unachieved goals, we can think from two perspectives, one is to change the unachieved goal, and the other is to change the method, which I will collectively

**Did not reach goals**
Find out the point where the activity did not reach the expected goals by comparing the output of the activity with the goal, and according to the operation mode of human resources, analyze the reasons for not reaching the goal from each step of the activity, and find the point where the resource operate unsmoothly

**Identification of the opportunities**

**Re-plan**
Re-plan how human resources operate, take into account the newly added human resources of social enterprises and make targeted planning for points that do not meet expected goals

call re-plan.

The first one:  change the unachieved goal, which is not easy to achieve. On the one hand, I believe that each social enterprise has its own persistence in both business and social value so asking social enterprises to give up some hard-to-reach goals is not something that can be easily accepted. On the other hand, not only do social enterprises have high requirements for themselves, but society and the government also have high requirements and expectations for social enterprises. These outside scrutinies make it impossible for social enterprises to quickly lower their own goals. But everything has a certain degree of flexibility. If social enterprises realize through their previous self-analysis that their social enterprise has set goals that are too high and unrealistic, then this is their opportunity to correct their own goals to new goals that are reasonably suitable for their own social enterprise. After modifying the goals, it is natural for social enterprises to readjust their activity plans. This is one of re-plan.

The second re-plan is to maintain the current goals and re-plan new activities to achieve the desired goals based on the reasons for unachieved goals analyzed in the previous challenge and the use of the social enterprise's updated human resource structure. This re-plan approach, combined with the first new opportunity, could lead to even more significant change for social enterprise.

Defining new opportunities from the last challenge also requires combining new opportunities defined from the first challenge. When vulnerable groups exist in social enterprises as employees, they also exist in the new human resource structure that social enterprises have reintegrated. How to make better use of vulnerable groups and how to better handle the



**Vulnerable groups**
List the vulnerable groups in the vulnerable groups survey who need more help and indicate what kind of help they need

**Identification of the opportunities**

**New Ways to Use Resources**
Utilize unused resources of social enterprises to develop new opportunities for vulnerable groups

**Vulnerable groups**

Human resources not used by social enterprises in activities

relationship with vulnerable groups may become a new opportunity for social enterprises. However, I suggest users be more divergent in their thinking. In the holistic diagnosis of the company, users analyzed the human resources of their social enterprises, so in this step, they will find that some human resources are not used by social enterprises in the activity. Obviously, in a social enterprise lacking talents, the waste of human resources is a very extravagant behavior. Therefore, we should think and explore more comprehensively how to find new ways of using human resources in the new human resources structure, how to make more reasonable use of the human resources of vulnerable groups and the human resources not used by social enterprises in activities is the third idea that I provide users in the step of the identification of the opportunities.

# 4.6 SYSTEMIC PROJECT

After defining opportunities, users can design a new systemic model based on the relationship between processes and roles, and for social enterprises, this systemic model will be embodied as a relationship diagram of human resources. This human resource relationship diagram will connect the human resources within the social enterprise to find the relationship between them and form a relationship network. In such a relationship network, social enterprises can not only clearly see the relationship between employees but also see the possibility of complementary skills among employees. This will also serve as a framework for social enterprises to improve their human resources.

# 4.7 OUTCOMES

**Make up for lacking human resources**

**Outcome**

**Create Human Resource Structure Diagram**
Sort out the social enterprise structure to include newly added human resources, and to create a Human Resource Structure Diagram
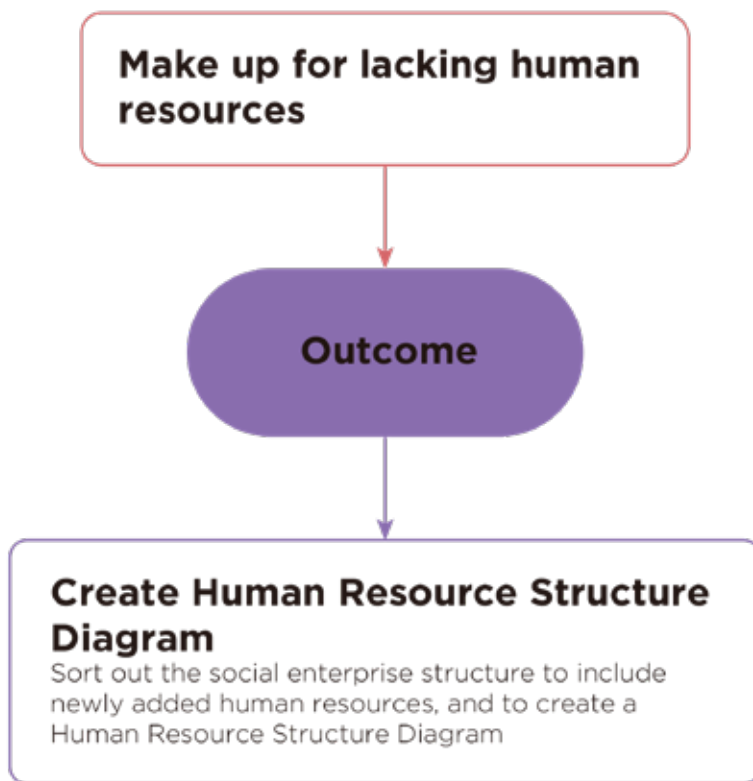
After completing the above steps, Chinese social enterprises will obtain an outcome, which includes the original human resources that have not changed, and the human resources that have been trained to acquire new capabilities on the basis of the original human resources, the newly recruited human resources. These human resources will eventually form the final outcome of this toolkit through redistribution, arrangement, and planning, and also the final outcome of the systemic design of Chinese social enterprises according to the guidelines of the toolkit - A new Social Enterprise Human Resource Structure Diagram. Whether social enterprises re-plan their activities or start new activities, this new human resource structure chart is the basis for social enterprises to start activities and also the basis for social enterprises to formulate future development strategies.

# 05

# SYSTEMIC TOOLKIT FOR CHINESE SOCIAL ENTERPRISES

/ LOGO

/ THE FIRST VERSION OF CANVAS

/ TRIAL OF THE FIRST VERSION OF CANVAS

/ THE SECOND VERSION OF CANVAS

/ TRIAL OF THE FINAL VERSION OF CANVAS

/ THE FINAL CANVAS

# 5.1 LOGO

Before designing the canvas of the toolkit, I first created the logo of the toolkit based on my overall framework for this Chinese social enterprise design toolkit and the purpose I envisioned it to achieve.



FONT: Lato Black    Lato Hairline

COLOR:    #3C7875    #59A5A1    #B1D9DD

Social enterprises usually bring hope to some vulnerable groups, and at the same time, they have some gritty qualities that enable them to achieve their social goals. Therefore, in the choice of the main color, I choose to use a green with low saturation and lightness to give readers a feeling of hope, calm, and perseverance. And use a darker and a lighter green to achieve a gradient color effect.



CHINA

SOCIAL ENTERPRISES
SYSTEMIC DESIGN TOOLKIT

C    +    S

As for the design of the logo shape, I extracted the letter C from China and the letter S from social enterprise and systemic design. I made many attempts at the combination of these two letters, but in the end, I chose to let the letter C contain the letter S to express that this project of systemic design and social enterprise is based on the social background of China. I connected the letter C and the letter S and added a gradient effect to them so that they look like a continuous ribbon to express my hope that social enterprise and systemic design will continue to develop in China and have a profound effect on influences.

SYSTEMIC
DESIGN TOOLKIT
CHINESE SOCIAL ENTERPRISES

SYSTEMIC
DESIGN TOOLKIT
CHINESE SOCIAL ENTERPRISES

Finally, the words "SYSTEMIC DESIGN TOOLKIT CHINESE SOCIAL ENTERPRISES" are added to the right side of the graphic, and the combination of the fonts Lato Black and Lato Hairline makes the whole logo looks more flexible.

# 5.2 THE FIRST VERSION OF CANVAS

## 5.2.1 CANVA1



Canva1 is "Partial Diagnosis of Social Enterprise." The name of the social enterprise can be filled in at the top of this canvas, and the vertical table on the left that occupies the entire left side of this canvas is the Development Path of the social enterprise. The form is composed of a circular form and a square form. The time is filled in the circular form, and the specific event and more details that the user wants to fill in are filled in the square form. From top to bottom, users need to fill in the foundation of social enterprises, obtain social enterprise certification, and major events in chronological order. The right side of the Development Path table is divided into upper and lower parts. The upper part consists of the Social Goal form and the Social Enterprise Structure form. The Social Enterprise Structure form requires users to fill in the social enterprise department,

department manager, department size, and department function. The lower part is also composed of two forms. One is used to analyze the business of the enterprise. The user must clarify the business model of the social enterprise, what products or services the social enterprise provides to customers, what technology this business relies on, And how much revenue and expenses this business brings. Another table is to analyze the profit distribution of the entire social enterprise to clearly list the profit distribution of the social enterprise by percentage, which is also one of the responsibilities that social enterprises must clarify.

## 5.2.2 CANVA2



Canva2 is "Partial Diagnosis of Activity." It has the same design as canva1: fill in the name of the activity analyzed at the top of this canvas, and then the whole table is used to describe and analyze the activity in detail. First, users need to write down their workflow steps from top to bottom, then write down the roles required for each step, and list the vulnerable group workers separately. Both general roles and vulnerable group workers need to be distinguished according to the internal and external social enterprises. The corresponding skills used in these roles in this step should also be filled in the "Skills" according to the internal and external social enterprises. Finally, combine the previous roles and skills to describe in detail how they operate in this step to complete the detailed description of the activity.

## 5.2.3 CANVA3

Canva3 is "Partial Diagnosis of Territory." This map is divided into four blocks according to the shades of color, representing four different regions: out of China,
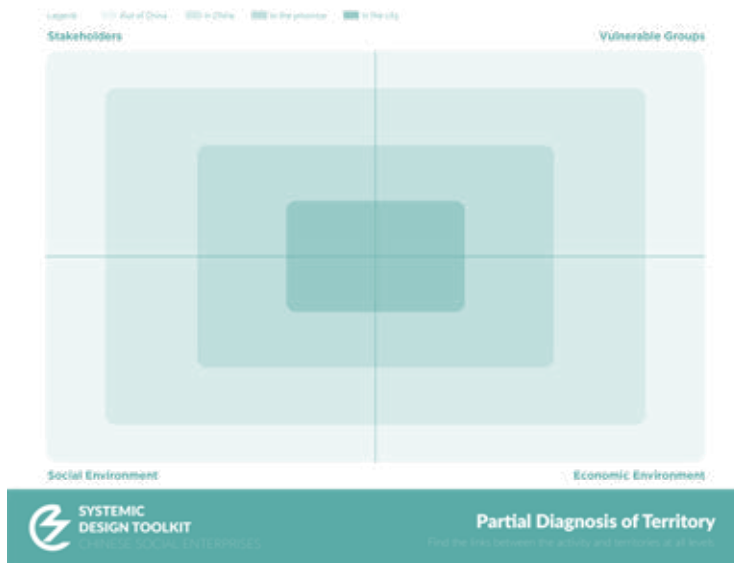
in China, in the province, and in the city. The entire map is divided into four quadrants. The first quadrant is used to fill in the stakeholders of the activity, the second quadrant is used to fill in the status of vulnerable groups related to the activity, and the third quadrant is used to fill in the social environment of the social enterprise's activities, while the fourth quadrant is used to fill in its economic environment.

## 5.2.4 CANVA4

Canva4 is "Completion Analysis," which is a semi-circle form used to analyze the various goals of social enterprises and their completion status. The semi-circle form is equally divided into three sectors by radius, which is used to analyze social goals, economic goals, and environmental goals of social enterprises respectively. The space for each goal is divided into three parts. From the outside to the inside, the content that needs to be filled in in order is the Goal, the Service taken by the social enterprise to achieve the goal, and the Impact of this service. In this canvas, it is recommended that users use post it to fill in the Goal form, which will be more convenient in subsequent use.

# 5.2.5 CANVA5



Canva5 is "Supporter," which is divided into two separate forms, one for analyzing the relationship map between supporters of the activity and one for enumerating policies for supporting activities. The relationship map is divided into three parts, find the roles that meet these three relationships of assistance, conversation, and cooperation, fill them in the role form in turn, and then use percentages to indicate the degree of these relationships. The policy form is to fill in the Content, Level, Application Conditions, and Application Progress of the policy supporting activities in turn. If there is a policy for not passing the application, then users can fill in the reason for the failure of the application and the missing conditions in the last column according to the needs.

# 5.2.6 CANVA6



Canva6 is "Human Resource Training." The first thing the user has to do is to find out who can be trained. There are two overlapping boxes at the top of this canvas. One box is used to fill in Human Resource Used in the Activity, and the other box is used to fill in Human Resource Inside the Social Enterprise. Where the two boxes overlap each other represent human resources inside the social enterprise and also be used in the

activity, so it means human resources applied by social enterprises to activities. There are also two parts that do not overlap, one is human resources used in the activity but not inside the social enterprise, so it is the human resources that social enterprises lack. Another is human resources inside the social enterprise but not be used in the activity.

The area in the middle of the canvas is the content of the training. The left is the organization that provides the training and the cost of the training. The right is the person or organization inside the social enterprise that provides the training. Finally, at the bottom of the canvas is the new human resources after training. Users need to use lines to connect the three parts from the trainable human resources to the training content to the new human resources from top to bottom.

# 5.2.7 CANVA7
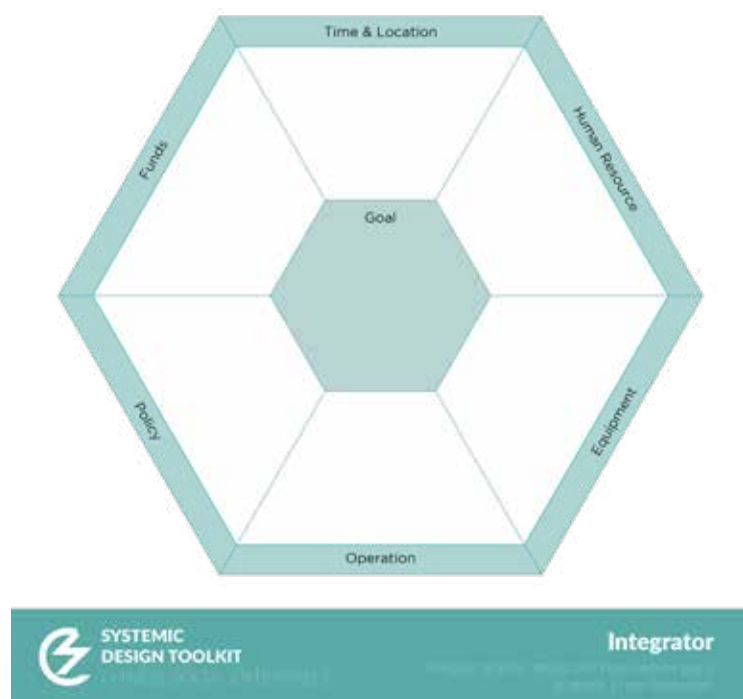


The last canvas is the integrator, which is used to integrate the content of the previous six canvases. Starting from the Goal in the center of this canvas, the user can transfer the post-it with the Goal in canva4 to here, and integrate the previous canvas around this goal to fill in time, address, human resources, equipment, operations, policies, and funds in turn. These contents filled in are new contents born in the use of the design toolkit, such as new human resources born after training.

# 5.3  TRIAL OF THE FIRST VERSION OF CANVAS

## 5.3.1  INTRODUCTION OF QIANLIN BABY

QianLinBaby (Beijing) Bio-TechCo., Ltd. (hereinafter referred to as QianLin Baby) is located in the Chinese capital Beijing Fengtai Zhongguancun Science and Technology Park. It is China's first national-level high-tech industrial development zone, the first national independent innovation demonstration zone, and the first national-level talent special zone. It is also the core park of the Beijing-Tianjin Stone High-tech Industrial Belt. Zhongguancun Science and Technology Park is a test field for China's system and mechanism innovation, and it is also the economic lifeline of Beijing. It is known as "China's Silicon Valley."



- Qianlin baby logo
  It is composed of golden rice bowl and ginkgo leaf. Ginkgo leaf represents health, which means that PKU children are eating healthy food with golden rice bowl.
  http://www.qianlinbaby.com/upload/201910/1572502652.jpg

Qianlin Baby was founded by Wang Runming. "The company was established in 2011, and the name was taken from my child." Wang Runming, CEO of Qianlin Baby, was introduced to me. Wang Runming's child is a PKU patient, and his original intention of founding Qianlin Baby was that at that time, the food suitable for PKU patients in China was very limited.



- Wang Runming
  He is the founder of Qianlin Baby and a father of a child with PKU
  https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9GcTEuZbv88-KrUzquupSHymocKaSSrwA7_iWdg&usqp=CAU

The full name of PKU is phenylketonuria, which rarely appears in front of the public. It is a rare genetic metabolic disease with an average population incidence of less than 1/10,000. In people with this disease, due to the lack of or insufficient activity of an enzyme in the body, phenylalanine (an amino acid that makes up protein) cannot be decomposed and metabolized in the body, and it accumulates in the blood and damages the brain, being stupid, self-harm, and even die. Since natural proteins contain 4%-6% phenylalanine, which is far beyond the health limit that patients can bear, they must strictly control their diet, which means that they will spend their whole life with meat, eggs, milk, soy products insulate, and even ordinary rice is also like poison to them. In countries outside of China, patients with rare diseases are taken care of by the government. For example, in Maryland, the United States, the

government provides special milk powder and protein powder for free until the child is 18 years old; Japan provides free treatment and milk powder and protein powder until the age of 20. After the age of 20, patients only need to pay 30% by themselves. But in China, taking Beijing as an example, milk powder and protein powder are only provided free of charge until the child is six years old, and then they are all at their own expense, which is very expensive. What's more expensive is that some PKU patients also need to take medicine for life. The price of this medicine in Japan is 3-5 million yen (equivalent to 20,000-36,000 euros) per month, and the government reimburses 70%. But China currently does not import the drug.

"I have come into contact with the first batch of parents of PKU children in China." Wang Runming said, "When there was no food, these parents took the train to Tianjin to find a kind of dried sweet potato, cut off the hard edges and ground it into powder, and brought it home to give their kids to eat, this powder is said to be low in protein."

In the first two years of its establishment, Qianlin Baby sought PKU special food agents all over the world. They successively cooperated with Swiss Buhler Food Manufacturing Co., Ltd., Japan Health Food Co., Ltd., Japan Mude God Food Co., Ltd., and Japan Kewpie Foods. Co., Ltd., Italian APROTEN Company, American Cambrookfoods Company, American BD Company, and many other domestic and foreign enterprises cooperate. Compared with personal purchases, corporate agency purchases are more convenient, and at the same time, the discounts that can be obtained are relatively high. But in general, the price of imported food is still high, and patients need to eat for life, which is a big burden to every family.



- Swiss Buhler Food Manufacturing Co., Ltd. logo
  https://www.buhlergroup.com/etc.clientlibs/buhlergroup/clientlibs/clientlibs-base/resources/images/icons/Logo-Invers-theme-color_4x.svg



- Italian APROTEN Company logo
  https://aproteico.it/wp-content/uploads/2020/09/244.jpg



- Japan Kewpie Foods. Co., Ltd. logo
  https://www.kewpie.com/assets/img/index/kv-logo_sp.png

In order to further reduce the price of PKU food, Qianlin Baby began to cooperate with Beijing Capital Children's Research Institute, and cooperated with scientific research institutions and pharmaceutical companies to develop and produce domestic high-quality low-protein food of its own brand. Over the years, they have never stopped working on food innovation. Qianlin Baby has transformed the

simplification of PKU children's food into diversification in China, enriching children's diets, introducing advanced foreign formulas into China, and independently developing low-protein healthy foods that are more suitable for the growing needs of Chinese children, allowing children have more balanced nutrition.



PKU Food Products in Qianlin Baby
http://www.qianlinbaby.com/upload/202009/1599728996.jpg

Not only that, Qianlin Baby also joined hands with a number of foundations and patient organizations to carry out donation activities all over China, benefiting tens of thousands of PKU children, at the same time, increasing the confidence of parents to let their children grow up healthily and happily.

Many of the employees working in Qianlin Baby are the family members of PKU children. They have worked tirelessly to make contributions in their own jobs, bringing hope to other parents. Qianlin baby is a big family of PKU full of love. Qianlin Baby will, as always, provide professional and systematic services for people with a low-protein healthy diet, launch more high-quality, safe, nutritious, healthy, and delicious food and supplies, and work hard to change the dietary restrictions of PKU groups and improve the quality of life.

## 5.3.2  CANVAS FILLED IN BY QIANLIN BABY

Qianlin Baby's company is located in Beijing, China, and since I'm in Turin, Italy, we can't communicate face-to-face. When I was looking for social enterprises in China to use the toolkit, I sent a lot of emails to different social enterprises, but most of them did not reply. The staff of Qianlin Baby not only replied to the email but also gave me an hour to communicate with two Qianlin Baby employees (Ma Shen and Fang Beishu) in an online meeting, and there was a brief 10-minute interview and communication with Mr. Wang Runming, the founder of Qianlin Baby. During the meeting, I introduced them to who I am and what I'm working on now, and I also introduced them to the toolkit I designed, how they were used and why I designed it. They also enthusiastically introduced Qianlin Baby to me and expressed a certain interest in my subject. At my request, they agreed to try out my kit, and for the

second half of the meeting, I led the two of them together to complete the first two canvases of the toolkit.

Due to lack of time, we didn't finish the later canvases together in the meeting, but I sent the entire toolkit and the toolkit's usage guide to Fang Beishu, the employee in Qianlin Baby, and we exchanged the contact information of WeChat. Fang Beishu completed all the following canvases, including the evaluation form, in his spare time in the next few days. Of course, we also had some communication on WeChat during the period. He mentioned to me some difficulties he encountered when using the toolkit, and I gave him some answers. In addition to some suggestions on the evaluation form, he also gave me some of his reviews and experiences feelings in using the first version of the toolkit in daily communication.

The use of first version of the toolkit by Baby Qianlin used a total of two staff members, and the accumulated time was about 2 hours.

## Canva1
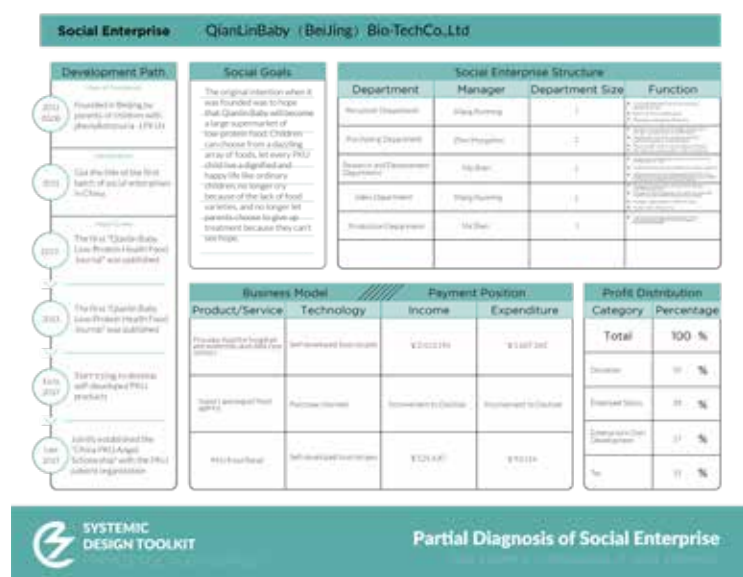


Canva1 is The holistic diagnosis of Qianlin Baby Company. In this canvas, we can clearly see the development process of Qianlin Baby: Qianlin Baby was founded on March 8, 2011, by the parents of children with PKU in Beijing, China, and in 2015 passed the social enterprise certification, which is one of the first enterprises in the country to obtain the title of social enterprise. 2013 was a turning point for Qianlin Baby. This year, they began to independently develop PKU food. Before that, they were only the agents of PKU food from all over the world to China. In order to let everyone pay more attention to PKU children and PKU food, Qianlin Baby also published the "Qianlin Baby Low-Protein Healthy Food Journal" in 2013. The content of this journal includes the introduction of low-protein foods and health products, the nutritional composition table of various foods, the relevant knowledge of scientifically feeding children with PKU, and Chinese and Western food recipes suitable for children with PKU.

In order to further encourage children with PKU and their parents, Qianlin Baby and PKU foundation established the China PKU Angel Scholarship in early 2017. Scholarships are awarded to PKU children who are admitted to a university or achieve excellent results in a certain field every year to encourage them to move on. At the end of 2017, Qianlin Baby established a "Happy Station" and cooperated with hotels and homestays around the country to provide PKU children with green travel and worry-free care programs. It takes away the hardships of parents carrying kitchen utensils and heavy food.

The social goals of Qianlin Baby are also mentioned in the introduction to Qianlin Baby in the previous article. Just like the original intention when it was founded:"I hope that Qianlin Baby will become a large supermarket of low-protein food, children can choose from a wide variety of foods, so that every PKU child can live a dignified and happy life like ordinary children, no longer sadness and tears because of the lack of food types, no longer let parents choose to give up treatment because they see no hope."

Then there is Qianlin Baby's corporate structure. They encountered obvious difficulties in filling out this step. Since Qianlin Baby is a small social enterprise composed of only six regular employees, they do not have strict division of departments, but each person is responsible for certain content of work, mutual cooperation, and mutual help. In order to fill in the form of this social enterprise structure, they temporarily divided the departments according to the work content that each person is mainly responsible for and worked hard to complete the form.

In the profit distribution form, Qianlin Baby, as a social enterprise, promised the government to donate half of its annual net profit to the development of PKU-related activities and the rescue of PKU children, contributing to the development of the PKU cause. Since it has obtained the social enterprise certification, it only needs to pay 15% of the business income tax, while other companies pay 20% to 35%. Other profits are used for employee wages and the company's own development.

SYSTEMIC DESIGN TOOLKIT

Partial Diagnosis of Activity

## Canva2

Canva2 is the partial diagnosis of the activity. Qianlin Baby chose to diagnose the activity of retailing PKU food in an online store because this activity is the focus of Qianlin Baby's development, and it is also a difficulty in the development of Qianlin Baby. They chose to diagnose this activity because they hoped to take this opportunity to try out the toolkit to help their social enterprises to break through.

In the column of Workflow Steps, they wrote down the name of each step in the order of the activities, starting with the Registration of a business license for a registered food business, and then in the column of Roles, they wrote down the roles that Qianlin Baby needs to use in this step. Here, according to the toolkit, they divide the roles into roles within the social enterprise and roles outside the social enterprise and list the vulnerable workers on the right side separately.

The general role in the first step of social enterprise is Personnel Department Staff (Wang Runming). The vulnerable workers in the social enterprise include Parents of children with PKU. They possess business experience and communication skills. And the general role outside the social enterprise is the Staff in the Food operation supervision and management department. The skill they have is Audit ability. Specifically, in the first step, they have the following operations: Send all self-developed PKU foods to the National Food Quality Inspection and Testing Center for testing, Qualified test report and food business license to be obtained, and Send application form and other necessary documents to Market Supervision Administration, waiting for approval.

The second step is Online shop maintenance. The internal roles of social enterprises involved in this step are Staff in Sales Department, and their skills used are: Communication skills, Computer ability, Text description ability, and the external roles of social enterprises have Staff in Taobao Online shop platform, the skills used are: Audit ability, Communication skills, Ability to build the underlying, structure of the online store, in this step, all roles cooperate with each other to perform the following operations: First, they need to register on Taobao.com, then upload the

food business license to Taobao staff for review, after passing, cooperate with Taobao staff to build an online store structure, upload product pictures, and product informations, their online store is categorized by product series, including Qianlin Foods, Huaxia Foods, Shengjianyuan Foods, and imported food, Modules for hot-selling products and new products are also separated separately.

The third step is called Process the order. This step only needs to use the role of staff in the Sales Department in the social enterprise. They need to use computer ability and Online shop management experience to perform the following operations: Sort out the orders received by Taobao online store, Verify warehouse inventory, and Arrange warehouse shipments.

The fourth step is called Arrangements for delivery. The internal roles of social enterprises involved in this step are Staff in Sales Department, and the skills used are: Product packaging, Filling out the shipping order, Communication Skills, and Financial Management. The external employees of social enterprises are Staff In Courier Company, the skills used are: Delivery service capability. In this step, all roles cooperate with each other to perform the following operations: Pack the received orders to ensure the safety of the goods during transportation, Print the order as a courier note and paste it on the courier box, and Verification each package, contact the courier, hand over the package, Pay the bill for courier charges.

The last step is called Customer service reception of customer problems and after-sales service. The internal roles of social enterprises involved in this step are Staff in Sales Department, and the skills used are: Communication skills, Understanding PKU Conditions, Have some understanding of food cooking. The external employees of the social enterprise are Staff in Courier Company, and the skills used are Delivery service capability. In this step, all roles cooperate with each other to perform the following operations: Respond to inquiries from online shop customers, Including pre-purchase consultation and post-purchase consultation on cooking, etc. Provide after-sales services, such as return and exchange, etc.

The staff of Qianlin Baby reorganized the entire process of their online store retail activities through text when they were in canva2. At the same time, they also found some problems during the process. So they gave me feedback that maybe I could add a section to this page for them to write down the problems and difficulties they faced while doing the activity. This way, the user will have a complete understanding of the entire activity.

**Canva3**
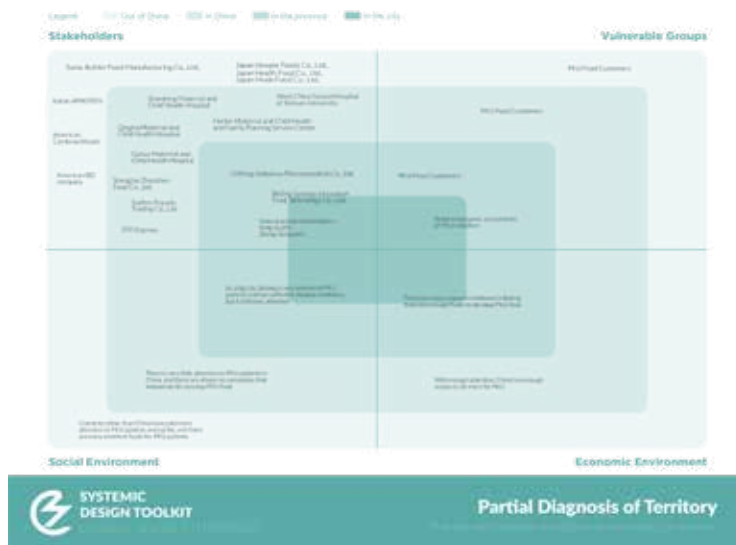
On this canvas, Qianlin Baby fills in a large number of stakeholders, mainly some of the companies they cooperate with, hospitals, maternal and child health care centers, etc. Although Beijing is a city, it is at the same level as the province. Therefore, Qianlin Baobei fills in the stakeholders in Beijing within the province and the city. The stakeholders in Beijing include Chifeng Saibainuo Pharmaceutical Co., Ltd., which invested in Qianlin Baby, Beijing Synergy Innovation Food Technology Co., which developed PKU food, and Natural person shareholders: Song Guizhi and Zheng Hongshen. The domestic stakeholders are medical institutions around the country, including West China Second Hospital of Sichuan University, Shandong Maternal and Child Health Hospital, Qinghai Maternal and Child Health Hospital, and Gansu Maternal and Child Health Hospital, as well as food raw material factory Shanghai ZhunshenFood Co., Ltd. and Suzhou Fuyuda Trading Co., Ltd., the food processing factory responsible for processing and producing all the food products of Qianlin Baby, and the cooperating courier company STO Express.

The vulnerable groups in the upper right corner of the map are some employees who are parents of PKU children and PKU customers from all over the world.

The lower part of the map is used to analyze the environment of Qianlin Baby's analysis activities in various regions, and the left side is used to analyze the social environment. For Qianlin Baby's R&D and sales of PKU food business, Beijing, as a big city, is very tolerant of PKU patients and has sufficient medical conditions, but it still lacks attention, and also in the whole of China, people's attention to PKU patients is very low, and there are almost no companies that independently develop PKU food, while the international situation is better. Other countries outside of China have paid more attention to PKU patients, and earlier, there were also many high-quality foods suitable for PKU patients.

Regarding the economic environment, there are many research institutes in Beijing that have enough funds to develop PKU food. From the perspective of China, there are also many fund organizations in China that support PKU food-related causes if PKU patients can get enough attention.
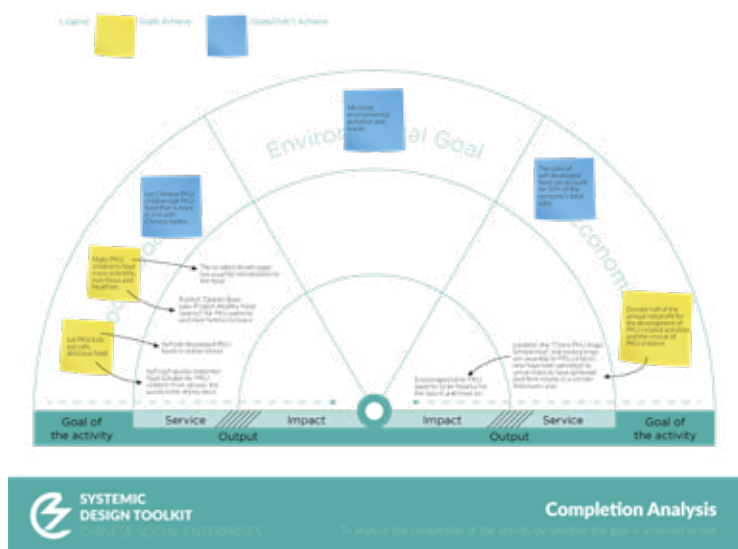
**Canva4**

Qianlin Baby used post-it in Canva4 according to the guide I provided them. They used yellow post-its to represent goals achieved and blue post-its to represent goals they didn't achieve. Qianlin Baby has some realized social goals, such as Letting PKU kids eat safe, delicious food. The services to achieve this goal include selling self-developed PKU foods in online stores and selling high-quality imported food suitable for PKU children from all over the world in the online store. Another achieved goal is to Make PKU children's food more scientific, nutritious, and healthier. To achieve this goal, Qianlin Baby Published "Qianlin Baby Low-Protein Healthy Food Journal" for PKU patients and their families to learn and wrote The product details page has a partial introduction to the food. Among the social goals, there is still a goal that has not been achieved, Let Chinese PKU children eat PKU food that is more in line with Chinese tastes. This is because the current production and sales volume of Qianlin Baby's self-developed food is not enough.

In terms of environmental goals, Qianlin Baby does not have a clear environmental goal, but as a member of the earth, Qianlin Baby also hopes to minimize environmental pollution and waste as much as possible.

In terms of economic goals, Qianlin Baby has completed the goals of donating half of the annual net profit for the development of PKU-related activities and the rescue of PKU children. They established the "China PKU Angel Scholarship," and scholarships are awarded to PKU children who have been admitted to universities or have achieved excellent results in a certain field every year. This act encourages some PKU patients to be hopeful for the future and move on.

For canva4, users from Qianlin Baby believe that social enterprises will have more social goals, so it is not reasonable to allocate space to three goals, which will cause them to not have enough space to fill in the social goals while the other two have lots of empty space evenly.

**Relationship Map**

| Processes | 100% tot | Role1 | Role2 | Role3 |
|---|---|---|---|---|
| Assistance | 10 % | Sales Department of Qianlin Baby (Beijing) Biotechnology Co., Ltd. | Taobao Merchant Assistant | |
| Conversation | 40 % | The Research and Development department of Qianlin Baby (Beijing) Biotechnology Co., Ltd. | PKU Food Research and Development Team of Beijing Synergy Innovation Food Technology Co., Ltd. | |
| Cooperation | 50 % | The Research and Development department of Qianlin Baby (Beijing) Biotechnology Co., Ltd. | PKU Food Research and Development Team of Beijing Synergy Innovation Food Technology Co., Ltd. | PKU food production line of Shanghai Zhunshen Food Co., Ltd. |

**Policy supports for Activity**

| Policy content | Level | Application Conditions | Application Progress | Missing Conditions (optional) |
|---|---|---|---|---|
| The business income tax rate of social enterprise is 15% (20%~35% for general enterprise) | National Level | | Application Approved | |
| A one-time subsidy of 200,000 yuan, 500,000 yuan or 2 million yuan will be given to Zhongguancun high-tech enterprises | City Level | | Application Approved | |
| | City Level | | Application Failed | |

SYSTEMIC DESIGN TOOLKIT    Supporter

## Canva5

Canva5 is divided into two parts. The upper part is the relationship map. For the assistance, Qianlin Baby's employees believe that there is an association between the Sales Department of Qianlin Baby (Beijing) Biotechnology Co., Ltd. and Taobao Merchant Assistant, but throughout the entire process of activities does not account for a large proportion, only about 10%. There are many conversations between The Research and Development department of Qianlin Baby (Beijing) Biotechnology Co., Ltd., and the PKU Food Research and Development Team of Beijing Synergy Innovation Food Technology Co., Ltd., occupying 40% of the entire activity process. In general, the most cooperative relationship is in The Research and Development department of Qianlin Baby (Beijing) Biotechnology Co., Ltd., PKU Food Research and Development Team of Beijing Synergy Innovation Food Technology Co., Ltd., and PKU food production line of Shanghai Zhunshen Food Co., Ltd. The relationship of cooperation can reach a ratio of 50%.

The second half is Policy supports for Activity, where they selected some of the three policies that most benefited their social enterprise and filled them in. Policy 1 is a policy that applies to all certified social enterprises in China. It is a tax reduction for social enterprises: the business income tax rate of social enterprises is 15% (20%~35% for general enterprises). The following conditions are required to be supported by this policy: Get certified as a social enterprise, The enterprise has no bad records, The enterprise exists in accordance with the law and continues to operate normally. At present, Qianlin Baby has successfully passed the application for this policy and enjoys this benefit.

The second policy is within the scope of Beijing, and the content of the policy is a one-time subsidy of 200,000 yuan; 500,000 yuan or 2 million yuan will be given to Zhongguancun high-tech enterprises. To successfully apply for this policy requires Qianlin Baby meets the following conditions: The company is located in Zhongguancun High-tech Park, The company has no bad records, and The enterprise exists in accordance with the law and continues to operate normally. Fortunately, Qianlin Baby fully meets the above conditions and successfully applied for this policy

support.

The third written policy content is: Support innovative pilot enterprises to carry out pilot work such as technology platform construction, technological transformation, R&D and industrialization, application demonstration projects, patent standard creation, brand management, international operation, investment, and financing, etc., which is also a municipal policy promulgated by the Beijing Municipal Government and needs to meet the following conditions: The company is located in Zhongguancun High-tech Park, The company has no bad records, The enterprise exists in accordance with the law and continues to operate normally, The sum of the technical income of a high-tech enterprise and the sales income of high-tech products shall account for more than 60% of the total income of the enterprise for the year. But Qianlin Baby was rejected when applying for this policy, because they failed to meet the condition of "the sum of the technical income of the high-tech enterprise and the sales income of high-tech products accounts for more than 60% of the total income of the enterprise for the year". That is, the sales of self-developed food are not enough. This is also one of the reasons why Qianlin Baby strives to increase the production and sales of self-developed products. Only by increasing the income of self-developed products can we enjoy more welfare policies.

Regarding canva5, users from Qianlin Baby have given a lot of feedback. First of all, they are not very good at using the relationship map because each relationship has a connection, so they are very hesitant to fill it out. Secondly, the role of the relationship map is not very obvious because the people involved in the operation have been described in detail in canva2. It is a bit delayed and redundant to describe the relationship of these roles in canva5. And the relationship map cannot be well connected with the content of the following policy, which looks more like two separate canvases. For the policy form in the second half, Baby Qianlin believes that it is not enough to fill in only three policies. Although a social enterprise may apply for dozens of policies, it is not necessary for us to list all the policies one by one, but for social enterprises, there are far more than three policies that are very important to obtain a large source of support, which also makes them very hesitant to fill in the form, and they choose the three policies in the form after careful consideration. Therefore they propose to increase the number of policies in this form.
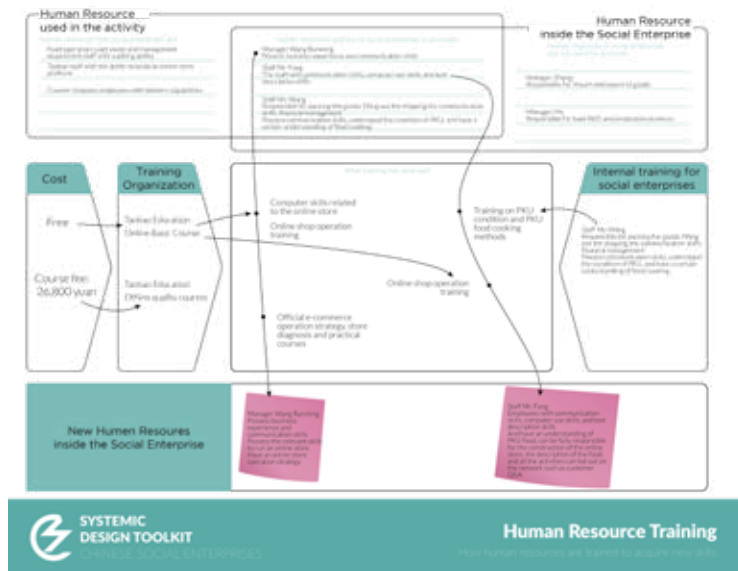
## Canva6

In Canva6, users filled in the relevant information of human resources training for the activity of Qianlin Baby retailing self-developed products online. First of all, they need to clarify which human resources need to be trained. Since Qianlin Baby is a very small company, other human resources who are not involved in online retail activities are also responsible for many other businesses, so in this human resources training, they only focused on the training of Human resources applied by social enterprises to activities.

The training is mainly for two employees. One is Manager Wang Runming, who possesses the business experience and communication skills. In order to further develop the business online, a manager needs to learn more knowledge and skills of online sales, while the store's platform, taobao.com, provides free online basic courses for novice merchants, but it is not enough to have the basic knowledge. Manager Wang also needs to learn more about official e-commerce operation strategy, store diagnosis, and practical courses, so he also continued to study Taobao Education Offline quality courses provided by taobao.com, which cost 26,800 yuan.

Another employee who needs training is Staff Mr. Fang, a newcomer who has just joined Qianlin Baby, but he has communication skills, computer use skills, and text description skills. Usually he manages the online store in cooperation with Staff Ms. Wang, but for the further development of the online store and the specific division of work, Manager Wang believes that Staff Mr. Fang needs to learn more online store-related knowledge and skills so that he can quickly have the ability to independently manage the online store, while Staff Ms. Fang needs to learn more about the online store. Staff Ms. Wang will also carry out Training on PKU conditions and PKU food cooking methods for Staff Mr. Fang so that he will have an understanding of PKU food, can be fully responsible for the construction of the online store, the description of the food, and all the Activities carried out on the network such as customer Q&A. And Ms. Wang can also devote her energy to only managing warehouse and delivery-related work so that everyone's work scope and responsibilities are clearer, which may make social enterprises have a clear and more smooth operation.

**Canva7**
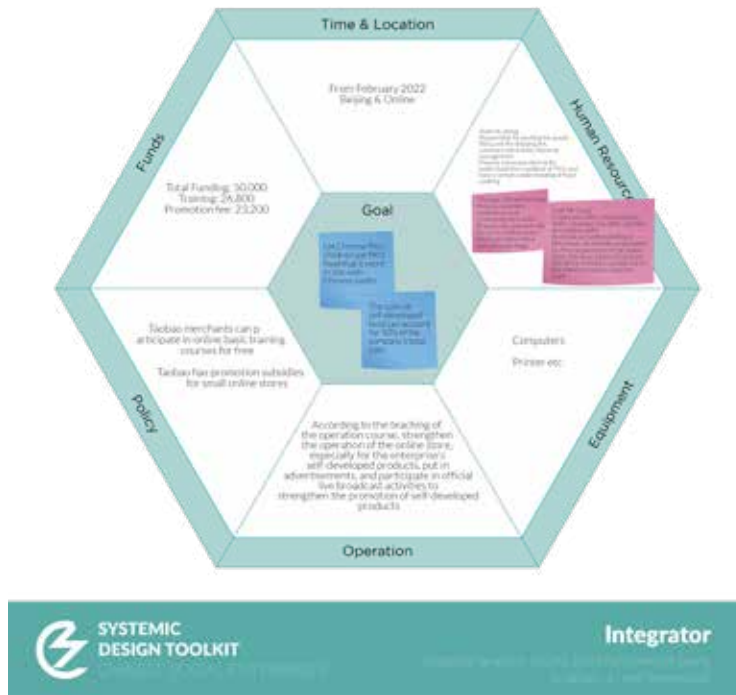
Canva7 is a summary of all the previous canvases. Qianlin baby will paste the blue post-it that says the unfinished goal in canvas5 in the goal box. In order to achieve this unfinished goal, Qianlin Baby is preparing to improve the operation of the online store from February 2022. The locations are mainly in Beijing and online. Like most social enterprises, Qianlin Baby also lacks financial support, so at present, they have only prepared 50,000 yuan as the current fund, of which 26,800 employees are used for training employees, and the remaining 23,200yuan will be used to promote the online store. In the human resources column, they also moved the post-it in canva6 with the new human resources, including Manager Wang Runming, who possesses the business experience and communication skills, possesses the relevant skills to run an online store, and has an online store operation strategy. Staff Mr. Fang, Employees with communication skills, computer use skills, text description skills, And have an understanding of PKU food can be fully responsible for the construction of the online store, the description of the food, and all the activities carried out on the network such as customer Q&A. The policies they rely on include Taobao merchants can participate in online basic training courses for free, Taobao has promotion subsidies for small online stores, and the devices they rely on include Computers, Printers, etc. The specific operation is ccording to the teaching of the operation course, strengthen the operation of the online store, especially for the enterprise's self-developed products, put in advertisements, and participate in official live broadcast activities to strengthen the promotion of self-developed products.

# 5.3.3 EVALUATION FROM QIANLIN BABY



**Evaluation of Chinese Social Enterprise Systemic Design Toolkit**

| | Usability | Purposiveness | Applicability | Enlightenment | Overall Evaluation |
|---|---|---|---|---|---|
| | Do you think it is simple to use it? | Do you think it achieves the purpose of the designer? | Does this apply to your social enterprise? | Does it inspire you more about social enterprise? | What do you think of it as a whole? |
| | no ● → ● yes | no ● → ● yes | no ● → ● yes | no ● → ● yes | bad ● → ● good |
| CANVA 1 | ●●●●○ | ●●●●● | ●○○○○ | ●●○○○ | ●●●●○ |
| CANVA 2 | ●●●●● | ●●●●● | ●●●●● | ●●●○○ | ●●●○○ |
| CANVA 3 | ●●●●○ | ●●●●○ | ●●●●○ | ●●●○○ | ●●●●○ |
| CANVA 4 | ●●●○○ | ●●○○○ | ●●●○○ | ●●●●○ | ●●●●● |
| CANVA 5 | ●●●●● | ●●●●○ | ●●●●● | ●●●●● | ●●●●○ |
| CANVA 6 | ●●○○○ | ●●●●○ | ●●●●● | ●●●●● | ●●●●● |
| CANVA 7 | ●●●●○ | ●●●○○ | ●●●●● | ●●●●● | ●●●●○ |
| TOOLKIT | ●●●●○ | ●●●●○ | ●●●○○ | ●●●●● | ●●●●○ |

**Maybe you have other suggestions, please tell me here**

Some forms need to fill in a lot of content, but the box is too small, and some forms do not need to fill in a lot of content, but are very empty, it is recommended to improve the distribution of the form.

For this version of the toolkit, users from Qianlin Baby think that the content setting is very interesting. Most of the guidelines can clearly express the designer's intention. At that time, some canvases still have some content deficiencies. For example, there is a lack of an enumeration of the problems faced by social enterprises in Canva2, and there are some content setting problems in Canva5: the connection between tables is rigid and lacks logical connections. In terms of use, this toolkit is also somewhat lacking, especially in the space for tables. Some forms need to fill in a lot of content, but the box is too small, and some forms do not need to fill in a lot of content but are empty. It is recommended to improve the distribution of the form.

## 5.4 THE SECOND VERSION OF CANVAS

In response to the feedback from Qianlin Baby, I made improvements to the toolkit, and then the second version of the canvas was born.

## 5.4.1 CANVA1



Canva1 has been changed to the Holistic Diagnosis of Social Enterprises. The main content of the canvas has not changed, but the arrangement and space size of the forms have been improved. Social Goals, Business Models, Payment Position, and Profit Distribution are placed in one row, while the social enterprise structure is separate and is placed on the lower half of the canvas to provide more space for the user to fill in. At the same time, considering that the scale of social enterprises in China varies greatly and the organizational structure is not fixed, I changed the structure diagram to a general framework without restricting the shape of the structure diagram, which allows users to more freedom to create a social enterprise structure diagram.

## 5.4.2 CANVA2

Canva2 has been changed to the Holistic Diagnosis of the Activity. Based on the first version, the form of activity time, location, and equipment has been added to make the analysis of the activity more comprehensive. The form for the specific analysis of activities has also been improved. First, operations and workflows are put together in the first column, and the content of the "Problem" is added to the last column. In

this way, when users sort out the process of the activity, they can also directly write down the difficulties and problems in the activity on this canvas. With this improvement, users can comprehensively analyze their social enterprise activities, so I changed the title of canvas2 from partial diagnosis to holistic diagnosis of activities.

# 5.4.3 CANVA3
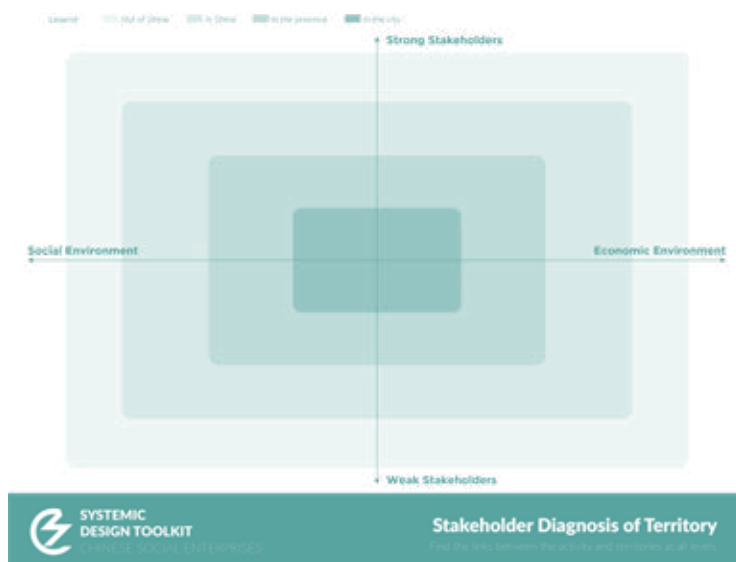


Canva3 has been changed to Stakeholder Diagnosis of Territory, but the maps that use different shades of color to represent different regions have not changed. However, the quadrants were originally used to fill in different topics, but now the content is filled in with the horizontal and vertical axes representing four different topics. On the horizontal axis, the left is the social environment, the right is the economic environment, and on the vertical axis, the top is the strong stakeholder, and the bottom is the weak stakeholder.

## 5.4.5 CANVA5

Canva4 is changed to Policy. Here, the first version of canva4 and canva5 are exchanged in order, the relationship map is deleted, and the analysis policy is focused instead. This is because policies are very important to current Chinese social enterprises, whether in the previous survey or in the feedback from Qianlin Baby using the first version of the toolkit. The content of the policy form is no different from the first version, but in terms of space design, the space for level and Application Progress is reduced, and the other three spaces are added, making this table more reasonable in use.

## 5.4.5 CANVA5

Canva5 was changed to Output Analysis, which is the content of canva4 in the first version of the toolkit, and was changed to the fifth canvas in the order of use. The content of the canvas has not changed, but according to the user feedback of the first edition, I put the social goal in the middle and increased its use of space and proportion. This change makes the social goal of the social enterprise become the main body, which is more in line with the nature of social enterprises. In the naming of the canvas, since the canvas

uses the output to analyze whether the goal is completed, the name of the canvas is changed to Output Analysis.

## 5.4.6 CANVA6



Canva6 is a new canvas before canva7. It requires each employee of the social enterprise to fill in separately. This canvas is a circle, and the name and position of the employee of the social enterprise are filled in in the middle. Then users answer six questions according to their actual situation and ideas. After everyone has filled out their own forms, users are required to put the forms together, find the connections between them, and use arrowed lines to express the relationship between employees.

## 5.4.7 CANVA7
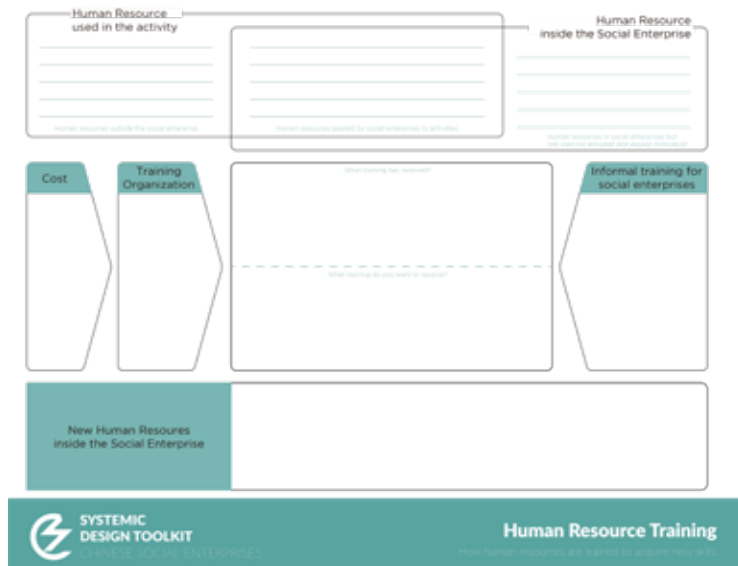


Canva7 is still Human Resources Training. Different from the first version, the content of the training is subdivided into the training employees are receiving and the training employees want to receive. Such a subdivision not only organizes the current HR training but also plans for future HR training.

# 5.4.8 CANVA8
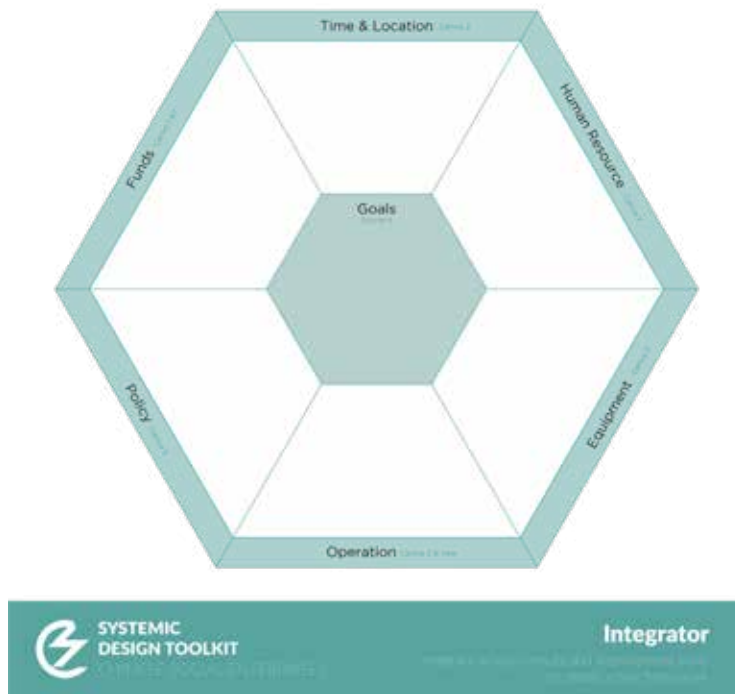


Canva8 is still an Integrator. The difference from the first version is that I added a prompt to the title of each content that needs to be filled in to remind the user which canvas the content came from, which is not only more convenient for the user to use It also emphasizes the purpose of this canvas to integrate the content of all previous canvases.

# 5.4.9 CANVA9



Canva9 is also a new canvas, which is the outcome of this toolkit: what new changes have been made to the structure of social enterprises after the first eight canvases have been used by social enterprises? This new social enterprise structure diagram is the final result of the social enterprise having a systemic design under the guidance of the toolkit.

# 5.5  TRIAL OF THE FINAL VERSION OF CANVAS

## 5.5.1  INTRODUCTION OF POWER SOLUTION

Shenzhen Power-Solution Ind Co., Ltd. (hereinafter referred to as Power-Solution) is a national high-tech enterprise in China.

*Li Xia, general manager of the company, said:*

*"As a small private manufacturing enterprise, more than 200 employees of the company put forward the business philosophy of Work for BOP and Bring BOP Up (BOP refers to the poor with a daily income of less than 2 US dollars), focusing on the use of green Energy improves the quality of life of the world's poor and helps people in poverty-stricken areas in Asia and Africa solve real problems."*

In 2009, Power-Solution began to try to design solar energy products to solve user lighting. Through continuous exploration and improvement, a new product called Candles Killer was born. This is a cheap solar lantern customized for the BOP people, developed and produced by Li Xia and her team through a large number of field investigations in Africa. So far, Power-Solution has transformed from a purely commercial foreign trade company into a social enterprise and officially entered the clean energy industry.



- Power-Solution Logo
https://www.power-solution.net.cn/cn/wp-content/uploads/2021/03/logo.png



- Candles-Killer
https://www.power-solution.net.cn/cn/wp-content/uploads/2021/03/Candles-Killer-3.jpg

However, the road to entrepreneurship has not been smooth. First of all, because Power-Solution's service population is relatively special, most of them are low-income people and have limited ability to pay. Therefore, the company needs to have supportive solutions behind the innovation model. The company must design and develop it so that the poor can afford it and use it for a long time. Secondly, for particularly remote areas, how to get through the last mile of local transportation is also a real problem. In order to minimize the cost of use, Li Xia and her team also omitted the light stand of the Candles Killer product and replaced the light stand with discarded mineral water bottles that can be seen everywhere. The solar flashlight, also launched by Li Xia, uses the height of the fuselage as a bracket, which

is convenient for poor students to use as a learning lamp.

In addition, with the investment of research and development funds and the upgrading of programs, the risk of failure faced by enterprises is also increasing. Although the profit is relatively low, they will reinvest 40% of the annual profit into the research and development of the second year and maintain the continuous innovation of solutions and


Li Xia and her team
https://www.power-solution.net.cn/cn/wp-content/uploads/2021/03/Banner.jpg

service upgrades. This is how, in the face of difficulties, Li Xia and her colleagues still did not back down, and they have always been committed to changing the status quo of impoverished areas through education. Li Xia said that there are no schools in the poor areas of Asia, Africa, and Latin America, and there are no good teachers. The children there start farming very early and do not pay enough attention to education. In order to popularize local basic medical education, Li Xia and her colleagues educate people in poverty-stricken areas on how to prevent malaria and other diseases by providing solar-powered equipment. It is understood that this kind of solar-powered media equipment, in addition to the traditional lighting and mobile phone charging functions, is also equipped with a 7-inch display screen. Even in the

case of no electricity, the device can ensure the transmission of content through solar energy. "By improving the local education level and awareness of disease prevention, the mortality rate can be greatly reduced, and finally, through education changes, the problem of poverty can be completely solved. This is a long-term and difficult process, and the effect may not be seen in a short period of time. But it is necessary. Only in this way can we truly solve poverty to help BOP people." Li Xia believes.


Countries covered by Power-Solution products
https://www.power-solution.net.cn/cn/wp-content/uploads/2020/02/maps.jpg

Since then, Li Xia has further optimized and upgraded the product in 2018, launched a new product line, realized the recharge and use of solar lamps in extremely underdeveloped areas, and also created conditions for product sellers in these areas to carry out "rental sales" and "installment payment." At present, Li Xia and her team have obtained more than 60 patents, and the products were certified by the "Lighting Global" project (Lighting Global) awarded by the World Bank in

2012. To this end, they continue to develop and swear to change the world with the best products. By the end of 2018, the solar products produced by Li Xia had been exported to 63 developing countries, including Asia, Africa, and Latin America, benefiting more than 4.42 million households, covering more than 30 million people, and effectively reducing carbon dioxide emissions by nearly 3.3 million tons.

When talking about the future development direction of the company, Li Xia said that the company had served the poor for 12 years since 2009. In the next ten years, they will continue to persevere and use more innovative solutions to meet the needs of people in poor areas in Asia and Africa. It is hoped that more Chinese manufacturing and Chinese technology can go out and that people in poverty-stricken areas can fall in love with Chinese manufacturing and recognize Chinese manufacturing.

*Said by Li Xia:*

*"What we do is not black technology, but to empower the poor through design and innovation, so that everyone can enjoy clean energy. In the future, we will continue to develop equipment that can help the poor to increase their income, such as Solar farm machinery, refrigerators, processing equipment, etc., which are used to improve the lives of local people."*

# 5.5.2 CANVAS FILLED IN BY POWER SOLUTION



Holistic Diagnosis of Social Enterprise
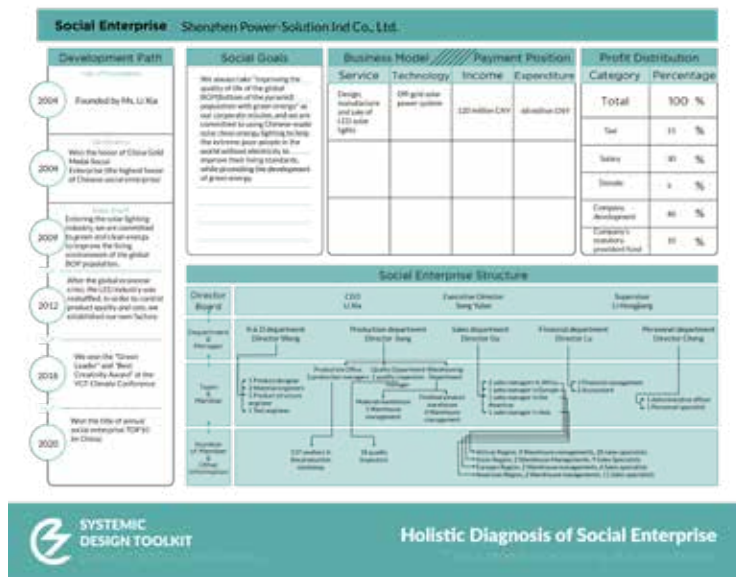
**Canva1**

Canva1 is a holistic diagnosis of Power-Solution. In this canvas, we can clearly see the development process of Power-Solution: Power-Solution was established in Shenzhen, China, in 2004 by Ms. Li Xia and was certified as a social enterprise in 2018. Won the honor China Gold Medal Social Enterprise, which is the highest honor of Chinese social enterprise.

In 2009, Power-Solution entered the solar lighting industry. They are committed to green and clean energy to improve the living environment of the global BOP population. After the global economic crisis in 2012, the LED industry was reshuffled. In order to control product quality and cost, they established our own factory.

In 2018, they won the "Green Leader" and "Best Creativity Award" at the YGT Climate Conference, and in 2020, they won the title of annual social enterprise TOP10 in China

The social goal of Power-Solution is, as Ms. Li Xia said in the interview: We always take "improving the quality of life of the global BOP(Bottom of the pyramid) population with green energy" as our corporate mission, and we are committed to using Chinese-made solar clean energy lighting to help the extremely poor people in the world without electricity to improve their living standards while promoting the development of green energy.

Power-Solution has been focusing on the solar light industry since 2009, so their business model is only to Design, manufacture, and sale of LED solar lights, and the main technology they rely on is the Off-grid solar power system, and this business has brought Power-Solution a turnover of 120 million yuan and an expenditure of 68 million yuan.

In terms of profit distribution, first of all, Power-Solution, like all Chinese social enterprises, only needs to pay 15% of the business income tax, 30% of the profit is used to pay the wages of employees at home and abroad, and 5% of the profit is donated to various fund organizations every year, the remaining 50% are reused for the enterprise itself, of which 40% is used for enterprise development, and the other 10% is used as the Company's statutory provident fund.

Then there is the social enterprise structure of Power-Solution. First, the director board of Power-Solution has three main characters, namely CEO Li Xia, executive director Song Yulan and supervisor Li Hongjiang. Further down, Power-Solution consists of five departments, namely the R&D department, production department, Sales department, Financial department, and Personnel department. Each department has a department director. Among them, the R&D department consists of 6 people. Besides director Wang, there is also a product designer, a product structure engineer, two material engineers, and a test engineer. In terms of numbers, the production department is the largest of the five departments of Power-Solution. The production department is divided into three small departments: Production Office, Quality Department, and Warehousing Department. The Production Office is jointly managed by two production managers. One 137 workers in the production workshop. The Quality Department is managed by a quality inspection manager who manages 18 quality inspectors. Finally, the Warehousing Department is divided into two parts, one is the Material warehouse, which is managed by one Warehouse management, and the other is the Finished product warehouse, which is jointly managed by four Warehouse managers. From the perspective of regional distribution, the Sales department is the most widely distributed department in Power-Solution. In addition to director Gu, this department has 5 sales managers. Among them, two sales managers are responsible for the business in Africa, and the remaining 3 sales managers are responsible for business in Europe, America, and Asia. In addition to sales managers, in the African Region, there are 4 Warehouse managers and 20 sales specialists. In Asian Region, there are 2 Warehouse Managements and 9 Sales Specialists. In the European Region, there are 2 Warehouse managers and 6 Sales specialists. While in American Region, there are 2 Warehouse managers and 11 Sales specialists.

The tables of the improved enterprise structure are free, so it is not too difficult for Power-Solution employees to use, but since Power-Solution is a social enterprise with a large number of people and a clear division of labor, the existing table space is not enough for them. For this reason, they used post-its to add some extra space to complete the sorting out of the enterprise structure diagram, but it is inconvenient for both users and readers. Therefore, the users of Power-Solution put forward

some revisions in the space of form and scale.

## Canva2

Power-Solution will, of course, analyze their only activity at canva2: Design, manufacture, and sale of LED solar lights. This activity started in 2012, mainly designed and produced in China, and sold all over the world. The main relied on equipment are four products currently sold by Power-Solution: Solar reading light, Solar lantern, Solar Home Lighting System, and Multifunctional Solar Home System.

The process is divided into five steps. The first step is Product development, and the specific operation is to Investigate the global BOP population, design solar light products according to their needs, material engineers and the structural engineer revise the product design plan, test engineer tests the produced product prototypes, finance evaluate the products, and after the overall plan is approved by the board of directors approval, it can be put into production. In the first step, roles within the social enterprise are required, including R & D department Director Wang, Product designer, Material engineers, Product structure engineer, Test Engineer, and Financial department Director Lu. Their skills include Research ability, Designing ability, and Pricing power. And the role outside the social enterprise Shenzhen Jiyang Precision Mould Co., Ltd is responsible for making product prototypes and molds. Since this toolkit was filled out by the staff of the R&D department, they only wrote about some problems encountered by the R&D department. In the step of Product development, the main problems encountered by the R&D department are the Lack of specialized researchers, they intend to iteratively design the product, focusing on the recyclability of the product reuse area, but the R&D activities in this area have encountered bottlenecks.

The second step is Product production. The production department plans and designs the product production process and assigns tasks to each workshop supervisor. The workers in every workshop produce each product according to the

requirements, the quality inspector conducts quality inspection on the produced products, and the products that pass the inspection are uniformly recorded in the finished product warehouse. The Finance Department makes price corrections on products based on actual production conditions. This step involves many human resources within social enterprises, including Production department Director Jiang, Production managers, Quality inspection manager, Workers in the production workshop, Warehouse management in the Material warehouse, Workshop supervisor, Quality inspectors, and Warehouse management in the Finished product warehouse, Provides skills of Manufacturability and Pricing power.

The third step is Product sales, which is mostly done overseas. Salesperson sales in various regions conduct commercial sales with local dealers, major companies, or the government and send the sorted orders to warehouse managers. The Finance Department organizes and records orders. Roles in social enterprises include Sales department Director Gu, Sales managers in each region, Warehouse management in each region, and sales specialists in each region, and the skills used in this step include Sales ability, Communication skills, and Financial management ability. The roles outside social enterprises involved in this step include Distributors around, Local governments, Charitable associations, and United Nations Development Programme, etc., all of which are organizations that have a partnership with Power-Solution to sell products.

The fourth step is Product Shipping. Warehouse managers carry out unified delivery according to the orders in each region, and the warehouse management of each region will then carry out more detailed order delivery processing. The roles involved in social enterprises include Warehouse management in the Finished product warehouse and Warehouse management in each region, providing Warehouse management capabilities and Order processing capabilities. Participating roles outside social enterprises include Domestic and overseas transportation companies, which provide Transport capacity.

Since the R&D department did not have a lot of participation in the three steps from the second to the fourth, the staff of the R&D department who filled out the form in these three steps did not write down their questions.

The fifth and final step is After-sales. The sales staff in each region are responsible for after-sales service for product usage and other issues and collect feedback information. Warehouses in each region need to recycle damaged products. Collect typical damaged parts and send them back to the head office for quality inspection. The roles involved are Warehouse management in each region, Sales managers in

each region, Quality inspectors, Sales specialists in each region, and Sales specialists in each region. Communication skills and Product Quality Inspection Capability were used. Roles outside social enterprises include Domestic and overseas transportation companies and Distributors around. Transport capacity and Product use feedback are used. In this step, the R&D department believes that it's very difficult to update the design in response to product feedback.

## Canva3



Users from Power-Solution fill in the stakeholder in the vertical axis of Canva3, the upper part is the strong stakeholder, and the strong stakeholder in Shenzhen is Shenzhen Jiyang Precision Mould Co., Ltd., Which is the company that develops product prototypes and molds for Power-Solution, the strong stakeholders in the province are Guangzhou Tongming Solar Technology Co., Ltd. and Dongguan Maoke Plastic Materials Co., Ltd. They are the companies that provide Power-Solution with solar technology and plastic raw materials. A strong stakeholder in China is Jiangxi Hengli Battery Technology Co., Ltd., which is a company that provides battery technology for Power-Solution. The strong stakeholders outside China are Distributors around the world. On the weak stakeholder side, the weak stakeholder in Shenzhen is Skyworth Group Co., Ltd., which had some technical exchanges and training with Power-Solution in 2018, so it is classified as a weak stakeholder, while the other is United Nations Development Programme, also in 2018 Power-Solution received an order from the United Nations Development Programme. A weak stakeholder also outside of China is TOTAL ENERGY COMPANY. Power-Solution cooperated with TOTAL ENERGY COMPANY once in 2020.
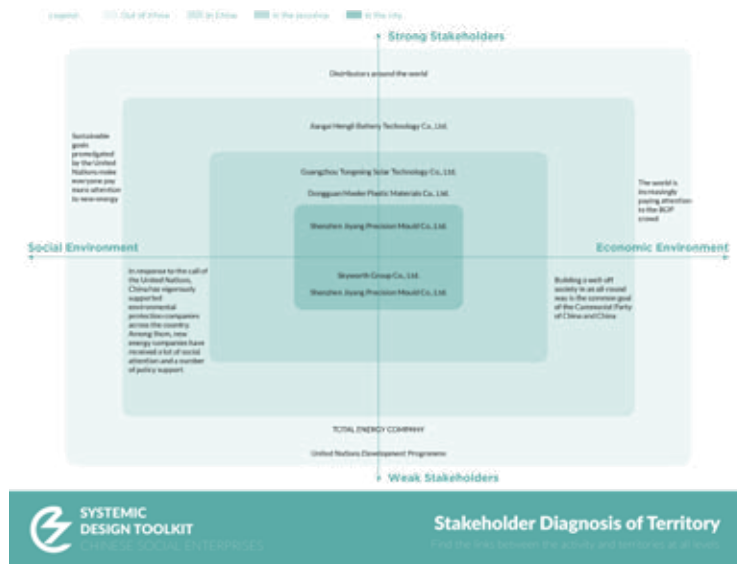
The horizontal axis of the map is used to analyze the social and economic environment of Power-Solution's solar light business in each region. From a global perspective on their social environment, Sustainable goals promulgated by the United Nations make everyone pay more attention to new energy, while from a domestic perspective, In response to the call of the United Nations, China has

vigorously supported environmental protection companies across the country. Among them, new energy companies have received a lot of social attention and a number of policy support. Their economic environment is filled in on the right, and from a global perspective, The world is increasingly paying attention to the BOP crowd. From a domestic perspective, Building a well-off society in an all-around way is the common goal of the Communist Party of China and China.

As far as canva3 is concerned, there is nothing wrong with the canvas itself, but there are some deviations in the meaning of the word stakeholders in Chinese, which causes users to only fill in some companies when filling in stakeholders while ignoring other organizations or universities.



## Canva4

In the filling of the policy, since the form was filled out by the staff of the R&D department, they only filled in some of the policies they knew and related to the R&D department. The first policy is the same as Qianlin Baby, and the tax applicable to all social enterprises in China is reduced to 15%. The second policy is Joining the Shenzhen-Hong Kong Innovation Circle, and enterprises can carry out scientific and technological cooperation with Hong Kong universities and scientific research institutions, promote the convenient flow of scientific research funds, and promote the integration of production, education, and research in the Guangdong-Hong Kong-Macao Greater Bay Area (no more than 50% of R&D investment, up to 2 million yuan). This is a policy that is still under application, and the following conditions must be met to apply for this policy:

1. It is a scientific research institution and a high-tech enterprise registered according to the law in Shenzhen with an independent legal personality.

2. A copy of the application submitted by the Hong Kong cooperation unit and the cooperation agreement (specifying the technology, manpower, equipment, capital investment, intellectual property ownership, etc.) submitted by the Hong Kong Innovation and Technology Commission must be provided.

3. The members of the project team strictly follow the academic ethics and code of conduct recognized by the scientific community, and there is no intellectual property dispute or other violations of the law.

There are also two municipal-level policies promulgated by Shenzhen, and Power-Solution has passed the application and enjoys the benefits brought by the policy.

**Canva5**
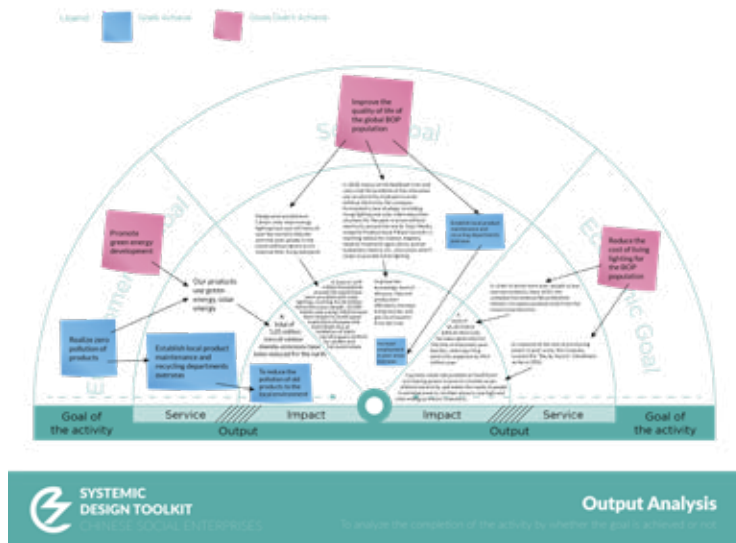


Users from Power-Solution use pink post-its to represent goals achieve and blue post-its to represent goals they didn't achieve. Among Power-Solution's environmental goals, the unrealized goal is "Realize zero pollution of products" in order to achieve this goal, they plan to establish local product maintenance and recycling departments overseas To reduce the pollution of old products to the local environment. The environmental goal that has been achieved is "promote green energy development," for which their products use green energy and solar energy. The impact is "A total of 5.05 million tons of carbon dioxide emissions have been reduced for the earth."

Power-Solution's social goal is to improve the quality of life of the global BOP population. In order to achieve this social goal, they have made a lot of efforts: They design and manufacture China's clean solar energy lighting tools and sell them all over the world to help the extreme poor people in the world without electricity to improve their living standards. The resulting impact is A total of 6.09 million households around the world have been provided with solar lighting, covering 42.64 million extremely poor people; 32,000 infants and young children have been helped to avoid upper respiratory diseases and even death due to inhalation of harmful black gases emitted by candles and kerosene lamps. In addition, In 2018, based on the feedback from end-users and the problems of low education and productivity of people in areas without electricity, the company formulated a new strategy: providing living lighting and solar video education solutions for the poor in areas

without electricity around the world: Solar Media, Integrity Promise Solar Media has built-in teaching videos for science, hygiene, medical treatment, agriculture, animal husbandry, fishery, etc., and comes with three lamps to provide home lighting. This service improves the knowledge level of the poor, improves production efficiency, increases living income, and gets rid of poverty from the root. Also includes their planned service, "Establish local product maintenance and recycling departments overseas," which will increase employment in poor areas overseas.

Power-Solution's economic goal is to "reduce the cost of living lighting for the BOP population", in order to achieve this goal, Power-Solution launched two services, one is "In order to allow more poor people to buy and use products, since 2012, the company has entered the production industry to reduce production costs from the source of production", the impact is "A total of 56.28 million kWh of electricity has been generated for the lives of extremely poor families, reducing living electricity expenses by 94.6 million yuan", another service is "In response to the lack of purchasing power in poor areas, the company created the "Pay As YouGo" installment series in 2016", It greatly solves the problem of insufficient purchasing power in poverty-stricken areas without electricity, and meets the needs of people in extremely poverty-stricken areas to use high-end solar energy products in advance. Feedback from users of Power-Solution about canvas5 is still a matter of space. The formed space for service and impact is too small for them to fill in everything completely.

## Canva6



Canva6 is an employee connector, but each employee needs to fill in a form before connecting. The users of Power-Solution are employees of the R&D department, so the six employees of the R&D department each filled out a form.

First, I will introduce R & D department Director Wang Haiqing. His functions include: Managing the R&D department, Developing product development direction, Reviewing product plans, Negotiating with partners and
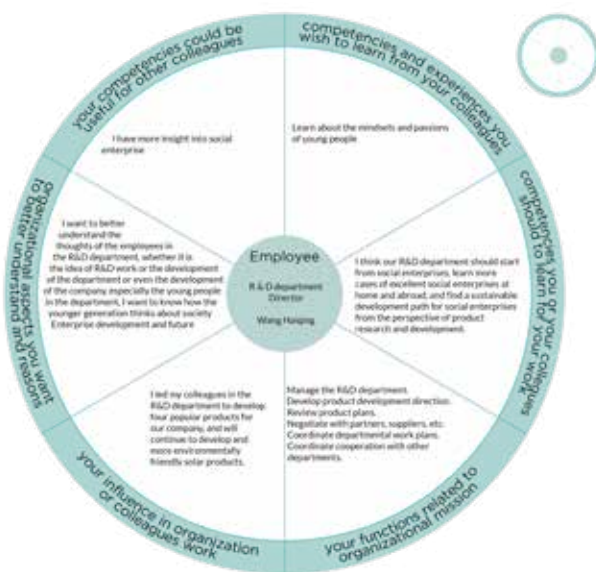
suppliers, Coordinating departmental work plans, and Coordinating cooperation with other departments. As the most senior person in the R&D department, he has more insight into social enterprise, but at the same time, he wants to learn more about the mindsets and passions of young people. He thinks their R&D department should start from social enterprises, learn more cases of excellent social enterprises at home and abroad, and find a sustainable development path for social enterprises from the perspective of product research and development.
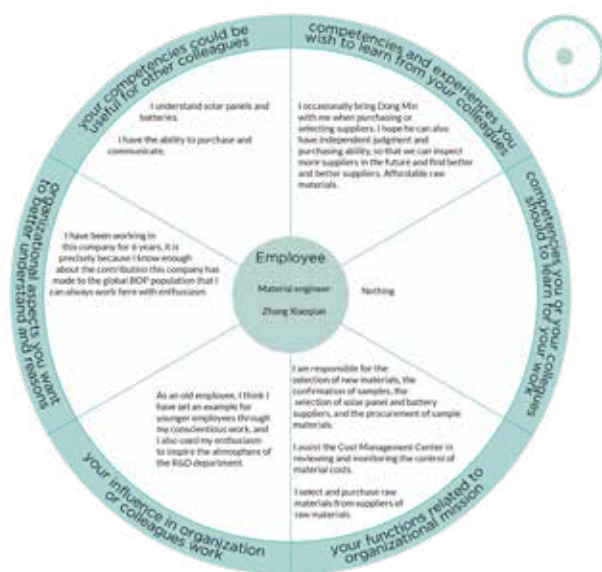


Then there is Material engineer Zhang Xiaoqian. She is responsible for the selection of new materials, the confirmation of samples, the selection of the solar panel and battery suppliers, and the procurement of sample materials. And she assists the Cost Management Center in reviewing and monitoring the control of material costs. She also selects and purchases raw materials from suppliers of raw materials. She thinks she understands solar panels and batteries, and she has the ability to purchase and communicate, which may be helpful to other colleagues. She considers herself a positive influence on the R&D department: "As an old employee, I think I have set an example for younger employees through my conscientious work, and I also used my enthusiasm to inspire the atmosphere of the R&D department."
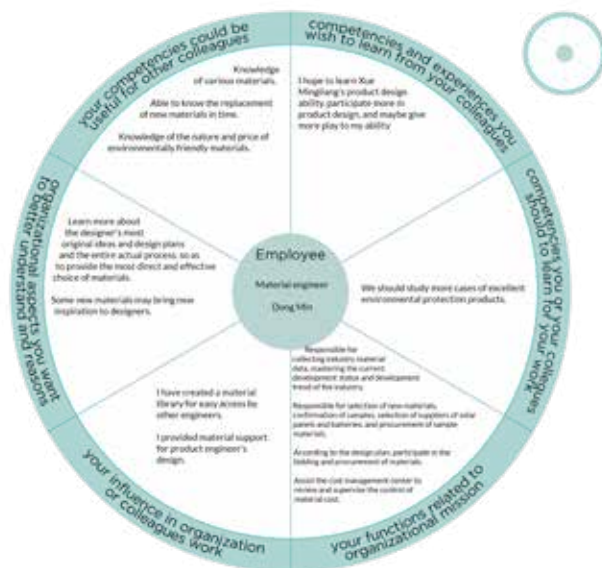
Another Material engineer named Dong Min, He responsible for collecting industry material data and mastering the current development status and

development trend of the industry. Responsible for selection of new materials, confirmation of samples, selection of suppliers of solar panels and batteries, and procurement of sample materials. According to the design plan, participate in the bidding and procurement of materials. Assist the cost management center in reviewing and supervising the control of material costs. He considers his influence on the R&D department that he has created a material library for easy access by other engineers and provided material support for product engineer's design. As one of the young employees, he wants to learn many things, such as he hopes to learn Xue Mingliang's product design ability, participate more in product design, and maybe give more play to his ability, he also thinks that colleagues in the entire R&D department should study more cases of excellent environmental protection products.
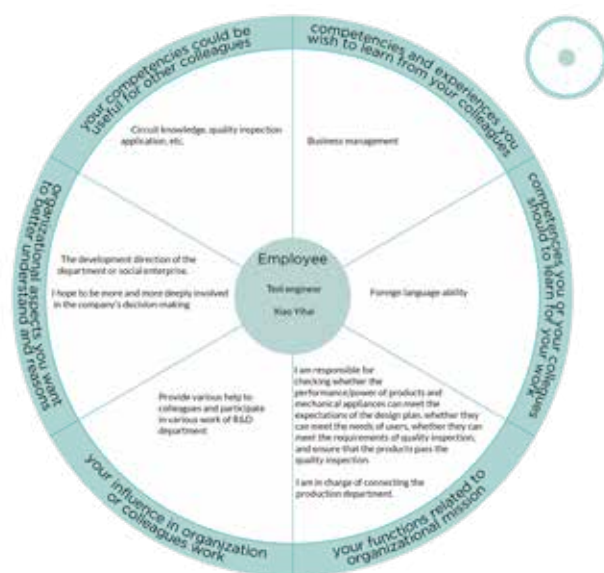


Then there is Test engineer Xiao Yihai. He is responsible for checking whether the performance/power of products and mechanical appliances can meet the expectations of the design plan, whether they can meet the needs of users, whether they can meet the requirements of quality inspection, and ensure that the products pass the quality inspection. And he is also in charge of connecting the production department. His circuit knowledge, quality inspection application, and other skills are very useful to other colleagues, and he also hopes to learn business management because he hopes to be more and more deeply involved in the company's decision-making. In addition, he believes that colleagues in the R&D department should strengthen the study of foreign language skills because most of their customers are foreign customers, and foreign language skills can not only help them investigate customer information and communicate with customers but also help them do more research on excellent foreign solar products.

Next is Product structure engineer Hao Shendong. He optimizes the product scheme according to the product specifications, functions and appearance, and customer
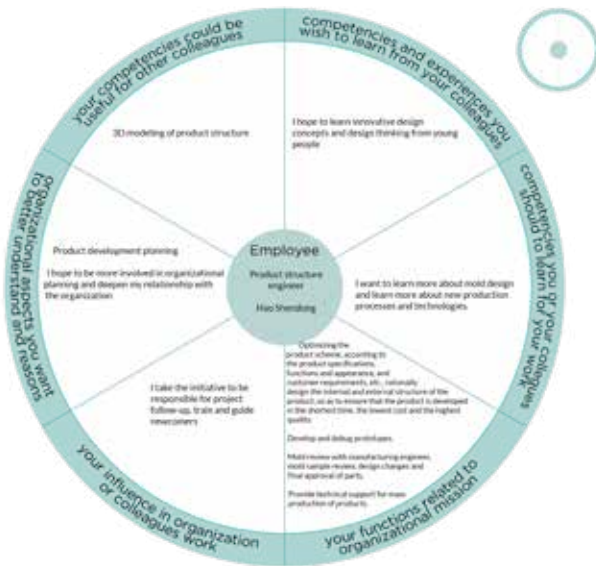
requirements, etc., rationally designing the internal and external structure of the product, so as to ensure that the product is developed in the shortest time, at the lowest cost, and the highest quality. And he develops and debugs prototypes, mold reviews with manufacturing engineers, mold sample reviews, design changes, and final approval of parts. And he also provides technical support for the mass production of products. He takes the initiative to be responsible for project follow-up and train and guide newcomers. He thinks his 3D modeling ability is useful to others, and he also hopes to learn innovative design concepts and design thinking from young people.
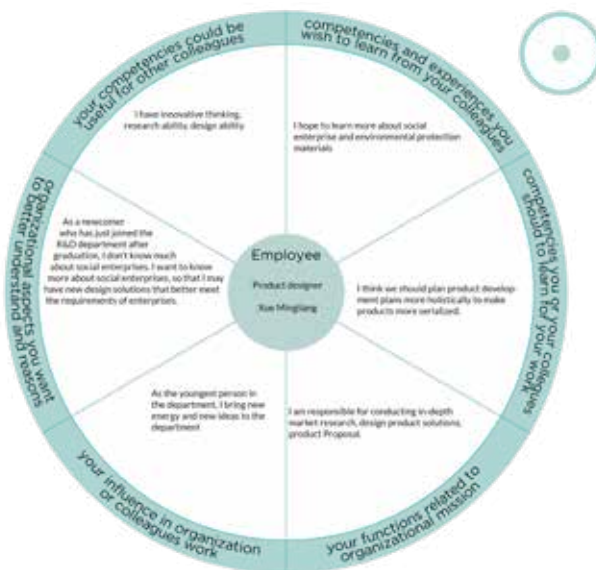
Finally, Product designer Xue Mingliang is responsible for conducting in-depth market research, designing product solutions, and producing Proposals. Although he is the youngest member of the R&D department, he also has innovative thinking, research ability, and design ability worth learning from other colleagues. And there are many places he wants to learn, such as he hopes to learn more about social enterprises and environmental protection materials. He said, "As a newcomer who has just joined the R&D department after graduation, I don't know much about social enterprises. I want to learn more about

social enterprises so that I may have new design solutions that better meet the requirements of enterprises." At the same time, he thinks their R&D department should plan product development plans more holistically to make products more serialized.
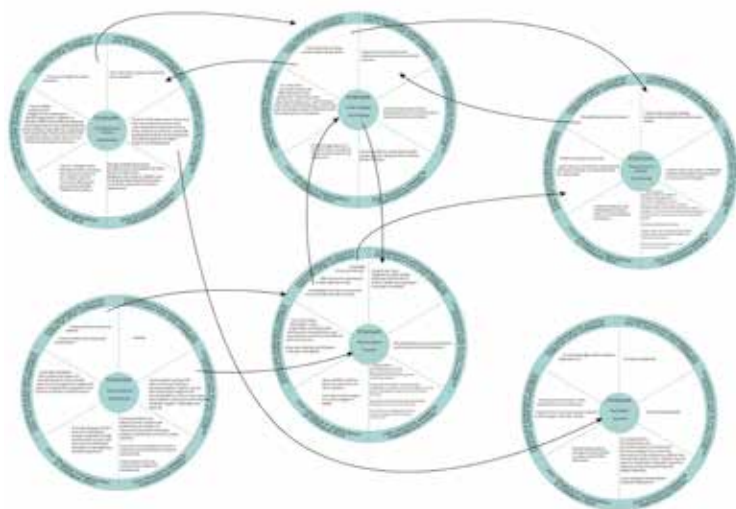


After completing the individual employee forms, they need to put all the forms together to find the connections among them. They use arrowed lines to indicate whether the competencies are teaching or learning. R & D department Director Wang Haiqing can pass on knowledge related to social enterprise to Product designer Xue Mingliang, and learn innovative design ideas from Xue Mingliang, who can also teach Business management-related experience is given to Test engineer Xiao Yihai. Product designer Xue Mingliang, he and product structure engineer Hao Shendong have a relationship of mutual learning and exchange, and at the same time, he has a relationship with Material engineer Dong Min in the exchange of environmental protection materials and product design. Material engineer Dong Min can impart some material knowledge to Product structure engineer Hao Shendong, but he also needs to learn more business knowledge in this position from another Material engineer Zhang Xiaoqian.

After the connection, we obviously found that relatively young employees need to learn a lot of knowledge and experience from more experienced employees. With this understanding, they will express the exchange and transfer of these experiences and knowledge in a more clear and more detailed manner in Canva7.

## Canva7

In Canva6, users from Power-Solution first filled in the relevant information about the distribution of human resources. In Human resources applied by social enterprises to activities, they fill in six employees of the R&D department, and in the two parts that do not overlap, in Human resources that social enterprises lack fill in Mold designer. The other is Human Resource inside the Social Enterprise but not used in the activity Filled in Other department staff. The content of the training
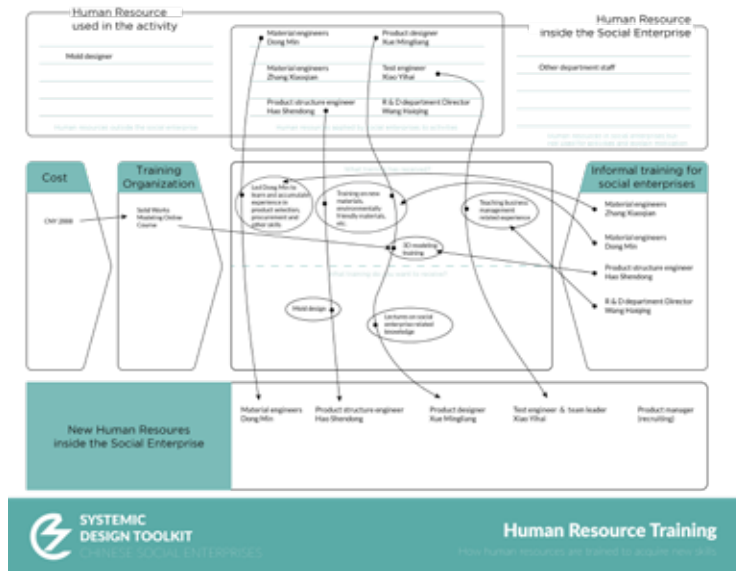
is mainly for four employees in the R&D department. The first one is Material engineer Dong Min, who is trained by another Material engineer Zhang Xiaoqian from the same department. She Led Dong Min to learn and accumulate experience in product selection, procurement, and other skills. Material engineer Dong Min will also train Product structure engineer Hao Shendong and Product designer Xue Mingliang on new materials, environmentally friendly materials, etc, while receiving the training of his predecessors.

Product structure engineer Hao Shendong hopes to improve himself more, and he also hopes to learn the ability of mold design, but so far, he has not found a suitable training method. On the contrary, Product designer Xue Mingliang has found a suitable online course to learn 3D modeling, and at the same time, Product structure engineer Hao Shendong will also give him some help in 3D modeling. In addition to the above training, Product designer Xue Mingliang also wants to participate in some Lectures on social enterprise related knowledge, but at present, due to the covid-19, many activities have been suspended, so this item is listed as the training he wants to receive.

The last person to be trained was Test engineer Xiao Yihai, who received training on business management-related experience directly from R & D department Director Wang Haiqing. After receiving such training, he will become the team leader of the R&D department so as to manage the R&D work of the entire R&D department more effectively when R & D department Director Wang Haiqing is busy.

In addition to the training of the existing human resources, the R&D department also plans to recruit new human resources. In canva2, they mentioned that one of the problems of the R&D department is that there is no special person to do research work, and their customers are all over the world. The workload that led to their preliminary research was huge, so they decided to recruit a new product manager to complete the preliminary part of the research and development work. And at the same time, they could also assist R & D department Director Wang Haiqing in

coordinating the entire product. Development plans so that their products can be serialized for easy product update iterations.

In this canvas, employees from Power-Solution R&D did not have any training before using the toolkit, but in the process of completing the first few canvases, they found that, in fact, their colleagues in R&D had a lot of ideas for self-improvement, so they listed these ideas in the canva7, although this is not the "What training has received?" described in the table, but "What training do you plan to receive?" But this is a very Meaningful breaking of the frame. And the original "What training do you want to receive?" in the second half was changed to "What training do you want to receive but can't achieve for now?" This also provided some inspiration for my toolkit improvement.

## Canva8
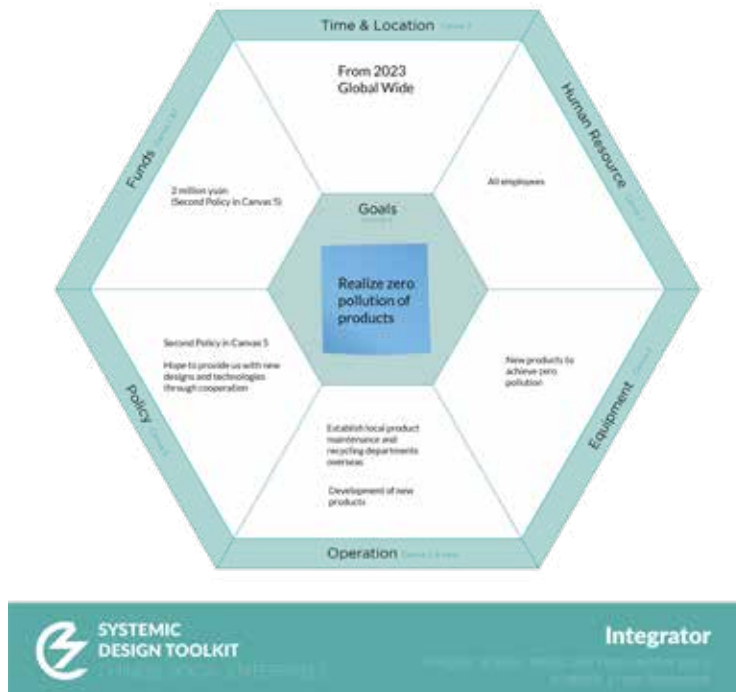


Users from Power-Solution integrated the results of the previous seven canvases in canva8. The first in the center is the unrealized goal of "Realize zero pollution of products" in canva4, which makes the R&D department begin to develop new products, and the new products will be released in 2023. The scope is still global. Human resources are the new human resources in canva7, namely the trained Material engineer Dong Min, Product structure engineer Hao Shendong, Product designer Xue Mingliang, Test engineer & team leader Xiao Yihai and Product manager(recruiting). The equipment is Solar reading light, Solar lantern, Solar Home Lighting System, Multifunctional Solar Home System, and new products to achieve zero pollution in canva2. To achieve this goal, they will establish local product maintenance and recycling overseas departments and development of new products. The policy their operations can rely on is the second policy in Canvas 5 to join the Shenzhen-Hong Kong Innovation Circle. They hope this policy to provide them with new designs and technologies through cooperation and also the funds.

## Canva9
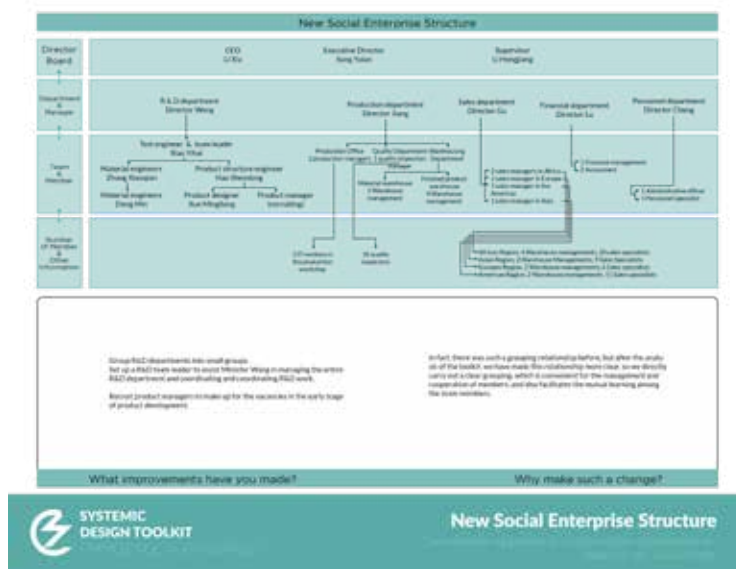
The last canvas is to draw a new social enterprise structure diagram. As a result, with the use of the previous 8 canvases, the R&D department of Power-Solution has undergone some structural changes. Firstly, Xiao Yihai, a test engineer, was promoted to the team leader of the R&D department, and his responsibilities are to coordinate the R&D work of the R&D department and assist R & D department Director Wang Haiqing in managing the R&D department. According to the mutual training and learning connection of the employees in canva6 and canva7, other R&D employees are divided into two groups, one group is two material engineers, and Material engineer Zhang Xiaoqian is responsible for training and leading another Material engineer Dong Min, the other group is led by Product structure engineer Hao Shendong to help lead the youngest employee Product designer Xue Mingliang and the pro-employees who are about to join the social enterprise.

As to why there is such a structural change, their explanation is: "In fact, there was such a grouping relationship before, but after the analysis of the toolkit, we have made this relationship more clear, so we directly carry out a clear grouping, which is convenient for the management and cooperation of members, and also facilitates the mutual learning among the team members."

# 5.5.3 EVALUATION FROM POWER SOLUTION



Evaluation of Chinese Social Enterprise Systemic Design Toolkit

| | Usability | Purposiveness | Applicability | Enlightenment | Overall Evaluation | Usage |
|---|---|---|---|---|---|---|
| | Do you think it is simple to use it? no ● → ● yes | Do you think it achieves the purpose of the designer? no ● → ● yes | Does this apply to your social enterprise? no ● → ● yes | Does it inspire you more about social enterprise? no ● → ● yes | What do you think of it as a whole? bad ● → ● | How many people were used and how long time did you take to complete the toolkit? |
| CANVA 1 | ●●●●● | ●●●●● | ●●●●● | ●●●○○ | ●●●●● | 2 People 15 min |
| CANVA 2 | ●●●●● | ●●●●● | ●●●●● | ●●●●● | ●●●●● | 2 People 10 min |
| CANVA 3 | ●●●○○ | ●●●●○ | ●●●●● | ●●●●○ | ●●●●○ | 3 People 10 min |
| CANVA 4 | ●●●●● | ●●●●● | ●●●○○ | ●●●○○ | ●●●●○ | 2 People 10 min |
| CANVA 5 | ●●●●○ | ●●●●● | ●●●●● | ●●●●● | ●●●●● | 2 People 15 min |
| CANVA 6 | ●●●●● | ●●●●● | ●●●●● | ●●●●● | ●●●●● | 6 People 30 min |
| CANVA 7 | ●●●○○ | ●●●●● | ●●●●● | ●●●●● | ●●●●○ | 6 People 20 min |
| CANVA 8 | ●●●●● | ●●●●● | ●●●●● | ●●●●● | ●●●●● | 3 People 10 min |
| CANVA 9 | ●●●●● | ●●●●○ | ●●●●● | ●●●●● | ●●●●● | 4 People 15 min |
| TOOLKIT | ●●●●○ | ●●●●● | ●●●●● | ●●●●● | ●●●●● | 7 People 2 hour |

Maybe you have other suggestions, please tell me here

First of all, we are very happy to have young people study in the topic of social enterprise and choose our company. It was the first time for us to come into contact with the toolkit, but the process of using it was very smooth and very interesting. Most people in our department participated in this activity, which not only deepened our understanding of the company, but also deepened the relationship between colleagues in the R&D department. We originally encountered some bottlenecks in research and development. Through the use of the toolkit, we have a clearer understanding of our own problems and have some ideas to solve them. The only downside we felt was that it took a little longer to use the toolkit, and while it makes sense to spend that time in my opinion, the boss probably would have preferred us to spend our time at work. Overall, it was a fun experience, and good luck with your project!
-- Xue Mingliang

Users from Power-Solution have a high evaluation of this version of the canvas, they think this toolkit is very inspiring to them, and each canvas can express the designer's purpose, and the order of the canvas is also logical, so users can easily complete the entire canvas by following the guidance of the canvas, and they can gain some gains during the use of the canvas, and these gains can also be directly applied to the subsequent canvas, which they feel very good. But in terms of usage, there is still too little space on the canvas to write everything down. They also wrote down their approximate time and the number of participants in the improved evaluation form. The longest use time was in Canva6, which took about 30 minutes because this canvas requires members to integrate after filling in their personal information. It is also time-consuming to find out the connection. The shortest canvases are canva2, canva3, canva4, and canva8, all of which take 10 minutes. The total time spent on 9 canvases is 2 hours, with an average of about 13 minutes per canvas. As far as Power-Solution is concerned, a total of 7 employees participated in using this toolkit, including 6 employees from the R&D department and an employee from the personnel department who participated in the filling in canva2. The usage time of 2 hours above the usage time is a bit long for the employees of Power-Solution.

# 5.6 THE FINAL CANVAS

Based on feedback from Power-Solution users using the second version of the toolkit, I made the final touches and got the final canvas.

The final version of the canvas has only a few small improvements based on the second version. The first improvement is in canvas1. I increased the proportion of the social enterprise structure diagram in canvas1. This is based on the user filling in the social enterprise structure. When the space is not enough in the picture, the post-it is used to increase the space. On the other hand, this adjustment can also highlight the main purpose of this toolkit to improve the structure of social enterprises.

The second improvement is in canvas 5, which is also due to the fact that the user has insufficient space in some places and extra space in some places. According to the user's usage, I moved the goal content to the innermost circle of the form in the semicircle, filling in the goals, services, and impacts in order from the inside to the outside. Such changes make the goal with the least content to be filled in the smallest form, and the form that may have more words in the outermost circle will have more space for users to fill out.

The third change is on the last canvas. This is for the same reasons and changes as the first one. I also increased the proportion of the new social enterprise structure table in the canvas.

In addition, I also provide a recommended print size for each form to prevent different users from printing canvases of different sizes and have a bad sense of use. Canva1, canvas5, canvas7, and canvas9 are recommended to be printed in A3 size, while canva2, canvas3, canvas4, canvas6, and canvas8 are recommended to be printed in A4 size.

## Canva 1



Holistic Diagnosis of Social Enterprise

## Canva 2



Holistic Diagnosis of Activity

## Canva 3



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**Stakeholder Diagnosis of Territory**

## Canva 4



SYSTEMIC DESIGN TOOLKIT

**Policy**

## Canva 5



SYSTEMIC DESIGN TOOLKIT

**Output Analysis**

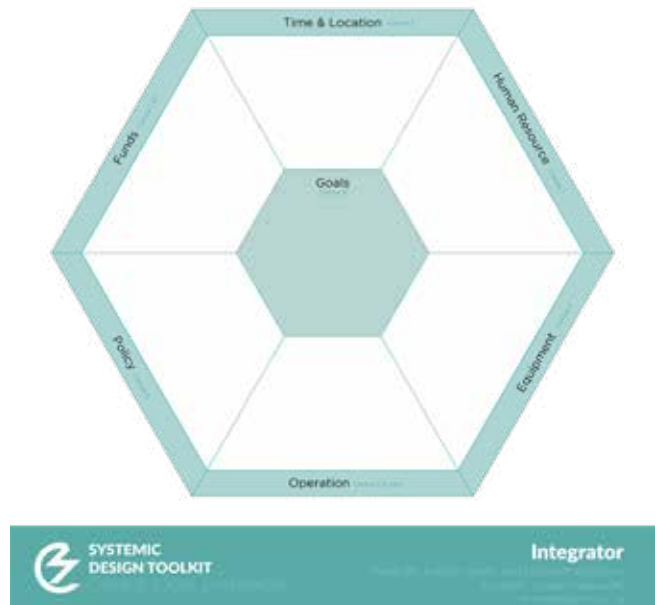## Canva 6



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**Employee Connector**

## Canva 7



Human Resource
used in the activity

Human Resource
inside the Social Enterprise

Cost

Training
Organization

Informal training for
social enterprises

New Human Resoure
inside the Social Enterprise

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**Human Resource Training**

## Canva 8



Time & Location

Funds

Human Resource

Goals

Policy

Equipment

Operation

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**Integrator**

## Canva 9



New Social Enterprise Structure

Director
Board

Department
&
Manager

Team
&
Member

Number
of Member
&
Other
Information

What improvements have you made?

Why make such a change?

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**New Social Enterprise Structure**

# 06

# CONCLUSION AND FUTURE RESEARCH

# CONCLUSION AND FUTURE RESEARCH

The thesis was proposed to me in August 2021, but the actual work started in September. It was a very difficult time in the beginning because of the lack of public information on Chinese social enterprises. Fortunately, some useful and reliable information can still be found on local government websites and some media reports. Based on the research on Chinese social enterprises and design toolkits, I have used the methodology of systemic design to start making the guideline for design toolkits since December. After constant revision and experimentation, the first version of the Chinese social enterprise systemic design toolkit was born in March 2022, and then I tried to contact Chinese social enterprises to invite them to try the design toolkit I designed. While sending emails to many Chinese social enterprises, I also tried to return to China to have face-to-face communication with them. Unfortunately, this plan failed to materialize, but luckily I contacted several Chinese social enterprises and had online meetings to communicate with them. Then, according to the trial feedback from Chinese social enterprises, the systemic design toolkit was continuously modified and tried out. During this period, the writing of the thesis was also in progress.

After I return to China, I hope to make up for the regret of not having face-to-face communication with Chinese social enterprises and try out the design toolkit with them. I hope to communicate with Chinese social enterprises as much as possible to let more Chinese social enterprises contact or even try this design toolkit. I believe that the real practitioners working in Chinese social enterprises will use their work experience and a deeper understanding of social enterprises to make this The project has further development. Maybe they will also give their own social enterprise reality to create new content based on the design toolkit I made, which is what I'm looking forward to seeing.

# ACKNOWLEDGMENTS

# 07

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