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# SIMULATION GAME #1 SUSTAINABILITY

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## 1. Introduction

### 1.1. Structure of this manual

The manual consists of three parts:

1. In the first part "**Background information**" you will find general information on what simulation games are and where they are used.
2. In the second part "**Didactics**" you will find information on how to use simulation games in your courses, including preparation, learning outcomes and necessary resources.
3. In the third part, "**Simulation Game - Sustainability**", you will find the simulation game as well as all the materials for conducting the game in your courses.

The simulation game is structured into:

- story - short overview of the game
- game procedure - a step to step guide in temporal sequence
- game schedule - table of phases and their duration
- game material - for print out divided into
  - procedure poster
  - business case
  - role cards
  - task cards
  - event cards
  - group division notes
- follow up - ideas for repetition of content
- checklist - compact overview what to consider
- lessons learned - practical insights from the pilot phase

### 1.2. How to use this guide

If you are familiar with facilitating simulation games you can skip the first part, which gives a general introduction to this teaching methodology.

Read the whole simulation game instruction to understand the meaning.

Print out the game material. Use the game procedure as an in-depth instruction and the game schedule as an overview during the simulation for a quick reference.

### 1.3. Project eco<sup>3</sup>

eco<sup>3</sup> is an international research project dealing with Sustainability Management and Green Controlling in the Social Economy. An international partnership consisting of four universities and two companies from Austria, the Czech Republic, Germany and Romania worked in this Erasmus+ funded project on the development of teaching material for the qualification of future managers in the Social Economy on the topic of sustainability: a white paper, four courses, pocket lectures, and the simulation games in hand.

The funding by Erasmus+ allowed us to form a multi-professional cooperation between researchers and practitioners within the framework of a strategic partnership which enables us to develop practical content based on the latest research. All the results are available open access on the project website: <https://eco3project.org/>

## 2. Background Information<sup>1</sup>

### 2.1. What is a simulation game?

Simulation games can be used to simulate a wide variety of areas of life. Through the application of business game methods, the participants can experience in practice which factors and dynamics take effect in life worlds relevant to them. On the one hand, this develops the ability to deal adequately with complex systems and to plan sensible strategies for action. On the other hand, the team competence of those involved is expanded, as the development of more efficient communication and organisational structures can be tested through their own actions in a largely fear-free climate.

### 2.2. Characteristics

- Simulated environment (e.g. social organisations)
- Given social roles (e.g. in private life: Father, mother, friend, club member, spouse; in professional life: Works council member, colleague, manager, consultant)
- Given rules (e.g. “stay in your role”)

### 2.3. Phases of the game (theory)

#### **Phase 1: Communicating the initial situation.**

- Short summary of the background of the game and the initial situation. Students learn more about the simulated environment and story.
- Roles: For the game, the students slip into different roles. They receive information about their role and their interests and goals.
- Present problem that needs to be solved. In every game there is a problem that has to be solved. These are often conflicts or problems where there are very divergent opinions. Examples for simulation games:
  - Experience parliamentary democracy: how are decisions made?
  - Choice of study: discover interesting study professions and to compare their characteristics with the ideas and inclinations of the students.
  - Negotiation in the international economy: how can each country achieve the highest possible profit with its products.
  - Establishment of a company: business development from the idea to a successful business.

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<sup>1</sup> (refer to e.g. Meßner et al., 2018; Duke, 1980; Forberg, 2020; Blaschek & Spanlang, 2017; Dietrich, 2020)

- Simulation game stock exchange: manage a securities account with a fictitious starting capital.

## Phase 2: Familiarisation with the roles

- Detailed information in business cases: In the subsequent **information phase**, the students read the problem outline for initial orientation, find out about the conflict and the background to the conflict as well as the objective of the simulation game. After that, game groups are formed. This should not be done completely randomly. On the one hand, it makes sense to form groups that are mixed in terms of interest; on the other hand, there are "key groups" in every simulation game on which the success of the simulation depends to a large extent, e.g., management, moderator, meeting leader, chairman. If lecturers do not want to take on such roles themselves (which is always only the second best solution), they must entrust them to particularly competent students.

In the **elaboration phase**, group members familiarise themselves with the group-specific and role-specific information. They clarify any comprehension questions that arise in the group or by asking the lecturer, use additional sources of information provided (lexicons, manuals, etc.), and visualise the concrete course of the simulation once again.

- „Protagonisation“: From what perspective should I adopt the role? Is it „me“, with my current values, just in a different position? Is it a stereotypical caricature of the position played? Is it a construction of a different, hypothetical person with his/her own goals and values?
- Fictional space: Are students allowed to carry real-life relationships and arguments into the game? Do they have the power to „define reality“, e.g. to come up with additional details about their role, company or clients not on the role cards – or should they always ask the moderator? Or are the fictional parameters of the game fixed?

## Phase 3: Playing the Game

- Opinion and will formation: The group members discuss their role situation, their goals, their interests against the background of the information they have already acquired. In this sequence of the business game, passive knowledge should become active, manageable and applicable knowledge. The group sets its goals, ranks them, plans strategies for achieving the goals, and determines possibilities and limits of compro-



mises. The results should be briefly recorded in writing. In addition, it is useful to document the course of the group discussion in a protocol (a recording is also possible). Difficulties, breaks, ambiguities can thus be reconstructed better later.

- Interaction: Even with a division of labour, the interactions cannot always proceed in parallel, but often only in a temporal succession. These encompass:
  - Establishing connections with the other game groups
  - Negotiating with them
  - Searching for alliance partners
  - Feeding back to one's own group
  - Reviewing
  - Modifying the group's strategy in light of the negotiations

At the end of the interaction phase, there is the final clarification of the group position and the definition of the strategy for the subsequent application phase.

- Conference: In this phase, the positions, arguments, proposals for solutions are presented by the group spokespersons named by the groups in each case. In the application phase, which often takes the form of a conference (conference phase), the compromise is to be sought or the decision is to be made.

The remaining group members who do not play along are given observation tasks. They can either observe their own group representative (How did he/she represent our position, did he/she stick to the agreed strategy?) or the representative of another group (Was the position clear? Did he/she represent it convincingly? What strategy was recognisable?).

#### **Phase 4: Evaluation/ Debriefing**

- Evaluation for students
  - Reflection on learnings and experiences
  - „Deprotagonisation“, i.e. stepping outside of the role played
  - Discussion of transferability
- Evaluation of the game
  - Questionnaire



## 3. Didactics

### 3.1. Games

We developed two separate games:

- Simulation Game #1 „Sustainability“
- Simulation Game #2 „Green Monopoly“

The two games could be played on their own (e.g. during or after lecture) or linked together.

### 3.2. Before the game

The students should have attended:

- for Simulation Game **#1 Sustainability** the courses and the knowledge previously acquired there:
  - Sustainability & Sustainability Management (132 units)

#### **What should the students learn before from the lectures?**

- Social organisations could have a blind spot in sustainability - students should realise that.
- Sustainability is influenced by our lifestyle and our economic system.
- Which factors have the greatest influence on the topic of sustainability (e.g. electricity, travel, waste avoidance)?
  - knock-on/second-order effects such as influence on consumption patterns by staff or clients/customers, redistribution of income across the society, community development...?
- What measures have the biggest influence / the fastest results?

### 3.3. Learning outcomes

#### Content

- Experience how to meet the obstacles when directing a company towards sustainability.
- Experience how to work together to find solutions for a social enterprise even if conflicting interests exist.
- There is not the „one correct“ approach to sustainability management.
- Not only the indicators are important, but also the individual position (how I frame my own autonomy, moral responsibility and power). Can sustainability be implemented in my company if I am not convinced of it myself?
- Dealing with uncertainty: "there is no right solution".
- Active cooperation required.
- Overcoming resistance.
- Making decisions based on arguments, developments and data.

#### Individual Skills

- Recognising one's own interests.
- Recognition of conflicting interests.
- Situation analysis.
- Defining problems.
- Formulating own goals.
- Target-performance analysis.
- Making decisions about which objectives are realisable.
- Insights into political contexts.
- Insight into the course of political decision-making processes.
- Making decisions oneself.
- Bearing the consequences of decisions made by oneself.

#### Social skills<sup>2</sup>

- Ability to deal with conflict situations.
- Practicing frustration tolerance.
- Ability to absorb and evaluate information.
- Development of problem-solving skills.
- Development of solidarity behaviour.
- Development of cooperation and negotiation skills.
- Development of social sensitivity and communication skills.
- Development of decision-making and action skills.

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<sup>2</sup> <https://www.lpb-bw.de/planspiele-didaktik#c16502>

- Development of the ability and willingness to think in alternatives.
- Development of the ability and willingness to develop one's own initiative and to look for ways to realise them.
- Development of the ability and willingness to work in different social groups.

## 4. Frame

### 4.1. Timeframe

| Topic                    | Units    |
|--------------------------|----------|
| Preparation in class     | 4 units  |
| Preparation (self-study) | 38 units |
| Simulation game in class | 12 units |
| Evaluation               | 6 units  |
| Feedback (self-study)    | 22 units |
| In sum                   | 82 units |

We recommend conducting the game as a block seminar over 2-3 days.

### 4.2. Group size

We recommend running the game in courses of 12 people or more, so that each role is filled by at least two people. If there are fewer students, the number of roles should be reduced.

A maximum of 60 people can take part in the game.

### 4.3. Group division

To get a good distribution of students into each group, there are different methodologies: Let them choose on their own, division by the Game Leader or random.

We advise using a lottery, where each student picks a slip of paper with a group name ⇒ [group division notes](#).

### 4.4. Tips and Tricks

#### Atmosphere

Simulation games live from the atmosphere in the room. Matching utensils make it work: eg. a speaker's desk. Name tags simplify the recognition of the groups.

### **Dresscode**

To enhance role identification formal attire for the simulation day might be helpful. Consider, according to your estimation, whether the request for a “business outfit” is a surplus or is excluding poor students in your case.

### **Interior design**

The rooms should be equipped in such a way that students can interact with each other. For this purpose, the rooms should be large enough. The tables are best placed in a circle or in a U-shape.

### **Role assignment**

If you know the students better, you can assign the roles (big influence toward the outcome: Initial Group) with motivated and committed persons, else draw them by lot.

### **Start of the simulation game**

To symbolise the start, a good move is to leave the room. After a short greeting, enter the room together.

### **Language rules**

Basically, pay attention that the students address each other formally over and over again. This helps to maintain the character of the simulation game.

### **Language hurdles**

Consider if the game is done in English that students need even more motivation to speak up. Encourage them to give it a try and do not correct grammar mistakes to avoid further discouragement. Take also into consideration that preparation might take longer in a foreign language.

### **Group dynamics**

As you are acquainted with your students after the courses, you might take into consideration how the debate culture is. Are the students open for discussion or are they mostly silent? Do they need encouragement to present something in front of the group? You might want to stress in the onboarding phase that there are no “wrong answers”.

If you know that there might be only one-sentence answers and a tendency to quick chances of mind “to get over with” - you will especially have a close look at questions provided at the role cards of the Moderator.

## 5. Requirements

### Requirements for lecturers

- Consistent, well-founded and rhetorical refusal (students will come and ask: what should I do? what is right?)
- Frustration management: not all students can be picked up with this method.
- Flexibility and talent for improvisation: not all situations can be foreseen with role and event cards.
- Watch this video to learn about the simulation game:
  - eco<sup>3</sup> Simulation Game I – Sustainability:  
Link: <https://vimeo.com/842757677/c202b7f92f>

## 6. Simulation Game #1 “Sustainability”

### 6.1. Story: On the road to sustainability

- Employees of the social organisation "HEART" have the idea to make the organisation more sustainable.
- They talk to their boss about it.
- She suggests discussing the idea with all stakeholders at a General Assembly meeting.
- The game will take place on the day of the General Assembly. The students slip into different roles such as:
  - Management
  - Initial Group
  - Workers' Council
  - Board of Directors
  - Board of Clients
  - Members & Donors
- The aim of the game is to discuss with each other in a first phase and finally to make a decision, i.e. to vote on whether the organisation HEART will orient itself sustainably in the future.
- In a second phase of the game, measures are developed to promote sustainability at HEART. In this phase of the game, a vote is also held to determine which measures have the strongest influence or are easiest to implement<sup>3</sup>.

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<sup>3</sup> If sustainability is decided against in the first phase of the game, the framework is created on the basis of an event card (legal change that requires sustainability) so that the second phase of the game can still be carried out.

## 6.2. Game procedure

The design of the game is based on the four phases of business games. The phases are embedded in the story of the General Assembly of HEART.

| Phases of games (theory)    | Simulation Game “Sustainability”      |
|-----------------------------|---------------------------------------|
| Communicating initial story | Preparation<br>Onboarding             |
| Familiarisation with role   | Onboarding                            |
| Playing                     | General Assembly (group and meetings) |
| Debriefing                  | Evaluation                            |

In the course of the game, pure group role times alternate with "official meetings" within the framework of the general meeting. The group phases usually serve to prepare for the phases of the general meeting and to exchange information about the understanding of the role and the business case at the beginning. In the group phases informal exchange between the groups should also be encouraged - in the “canteen” or that delegates from one group meet up with another group in their rooms. At that time the others can be convinced of one's own position with arguments, alliances can be forged, offsetting trading can be agreed on. It is up to the students to make these agreements transparent at the general assemblies, at the debriefing they should be uncovered, so the dynamic and outcome becomes comprehensible for all.

The general meeting consists of three phases:

- A familiarisation phase in which all the groups introduce themselves and their position.
- The second phase in which the groups present their position on sustainability, discuss it with each other and finally vote on it.
- The third phase in which - after they have decided in favour of sustainability (or are forced to do so if they say "no" in phase 2) - they consider measures and prioritise them together.

*There is a preparation phase before the simulation game, which is divided into periods of preparation in class and mainly as self-study, an Evaluation/Debriefing (chapter 6.2.3) and a feedback part after the simulation game. It is advisable to carry out a final feedback self-study*



phase. Students can write a summary of what they have experienced and learned during the simulation game. More about the division in chapter 4.1 – Timeframe.

The following pages are filled with a detailed overview of the different phases of the simulation game. The task cards, event cards and role cards for the Game Leader and Moderator can be found in the chapter ⇒ [Game material](#) later in this manual.

The Game Leader is the person who facilitates the content of the simulation game, the Moderator is the person who hosts and moderates the General Assembly and facilitates the discussion and decision process. It could be doable to take both roles at the same time, splitting them however has clear advantages.

### 6.2.1. Preparation

| Units                          | Phase                | Idea of Phase   | Task Card | Event Card | Game Leader                                    | Moderator |
|--------------------------------|----------------------|---|-----------|------------|--|-----------|
| <b>Preparation before game</b> |                      |   |           |            |  |           |
| 4                              | Preparation in class | The students are prepared for the business game. They are informed about the scope and the rough procedure. They receive information on what they need to prepare and bring with them. The groups are formed, the role cards and the business case were distributed (1 day before the game starts). | -         | -          | Gives the necessary information and motivates. | -         |

One day before the game will taking place, the Game Leader randomly assigns the participating students to the roles. After the groups are built, the Game Leader sends the Role Cards and the business case to the students. Please point out to the students that information asymmetry is built up by the role cards and that the students should not exchange information about them.

Before the game, the students are informed about the objective of the game and the rough course of events. They are informed how the academic performance will be assessed.

## 6.2.2. Simulation Game

### 6.2.2.1. Onboarding

| Unit | Phase      | Idea of Phase                        | Task Card                        | Event Card | Game Leader  | Moderator |
|------|------------|--------------------------------------|----------------------------------|------------|--|-----------|
| 1    | Onboarding | Familiarisation with roles and group | ⇒ <a href="#">“As-signments”</a> | -          | Welcome!<br>Hand out Task Card ⇒ <a href="#">“Assignments”</a> .<br>Give time for questions. | -         |

There are two ways of familiarisation the students with the role card and the business case. To play the game in an optimal way, please select the first way.

1. One day before the game will taking place, the Game Leader randomly assigns the participating students to the roles. After the groups are built, the Game Leader sends the Role cards and the business case to the students. Please point out to the students that information asymmetry is built up by the role cards and that the students should not exchange information about them.
2. The groups for the individual roles are formed. The students can either form them themselves or the groups are drawn. ⇒ [group division notes](#). He/she then distributes the material to the students.
  - ⇒ [Business case](#)
  - ⇒ [Role cards](#)
  - ⇒ Task Card [“Assignments”](#)

At the beginning of the day, the Game Leader welcomes the players. At the start beginning, the schedule of the day is discussed again and there is time for questions. The groups are asked to get together and put on their name badges (table sign and/or name badge). When the students are in the groups, the Game Leader distributes the Task Card ⇒ [“Assignments”](#) and the guiding questions for the “Welcome” to the students.

After the handover, the game is officially opened. The groups have time to complete the task "Assignments", i.e. preparation for the first meeting of the General Assembly.

If there is no extra facilitator, the Game Leader changes roles to Moderator.

### 6.2.2.2. General Assembly A: Welcome (1st round)

| Unit | Phase                       | Idea of Phase   | Task Card | Event Card | Game Leader     | Moderator   |
|------|-----------------------------|---|-----------|------------|-----------------|---|
| 1    | General Assembly A: Welcome | <p>Introduction of every group and their general positions and expectations.</p> <p>Every group gives a short (maximum 5 minutes) self-presentation.</p> <p>Tell the others who you are, what your general role in the organisations is, what are your expectations on decision, report on what you value about the organisation and what social aspects are important to you.</p> <p>What's your slogan?</p> | -         | -          | Time management | <p>Opens the event.</p> <p>Short overview over structure and goals of GA as external Moderator.</p> <p>Hands over to "Initial Group", to the "Management group" and then to every group for their presentation.</p> <p>Make sure that students do not yet name any measures.</p> <p>Closes the event.</p> |

The Moderator opens the general meeting of HEART and welcomes the members and guests. As Moderator, he/she has been asked to moderate the general meeting because the question of whether HEART will be more sustainable in the future is to be decided today. The idea came from the Initial Group, which approached the management with the idea. As this is a major, far-reaching decision, it was decided to discuss it with all those involved at the general meeting. As not everyone knows each other well, he/she asks all groups to introduce themselves briefly and to give an initial assessment of how they stand on sustainability. In this phase, only points of view and arguments are described, measures are not yet to be named. The groups should also report on what they value about the organisation and which social aspects are particularly close to their hearts. The Moderator gives the floor to the Initial Group first, then to the management, and finally all other groups present. You can give a bit more

time for the Initial Group that they can address their request. At the end, he/she gives a short summary and suggests discussing the question in a second round. The groups can use the time to prepare their point of view and for door-and-antler discussions.

The facilitator or Moderator keeps track of the time.

### 6.2.2.3. Preparation Presentation for Assembly

Before everyone leaves the room the Moderator hands out the Task Card ⇒ [“Preparation for General Assembly B: Decision on Sustainability”](#).

| Units | Phase                                 | Idea of Phase  | Task Card  | Event Card  | Game Leader   | Moderator                           |
|-------|---------------------------------------|--|--|---|---|-------------------------------------|
| 2     | Preparation Presentation for Assembly | <p>Preparing presentation for General Assembly.</p> <p>Using time for informal discussions with other groups to prepare arguments.</p> | ⇒ <a href="#">“Preparation for General Assembly B: Decision on Sustainability”</a> | <p>For Management: ⇒ <a href="#">FFF intervention</a> (after 20 minutes)</p> <p>For Workers' Council: ⇒ <a href="#">Car broke down</a> (after 20 minutes)</p> | <p>Gives out Task Card ⇒ <a href="#">“Preparation for GA: Decision on Sustainability”</a> and indicates pause and when to continue.</p> <p>Gives out Event Cards after 20-30 minutes.</p> <p>Time management.</p> | Support for all groups when needed. |

The groups now have time to prepare for the next phase. In the phase, they are to work out their position and prepare a presentation for it. They should also think about the positions of the others and who stands for or against them.

For preparing the presentation the students should take 45 to 55 minutes. After this time, they can go to meet other groups, discuss with them for the first time and build alliances to represent the point of view together

This phase should be done by the students independently. They can take a break within the time window.

The Game Leader gives out the Event Cards “FFF Intervention” and “Car Brokes Down” after 20-30 minutes.

#### 6.2.2.4. General Assembly B: Decision on Sustainability (2nd round)

| Units | Phase  | Idea of Phase   | Task Card | Event Card | Game Leader     | Moderator   |
|-------|--|---|-----------|------------|-----------------|---|
| 3     | General Assembly: Decision on Sustainability | Every group presents a poster or presentation on their opinion and gives a statement for yes or no.<br><br>Discussion between groups.<br><br>Election | -         | -          | Time management | Opens second round<br>Hands over between groups.<br><br>Starts Discussion if necessary: Ask questions for vital discussion ⇒ <a href="#">examples.</a><br><br>Conducts the election.<br><br>Announces result. |

To structure presentations and discussions, the following schedule is intended to provide a framework for this phase:

1. Presentations (max. 30 min): All points of view will be heard; students should take notes to discuss later.
2. Break (5-10 min) in the groups to check own argumentation after hearing the other arguments and possibly change attitude. (Were our arguments and attitude strengthened or weakened by the other arguments?)
3. Discussion (45-50 min): Facilitator notes concessions and demands made. He/she records these on the whiteboard or with a poster.
4. Voting (5-10 min): Based on the documentation, students decide and cast their vote.

The Moderator welcomes the participants for the second round of the General Assembly. Each group is given the opportunity to express their opinion on the topic (in the form of a short presentation). The Moderator gives the floor to the first group. The other groups follow.

After all groups have presented, the Moderator opens the discussion. The Moderator makes sure that only arguments and not yet measures are discussed. In case of too detailed discussion in measures, the Moderator should intervene. Discussions about points of view and arguments are explicitly welcome. The discussion phase will mainly clarify hidden conflicts and different interests that are related to demands and needs. Who has to concede what in which decision? What happens if the organisation decides in favour of sustainability, what effects does this have for which stakeholders? These questions can be clarified in this phase. The Moderator structures and documents the discussion results for all to see.

If there are no contributions, the Moderator takes up positions from the presentations and asks other groups about them.

At the end of the discussion, the Moderator leads into the voting.

He first asks who is in favour of HEART setting itself up in a sustainable way and making this part of the purpose of the statutes. The participants vote by show of hands. He/she then asks for votes against. He/she announces the result.

#### 6.2.2.5. General Assembly: Measures (3rd round)

| Decision: Yes on Sustainability |  |  |   |                      |  |  |
|---------------------------------|--|--|---|----------------------|--|--|
| Units                           | Phase  | Idea of Phase  | Task Card   | Event Card           | Game Leader  | Moderator  |
| 3                               | Preparation measures for General Assembly in group | <p>Preparation Measures for GA.</p> <p>Collect ideas for measures and choose 1-3 measures.</p> <p>Operationalize 1-3 measures with team, timeline, next steps, budget, impact.</p> <p>Think about short term (&lt; 1 year), medium term (~5 year), long-</p> | <p>⇒ <a href="#">Preparation for General Assembly C: Decision on measures</a></p> <p>⇒ <a href="#">Worksheet measures</a></p> <p>⇒ <a href="#">Individual group</a></p> | Optional: Competitor | <p>Time management</p> <p>Support for all groups when needed</p> | <p>Support for all groups when needed</p> <p>Prepare a way for collecting measure Ideas</p> <p>Prepare a method for decision making (proposal: ⇒ <a href="#">dot voting</a>)</p> |

|   |   |   |                                   |   |                 |  |
|---|---|---|-----------------------------------|---|-----------------|--|
|   |   | <p>term (&gt;10 years).</p> <p>Use the ⇒ <a href="#">proposal for measures</a>, material of lecture, internet research and so on to justify your proposals.</p>   | <a href="#">infor-<br/>mation</a> |   |                 |  |
| 3 | <p>General Assembly C:<br/>Decision on measures</p> | <p>Present measures by each group.</p> <p>Decision on priorities and how to start.</p> <p>Discussion</p> <p>Decision on 5-7 measures short term (&lt; 1 year), medium term (~5 year), at least 1 long-term (&gt;10 years)), check budget constraints.</p> | -                                 | - | Time management | <p>Moderates discussion</p> <p>Moderates election</p> <p>Helps collecting measures</p> |

If the General Assembly decides in favour of yes, the Moderator leads into the question of what this should mean in concrete terms. He/she asks all groups to consider what measures they think need to be taken.

The facilitator gives all groups the event card "Preparation for General Assembly C: Decision on measures".

The groups work out their measures in a group phase based on the ⇒ [proposal for measures](#) (ECG-Matrix theme). But to hand out this proposal is not a must do, they can also do research on the internet or use lecture notes. You can take a break during the group phase.

The alliances that have formed can also work out the measures together in a group.

Each group should come up with 2 to a maximum of 3 measures. However, these should be drawn up in great detail. The groups should work on what costs the organisation will incur for



the measure, what time frame can be estimated and what benefits are associated with it for the organisation. In addition, they should describe which stakeholders' needs will be met by the measure and to what extent.

After the group phase, everyone meets again. The Moderator asks the first group to present their measures. The other groups add to the measures one by one.

The Moderator leads into a discussion about which measures the groups think will be short term (< 1 year), medium term (~5 year), at least 1 long-term (>10 years) and which ones "have the biggest impact". The Moderator also remembers to check if the measures are possible with the budget of HEART.

After the discussion, a vote is taken using sticky dots. Each person is allowed to vote for three measures. The Moderator announces the result.

He/she thanks everyone for their constructive cooperation and wishes HEART much success in the implementation.

The game ends.

| Decision: No on Sustainability |  |   |   |                                      |   |   |
|--------------------------------|--|---|---|--------------------------------------|---|---|
| Units                          | Phase  | Idea of Phase   | Task Card   | Event Card                           | Game Leader   | Moderator   |
| 1                              | General Assembly: 5 years later                    | If the general meeting has decided "no", a small time travel 5 years into the future to a general meeting takes place. The legal situation has changed. HEART is now forced to take measures for more sustainability.   | -   | ⇒ <a href="#">Sustainability law</a> | Play Event card<br>⇒ " <a href="#">Sustainability Law</a> " | -   |
| 2                              | Preparation measures for General Assembly in group | <p>Preparation Measures for GA</p> <p>Collect ideas for measures and choose 1-3 measures.</p> <p>Operationalize 1-3 measures with team, timeline, next steps, budget, impact.</p> <p>Think about short term (&lt; 1 year), medium term (~5 year), long-term (&gt;10 years).</p> <p>Use the ⇒ <a href="#">proposal for measures</a>, material of lecture, internet research and so on to justify your proposals.</p> | <p>⇒ <a href="#">Preparation for General Assembly C: Decision on measures</a></p> <p>⇒ <a href="#">Worksheet measures</a></p> <p>⇒ <a href="#">Individual group information</a></p> | Optional: Competitor                 | Time management   | -   |
| 3                              | General Assembly: Decision on measures             | <p>Present measures by each group.</p> <p>Decision on priorities and how to start.</p> <p>Discussion</p> <p>Decision on 5-7 measures short</p>  | -   | -                                    | Time management   | <p>Moderates discussion.</p> <p>Moderates election.</p> |

|  |  |   |  |  |  |  |
|--|--|---|--|--|--|--|
|  |  | term (< 1 year), medium term (~5 year), at least 1 long-term (>10 years), check budget constraints. |  |  |  |  |
|--|--|---|--|--|--|--|

If the General Assembly decides no, he/she announces the result. He/she ends the meeting.

The facilitator announces a break (approx. 5-10 minutes).

After the break, he/she calls all groups together again and reads out the event card "Sustainability Law". 5 years have passed since the general meeting.

The law now requires the organisation HEART to act for more sustainability.

He/she asks all groups to consider what measures they think need to be taken.

The facilitator gives all groups the event card "Preparation for General Assembly C: Decision on measures".

The groups work out their measures in a group phase based on the ⇒ [proposal for measures](#) (ECG-Matrix theme). They can also do research on the internet or use lecture notes.

You can take a break during the group phase.

The alliances that have formed can also work out the measures together in a group.

Each group should come up with 2 to a maximum of 3 measures. However, these should be drawn up in great detail. The groups should work on what costs the organisation will incur for the measure, what time frame can be estimated and what benefits are associated with it for the organisation. In addition, they should describe which stakeholders' needs will be met by the measure and to what extent.

After the group phase, everyone meets again. The Moderator asks the first group to present their measures. The other groups add to the measures one by one.

The Moderator leads into a discussion about which measures the groups think will be short term (< 1 year), medium term (~5 year), at least 1 long-term (>10 years) and which ones "have the biggest impact". The Moderator also remembers to check if the measures are possible with the budget of HEART.

After the discussion, a vote is taken using sticky dots. Each person is allowed to vote for three measures. The Moderator announces the result.

He/she thanks everyone for their constructive cooperation and wishes HEART much success in the implementation.

The game ends.

### 6.2.3. Evaluation/Debriefing

The Evaluation starts with a ritual for „Deprotagonisation“. After the game, it is important to leave the role you have taken.

Possibilities:

- Proverbially unroll oneself: Stand up and turn out of the role.
- Drink a sip of water.
- Look in the mirror and say your own name.
- Unroll the role over the arms

After Deprotagonisation this phase is important to classify the events of the game and make the learnings more explicit. These key questions support the Game Leader and Moderator to address the different aspects and layers. It is helpful, if the students are mixed and do not sit in their groups anymore - a line-up at the beginning assists this. It is important to keep an eye on the discussion, it should be the evaluation of the game, not to continue unsolved issues and not to settle open bills. Students that fall back into their roles should be interrupted and reminded of this.

#### 6.2.3.1. Line-up

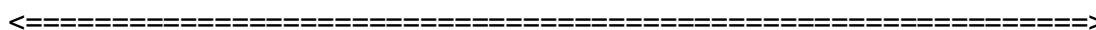
Draw an imaginary line through the room, all persons should have enough space to move. (If you and your students are not familiar with the methodology, you can start with a warm-up question to explain the process.

0. Are you...

an early bird



a late riser





### 6.2.3.2. Small group work

Students gather with their neighbours into groups of 2-3 students. They have 10 min to discuss these questions:

1. How do I feel about the results?
2. How did the game help me understand the overall subject in more depths? What is still unclear?
3. What did I learn today that could be useful to me in my future?

### 6.2.3.3. Individual work

Students have to individually answer these questions and prepare a one-minute statement:

1. The three key learnings I will take from today are....
2. I learned about myself....
3. To advance sustainability in organisations of the Social Economy it is most important to ...

### 6.2.3.4. Discussion

After the line-up the students are asked to take seats, ideally in a circle of chairs, mixed up from their groups.

1. Learnings  
Which theoretical knowledge from the course was helpful for your work today?
2. Experience  
Who was pushing their agenda forward and how did they manage to do this?  
Was this success already encapsulated in their role (structural power) or are there other success factors? (eg. engagement in team phase, perseverance in General Assembly, lack of commitment of others)  
Would you like to share something from your hidden agenda with the others?
3. Transferability  
How important is it to involve all stakeholders into the sustainability agenda?  
How important is it to underpin direct benefits?  
Any ideas, how to implement measures that do not benefit or even disadvantage stakeholders?

### 6.2.3.5. Check out

All persons (including the Game Leader and Moderator) do their one-minute statement.

### 6.3. Game Schedule

| Units                          | Phase                       | Idea of Phase   | Task Card                       | Event Card | Game Leader  | Moderator   |
|--------------------------------|-----------------------------|---|---------------------------------|------------|--|---|
| <b>Preparation before game</b> |                             |   |                                 |            |  |   |
| 4                              | Preparation in class        | The students are prepared for the business game. They are informed about the scope and the rough procedure. They receive information on what they need to prepare and bring with them. The groups are formed. | -                               | -          | Gives the necessary information.<br>Motivates!   | -   |
| <b>Simulation game</b>         |                             |   |                                 |            |  |   |
| 1                              | Onboarding                  | Familiarisation with roles and group  | ⇒ <a href="#">“Assignments”</a> |            | Welcome<br>Dividing groups<br>Hand out Task Card ⇒ <a href="#">“Assignments”</a> .<br>Give time for questions. |   |
| 1                              | General Assembly A: Welcome | Introduction of every group and their general positions and expectations  |                                 |            | Time management  | Opens the event.<br>Short overview over structure |



|   |                                       |  |   |  |   |  |
|---|---------------------------------------|--|---|--|---|--|
|   |                                       | <p>Every group gives a short (maximum 5 minutes) self-presentation.</p> <p>Tell the others who you are, what your general role in the organisations is, what are your expectations on decision, what's your slogan.</p> <p>Report on what you value about the organisation and what social aspects are important to you.</p> |   |  |   | <p>and goals of GA as external Moderator.</p> <p>Hands over to "Initial Group", then to the "Management" and then to every group for their presentation.</p> <p>Make sure that students do not yet name any measures.</p> <p>Closes the event.</p> |
| 2 | Preparation Presentation for Assembly | <p>Preparing presentation for General Assembly</p> <p>Using time for informal discussions with other groups to prepare arguments</p>   | <p>⇒ <a href="#">"Preparation for General Assembly B: Decision on Sustainability"</a></p> | <p>For Management: ⇒ <a href="#">FFF intervention</a> (after 20 minutes)</p> <p>For Workers'</p> | <p>Gives out Event Card ⇒ <a href="#">"Preparation for GA: Decision on Sustainability"</a> and indicates pause and when to continue.</p> <p>Gives out Event Cards after 20-</p> | <p>Support for all groups when needed.</p>   |

|                                 |  |   |                                  |  |                                    |   |
|---------------------------------|--|---|----------------------------------|--|------------------------------------|---|
|                                 |  |   |                                  | Council:<br>⇒ <a href="#">Car</a><br><a href="#">broke</a><br><a href="#">down</a><br>(after 20 minutes) | 30 minutes.<br><br>Time management |   |
| 3                               | General Assembly: Decision on Sustainability       | Every group presents a poster or presentation on their opinion and gives a statement for yes or no.<br><br>Discussion between groups.<br><br>Election |                                  |  |                                    | Opens second round.<br>Hands over between groups<br>Starts Discussion<br>if necessary: Ask questions for vital discussion.<br><br>Conducts the election.<br><br>Announces result. |
| Decision: Yes on Sustainability |  |   |                                  |  |                                    |   |
| 3                               | Preparation measures for General Assembly in group | Preparation Measures for GA.<br><br>Collect ideas for measures and choose 2-3 measures.   | Preparation for General Assembly | Optional: Competitor   | Time management                    | Support for all groups when needed.<br><br>Prepare a way for collecting measure Ideas   |

|   |  |  |                         |  |                 |   |
|---|--|--|-------------------------|--|-----------------|---|
|   |  | <p>Operationalise 2-3 measures with team, time-line, next steps, budget, impact.</p> <p>Think about short term (&lt; 1 year), medium term (~5 year), long-term (&gt;10 years).</p> <p>Use the <a href="#">proposal for measures</a>, material of lecture, internet research and so on to justify your proposals.</p> | C: Decision on measures |  |                 | Prepare a method for decision making (proposal: ⇒ <a href="#">dot voting</a> )            |
| 3 | General Assembly: Decision on measures | <p>Present measures by each group.</p> <p>Decision on priorities and how to start.</p> <p>Discussion</p> <p>Decision on 5-7 measures short term (&lt; 1 year), medium term (~5 year), at least 1 long-term (&gt;10 years), check budget constraints</p>  |                         |  | Time management | <p>Moderates discussion.</p> <p>Moderates election.</p> <p>Helps collecting measures.</p> |

| Decision: No on Sustainability |  |  |   |                      |  |           |
|--------------------------------|--|--|---|----------------------|--|-----------|
| Units                          | Phase  | Idea of Phase  | Task Card   | Event Card           | Game Leader  | Moderator |
| 1                              | General Assembly: 5 years later                    | If the general meeting has decided "no", a small time travel 5 years into the future to a general meeting takes place. The legal situation has changed. HEART is now forced to take measures for more sustainability.  |   | Sustainability law   | Play Event card "Sustainability Law" if decision to No |           |
| 2                              | Preparation measures for General Assembly in group | <p>Preparation Measures for GA</p> <p>Collect ideas for measures and choose 1-3 measures.</p> <p>Operationalise 1-3 measures with team, timeline, next steps, budget, impact.</p> <p>Think about short term (&lt; 1 year), medium term (~5 year), long-term (&gt;10 years).</p> <p>Use the <a href="#">proposal for measures</a>, material of lecture, internet research and so on to justify your proposals</p> | Preparation for General Assembly<br>C: Decision on measures | Optional: Competitor | Time management  |           |

|                              |  |  |   |   |                 |   |
|------------------------------|--|--|---|---|-----------------|---|
| 3                            | General Assembly: Decision on measures | <p>Present measures by each group.</p> <p>Decision on priorities and how to start.</p> <p>Discussion</p> <p>Decision on 5-7 measures short term (&lt; 1 year), medium term (~5 year), at least 1 long-term (&gt;10 years), check budget constraints.</p> | - | - | Time management | <p>Moderates discussion.</p> <p>Moderates election.</p> |
| <i>End of Game</i>           |  |  |   |   |                 |   |
| <b>Evaluation/Debriefing</b> |  |  |   |   |                 |   |

## 6.4. Checklist for Game Leader

*No new information is given in this section, this list summarises all the tasks in one spot.*

### **Before the game** (⇒ [Game material](#))

- Organise rooms
- Organise moderation material
- Print material
- Check out if the video input (FFF) works
- One day before the game starts: Hand out the game material ⇒ ([Role cards \(individual for each group\)](#)) and ⇒ ([Business Case \(for all\)](#))

### **Preparation phase**

- Give the necessary information
- Motivate

### **Onboarding**

- Welcome
- Group division with group division notes
- Hand out Task Card ⇒ [“Assignments”](#) – for all
- Answer questions

### **General Assembly A: Welcome (1st round)**

- Time management

### **Preparation Presentation for Assembly**

- Give out Task Card ⇒ [“Preparation for GA: Decision on Sustainability”](#)
- Time management
- Give out ⇒ [Event Cards](#) after 20-30 minutes
- Time management

### **General Assembly B: Decision on Sustainability (2nd round)**

- Time management

## Preparation measures for General Assembly in group

- Time management
- Give out Task Card ⇒ [“Preparation for General Assembly C: Decision on measures”](#),  
⇒ [“Worksheet measures”](#) and ⇒ [Individual group information](#)
- Play Event card ⇒ [“Sustainability Law”](#) if decision to No
- Support for all groups when needed

## General Assembly C: Measures (3rd round)

- Time management

## Evaluation/ Debriefing

- Deprotagonisation
- Line-up
- Small group work
- Individual work
- Discussion
- Check out

## 6.5. Checklist for Moderator

*No new information is given in this section, this list summarises all the tasks in one spot.*

### **Preparation phase**

- Support Game Leader with group division

### **Onboarding**

- Support Game Leader with hand out of material

### **General Assembly: Welcome (1st round)**

- Open the event
- Give short overview over structure and goals of GA as external Moderator
- Hand over to “Initial Group”, “Management” and then to every group for their presentation
- Close the event

### **Preparation Presentation for Assembly**

- Support for all groups when needed

### **General Assembly B: Decision on Sustainability (2nd round)**

- Open second round
- Hand over between groups
- Start Discussion if necessary: Ask questions for vital discussion
- Conduct the election
- Announce Result

### **Preparation measures for General Assembly in group**

- Support for all groups when needed
- Prepare a way for collecting measure ideas
- Prepare a method for decision making (proposal: ⇒ [dot voting](#))

### **General Assembly C: Measures (3rd round)**

- Prepare how measures are to be collected ⇒ [Worksheet measures](#)
- Moderates discussion
- Moderates election



- Help collecting measures

### **Evaluation/ Debriefing**

- Support Game Leader

## 6.6. Game Materials

The following materials must be prepared for the game:

|  |   |
|--|---|
| Rooms                                    | <p>Meeting room for General Assembly</p> <p>Several rooms/ spaces for group meetings</p> <ul style="list-style-type: none"> <li>● If students do not want to be in fixed rooms, exchange phone numbers for accessibility and make them available to all groups.</li> </ul> <p>The rooms should be equipped in such a way that students can interact with each other. For this purpose, the rooms should be large enough. The tables are best placed in a circle or in a U-shape.</p> <p>“Canteen” - social room for informal exchange between groups, this could be the real canteen outside the peak hours, a table with coffee and snacks or even only a corner with a “canteen”-sign</p> |
| Moderation Material                      | <ul style="list-style-type: none"> <li>● Pens</li> <li>● Flipchart</li> <li>● Whiteboard</li> <li>● Moderation cards</li> <li>● Sticky dots</li> <li>● Laptop and projector</li> </ul>  |
| Table sign and/or Name badges            | Table sign and/or name badges with Group Names  |
| <a href="#">Procedure Poster</a>         | Several times (A3 or bigger) for room   |
| Material <a href="#">“Business Case”</a> | Printout for every student  |
| <a href="#">Role cards</a>               | Printout for every Role-group   |
| <a href="#">Event cards</a>              | Printout for every role-group<br><b>Attention! Not every group gets every card</b>  |
| <a href="#">Task cards</a>               | Printout for every role-group   |
| <a href="#">Group division notes</a>     | Print-out for whole group   |
| Clock/Timer                              |   |

A map of the venue to be hung up next to the procedure poster is also advised, where each group marks the room where they are situated. The Game Leader marks the room for the General Assembly and the canteen.

6.6.1. Procedure Poster



**heart**

**help for humans**



# GENERAL ASSEMBLY

Decision about sustainability at  
heart

DATE | 9 - 17

**Only for members and guests**

## Procedure



|  |   |
|--|---|
| <i>8:00 - 09:00</i>                        | <i>Onboarding</i>   |
| <i>09:00 - 09:20</i>                       | <p><b>General Assembly: Welcome (1st round)</b></p> <ul style="list-style-type: none"> <li>• Introduction of every group and their attitude</li> </ul>                        |
| <i>09:20 - 10:30</i>                       | <i>Preperation Presentation for Assembly</i>  |
| <i>10:30 - 11:30</i>                       | <p><b>General Assembly: Decision on Sustainability (2nd round)</b></p> <ul style="list-style-type: none"> <li>• Proposal</li> <li>• Discussion</li> <li>• Decision</li> </ul> |
| <i>12:30 - 13:30</i>                       | <i>Preperation measures for Assembly</i>  |
| <i>13:30 - 15:00</i>                       | <p><b>General Assembly: Measures (3rd round)</b></p> <ul style="list-style-type: none"> <li>• Decision on measures</li> </ul>   |
| <hr style="border-top: 1px dashed #ccc;"/> |   |
| <i>16:00 - 17:00</i>                       | <i>Evaluation</i>   |

## 6.6.2. Business case

### Name: HEART - Association for humans

The small town of Smallington is home to 73,745 people. One of the organisations active in the town is HEART - Association for humans. The organisation HEART is active in three fields of social work: Help for the elderly, help for the disabled and help for people in need.

The organisation HEART was founded in 1998 with the aim of helping people in need and enabling people with disabilities to participate in working life by Joe Mueller. Joe Mueller's motto was "Make the world a little better every day". Joe Mueller retired from day-to-day business in 2017 and has since been on the board of HEART. Since then, the association has grown considerably and has added new fields of work.

HEART operates:

- Assisted individual living for people with disabilities
- Counselling centre for people in need
- Centre kitchen

| <b>Employees</b>                                      | Heads of employees |
|---|--------------------|
| In sum  | 39                 |
| Assisted individual living                            | 20                 |
| Counselling centre for people in need                 | 5                  |
| Kitchen   | 9                  |
| Administration  | 5                  |
| Part-time rate  | 41%                |
| Retirement rate in the next 5 years                   | 11%                |
|   |                    |
| <b>Customers</b>                                      |                    |
| Assisted individual living                            | 110                |
| Counselling centre for people in emergency situations | 512                |

| <b>Financial figures (Last year)</b> | Absolut     | In % |
|--------------------------------------|-------------|------|
| Turnover                             | 1,773,958 € |      |
| Profit                               | 35,479 €    | 2%   |
| Income, detailed                     |             |      |
| From the state through fee contracts | 1,543,344 € | 87%  |
| Donations                            | 230,615 €   | 13%  |

There is also **assisted individual living** for about 110 people spread across the city and the surrounding area (within a radius of 15 kilometres). There are shared flats and individual flats where people with disabilities live and are regularly visited and cared for by HEART staff. About half of the people receive a lunch menu from HEART's central kitchen.

The HEART administration and a **counselling centre for people in need** (e.g. homelessness) are located directly in the city centre in a new building. Last year, 512 people visited the counselling centre. Five social pedagogues work there.

A total of five people work in the **administration**.

The **Central Kitchen** cooks fresh lunch menus daily. It delivers the hot lunch menus to people of assisted individual living, to three kindergartens of HEED (competition of HEART) and a nursing home of HEED. There are also three people with disabilities working in the kitchen.

Financially, HEART is in a good position. Last year they had a profit of 35,479 €, which went into the reserves. They receive 87% of their income from the state through fee contracts, the rest they have to generate through donations.

Due to their commitment to people in need, HEART enjoys a good reputation in Smallington. However, they are also feeling the effects of the shortage of skilled workers. It is becoming increasingly difficult to fill new positions and in the next five years 11% of the staff will retire.

## **Mission & Vision**

Mission: Already from the start, our aim has been to help people in need. We respect every human being, regardless of their religion, national or cultural origin, or sexuality. We value every person the same.

Vision: We stand for freedom and justice and believe in a world in peace and without violence. Our vision is a society in community, respect, and solidarity.

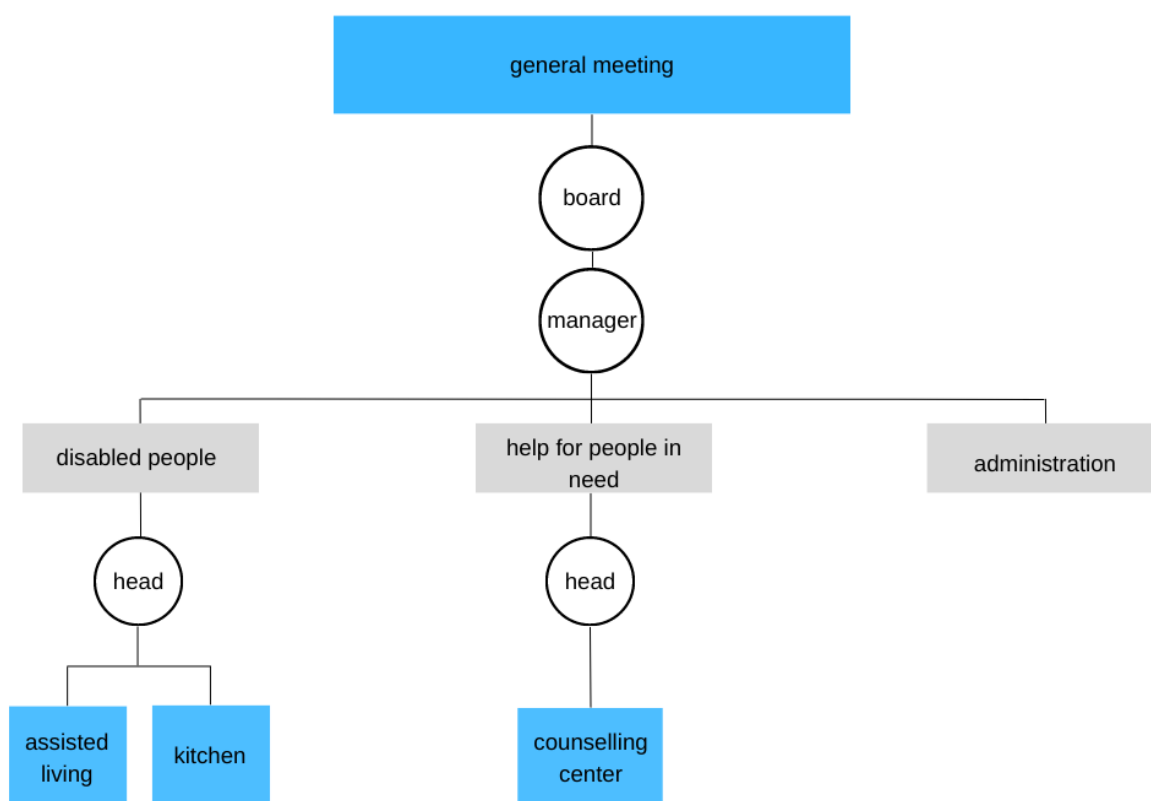
Political attitude: Our values are based on humanism. We engage in human rights. We remain neutral and impartial in any kind of political, ethnical, or religious contention.

Work philosophy: We work with highly professional and qualitative standards. We value clear structures and therefore have a clear distribution of responsibilities within the organisation.

### Organigram

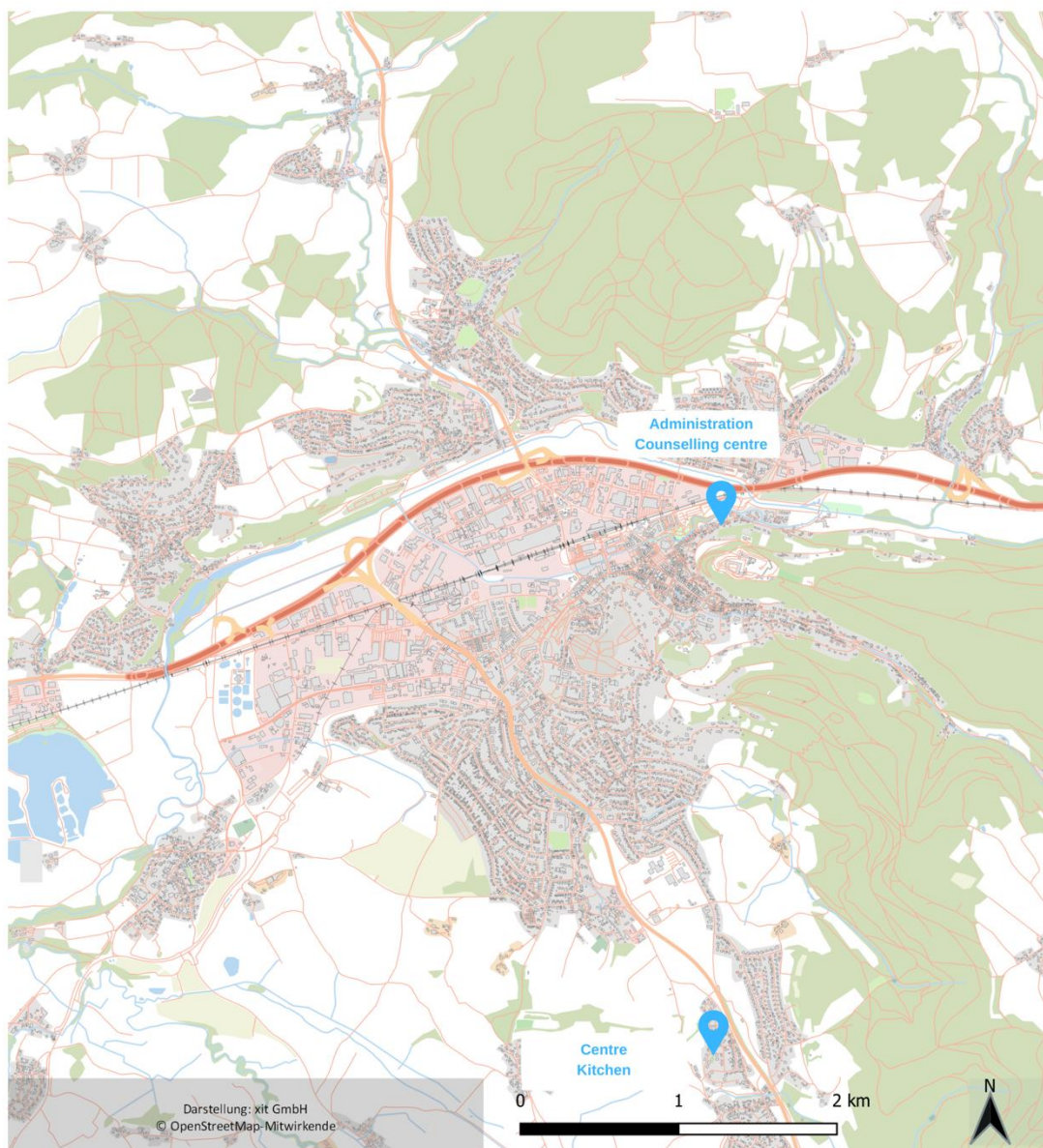


### heart - help for humans





## Map



### Legal form: association

75% of those present must agree to a change in the statutes.

### Environment

Smallington is a small town in a rural area of your country. The next big city is 1½ hour driving, the city has a theatre and two cinemas. There is no noteworthy tourist activity and no university in the town. The city has a train connection and within the city limits good public transport with 8 bus lines, the surroundings have rather poor public transport links.



Leisure facilities consist of the local football team, swimming ponds in the West and extensive hiking paths in the local hills.

## Competitors

- **HEED - Help and Empowerment Efforts for Disadvantaged persons**
  - Similar size to HEART
  - Covers kindergartens and nursing home
  - Offers assisted individual living in the surrounding of Smallington (has fewer clients as HEART at the moment )
  - There was a report in the press recently that the new management plans to focus on sustainability.
- **CoCo - The Companion Company for people in need**
  - Smaller than HEART
  - Cheaper but lower quality
- **SMILE - Smallington's NGO to Make Impoverished Life Easier**
  - Smaller than HEART
  - Cheaper but lower quality

## Political situation

The city is governed by a centre-left mayor, the county as a centre-right government. There are no elections upcoming in the close future.

## Corporate Culture

New ideas need a lot of convincing. There are clear hierarchies.

Reputation: it is generally known that the organisation does good social work.

## Economic situation of HEART

Last negotiations with the funding body: 2.5% more budget.

## Premises

The organisation HEART consists of an administration. Beyond that there is office space for counselling centre, meeting rooms and office workstations.

The central kitchen is in a building on the outskirts of the city. The premises are rented.

## **Fleet**

The fleet consists of two Transporter Caddy (one of them so old nearly reaching end of life) to shuttle the clients.

To deliver the meals HEART has another Transporter Caddy on its own. Furthermore, a few meals to clients, who live far away, are delivered by taxi.

The employees in the assisted individual living have five pool-cars at their disposal - a sophisticated logistic software tool enables all employees to have access to a company car when needed.

The CEO drives his/her own company car, a two year old BMW 5.

## **Equipment**

The central kitchen has equipment that is 15 years old.

They get their electricity from the municipal utility company and also get their gas for heating from there. The new building in the city centre is insulated according to current standards - the other buildings are at the level of 25 years ago.

### **6.6.2.1. The Story...**

During a communication training session, two staff members from the counselling centre and two from the disability support service get into a conversation during the break. One of them says that they have started to avoid plastic at home since her daughter is very involved in "Fridays for future" and they discuss at home whether they can still go on holiday or not. The other colleagues have had similar experiences and are also interested in the topic of sustainability. However, they have all quickly realised that avoiding plastic at home is not enough. One of them asks, "What if we were to work for more sustainability at HEART? Wouldn't that make the world a better place?"

They discussed the idea. Finally, they want to start at HEART to make their contribution for a sustainable future in the ecological, social and economic sense. They arrange an appointment with their management to present their idea.

The managing director said: "I can't decide that on my own, the general meeting has to decide on that."

### 6.6.3. Role Cards

#### 6.6.3.1. Game Leader

You are the organiser of the game. Your tasks are to:

- Distribute all materials at the beginning of each new phase and shortly explain it.
- During the game phases, walk around, make sure everyone understands what to do, answer questions. In the General Assemblies, your role is rather passive. Listen to what the participants say and make sure the tasks are understood right but intervene only if absolutely necessary.
- Play the Event Cards to the right moments.
- Organise the time management, start and end the game phases, and coordination of breaks.

### 6.6.3.2. Moderation

You are an external Moderator that has been invited to neutrally moderate the General Assemblies.

- You are not the Game Leader: The players should not recognise you as an organiser or second Game Leader. You can help in the coordination, but rather in the background. If there is only one person available for both roles, or the Game Leader needs your support more strongly, you can also be involved in the organisation - in this case, we recommend to use a specific item (e.g. cap/hat, scarf, button glasses, ...) in order to make clear when you are acting as the organiser and when as the Moderator (psychological role switch).
- During the game phases, walk around, make sure everyone understands what to do, answer questions.
- Your main job is to lead the general assemblies in a neutral and structured way. You can coordinate when who speaks, give a framework to the discussions by leading the players from one topic to another. Thereby, make sure the discussion stays at the topic, that everyone has the opportunity to say something, and that the discussions are not turning circles, but that they meet the objective (present prepared materials, discuss, come to decision, etc.) and make it very clear, which phase it is. A clear timeframe supports that. It is helpful to have the tasks and questions given to the groups in front of you and use the different task steps as framework. Moderation also supports the process, if you wrap up the main key talking points of each group very precisely prior to the decisions. Also keep in mind the hidden power structures - e.g. the management has the biggest say, even if they have the weakest arguments.

Lead questions to have lively discussions in the general assemblies include:

- Group X is of the position that... . As a representative of customers/employees, what is your position?
- This argument addresses the concerns of customers/employees. As a manager/client representative/employee representative, what is your response?
- The following arguments were made for .... The following arguments have been made against ... the introduction of sustainability management. How can we balance you? Do you have any ideas?
- Visualise HEART's mission to "...". What does this mission mean for the topic of sustainability? What arguments are in the spirit of the mission?
- You have expressed concerns (...). Do any of the participants have ideas to minimise these raised risks?

- Let's do a thought experiment. HEART becomes the most sustainable organisation in the region. What will HEART look like in 5 years?
- Let's do a thought experiment. HEART is not changing. What will HEART look like in 5 years?
- I see you are concerned that sustainability will jeopardise HEART's economic situation. On what do you base this concern? What exactly costs so much?

### 6.6.3.3. All players

Stay in your role as far as possible.

Do not change your mind lightheaded but stand your ground as far as possible.

Do not insist on your position headstrong, but let arguments convince you.

Be on time for the meetings.

Be available for interaction with others in between.

Get involved - this is the best way to have fun and an insightful learning experience at the same time!

#### 6.6.3.4. Management

##### **History and role in the organisation**

You are the lead of HEART and have worked together for many years. You are known and respected by everyone. You take care of the day-to-day operations and implement the strategy of the directors. In your daily business, you are responsible for overall management, budget constraints and the further development of the services. You represent the organisation as a whole, with the employees and clients interests, as well as with the intentions of funding bodies, board members, members and donors. Also, you need to keep an eye on the public interest. Your aim is to assure the organisation's success - which means having happy employees and clients on the inside, satisfied stakeholders on the outside, and a stable economic situation.

As top management, you have the highest decision power. However, due to your representative function, you need to have an eye on everyone's interests and avoid any disadvantageous conflicts that could lead to a failure of the organisation.

##### **What happens before the General Assembly...**

The Initial Group presented to you its idea about HEART as a sustainable organisation. They already have some ideas about what could be done:

- Define targets and measures for the three pillars of sustainability
- Implement measures, e.g. install solar panels on the buildings, regular training and webinars for all employees on the topic of sustainability, regional purchasing.

You reacted in a wait-and-see and ambivalent way. On the one hand, you liked the idea because the competition announced in the press that they would become more sustainable. On the other hand, you are worried about how much it will cost. In addition, you are sure that not all employees would like the idea. You said: "I can't decide that on my own, the general meeting has to decide on that."

Before the General Assembly you thought about possible strengths and weaknesses of HEART in terms of sustainability:

- Is HEART diversified at all levels of the hierarchy?  
  
All heads are male between 50 and 65 years old, despite the female manager.
- How does the kitchen work? Are its actions sustainable?

The kitchen sources its products almost exclusively from a large grocer. The major grocer of the central kitchen is suspected of sourcing products from suppliers that pay below subsistence wages, have fired union members and force employees to work unpaid overtime.

The food is cooked in the central kitchen and delivered hot. Delivery is made by transporter caddy to the three kindergartens and the nursing home van. Reusable boxes are used for this purpose. One to four taxi cabs bring the food to people in Smallington and the surrounding area. Recyclable containers are used for this, and the customers in the assisted individual living dispose of them themselves. Customers are dissatisfied with the food, as it is sometimes already cold.

Leftover food is disposed of in the kindergarten and nursing home of HEED and re-transported to the central kitchen and disposed by a specialist Re-food disposal company. The food waste is about 15% on average.

- When purchasing (i.e. furniture, hygiene products, food), is attention paid to regional and seasonal products? Does HEART award contracts to local suppliers?

HEART assigns craftsman services to companies from Smallington and the surrounding area. Only the price plays a role in the purchase.

- How do employees get to work?

Every worker uses their own car.

- And what about CO<sub>2</sub>-Emissions? Is electricity obtained from renewable energies?

Employees know nothing about the power supply or possible other levers for CO<sub>2</sub>-Emissions. HEART hasn't the money to pay more for energy.

### **Role/position in the game**

The Initial Group, a group of employees in all resorts, has asked you to present their proposal of sustainability in the next General Assembly. They were very passionate about the topic. Therefore, to avoid employee protests, you allowed them to do so.

What concerns sustainability, you have a rather open point of view. Sustainability is an option to you – it might for example be good for the organisation's strategic positioning on the market. However, there are more important things on your agenda: You are concerned about the shortage of skilled workers and you need to reassure the organisation's funding. In your point



of view, it is better to put as little effort as possible into sustainability, unless there are unavoidable necessities or great advantages connected to it. You want to uphold and improve public perception and aim that HEART is perceived as a modern, sophisticated organisation.

ALWAYS KEEP THE ORGANISATION'S SUCCESS IN MIND.

### **Hidden Agenda**

Your hidden agenda is you want the organisation to sail through calm waters – your spouse is considering a divorce, and you promised to work less. Therefore, you are sympathising with the idea of Greenwashing.

### **Reminder**

Imagine, you would be the management of a real social organisation: Until a certain point, you are always influenced by your personal opinion. In your specific role, it is allowed to you to consider this personal opinion, also within the game. However, it should be subordinate – try to find the balance between your personal point of view and your professional perspective as a manager.

### 6.6.3.5. Initial Group

#### **History and role/position in the organisation**

You are a group of employees working at HEART. You have always had a strong favour for a sustainable lifestyle and are investing a lot of your energy into it in your private time. Now, you think it is also time to do so in the organisation.

Normally, you work in all different resorts – council centre for people in need, help for disabled people, administration, etc. You haven't known each other for long, but you teamed up due to your sustainable motivation. Since you are only “normal” employees, your influence and decision power is rather weak. But you are perseverant and straightforward, and will give what it costs to achieve your aim – as long as it doesn't mean giving up your job.

#### **What happens before the General Assembly...**

Your group was founded in a communication training session, where one asked, “What if we were to work for more sustainability at HEART? Wouldn't that make the world a better place?”

Another participant, Mr. Miller, in the training heard the conversation and intervened: his organisation (CHANGE – association for youth) has set up a sustainability initiative and was awarded a sustainability prize last year. He offered to talk about how to become a sustainable social organisation.

The others liked the idea. They exchanged numbers and made an appointment.

Mr. Miller explained: CHANGE...

- established sustainability manager who advises on central decisions (e.g. purchasing, new construction, business models), conducts analyses of existing processes, uncovers optimisation potential for sustainability. Furthermore, she is responsible for the sustainability report and the materiality analysis.
- did a materiality analysis according to the Economy for the Common Good (ECG).
- created a sustainability report according to the Economy for the Common Good (ECG).
- cares about ecological, social and economic goals.
  - ecological focus: water, waste, energy
  - social focus: training and education for employees and customers (young people), diversity in employees
  - economic focus: economic performance

You were convinced and wanted to achieve that HEART also develops into a comprehensively sustainable organisation.

After studying the Economy for the Common Good, they also notice possible problem areas for HEART:

- How does the kitchen work? Are its actions sustainable?

The kitchen sources its products almost exclusively from a large grocer. The major grocer of the central kitchen is suspected of sourcing products from suppliers that pay below subsistence wages, have fired union members and force employees to work unpaid overtime.

The food is cooked in the central kitchen and delivered hot. Delivery is made by transporter caddy to the three kindergartens and the nursing home. Reusable boxes are used for this purpose. One to four taxi cabs bring the food to people in Smallington and the surrounding area. Recyclable containers are used for this, and the customers in the assisted individual living dispose of them themselves. Customers are dissatisfied with the food, as it is sometimes already cold.

Leftover food in the kindergarten and nursing home of HEART is transported back to the central kitchen and is disposed of by a specialist Refood disposal company. The food waste is about 15% on average.

- How do employees get to work?

Every worker uses their own car.

- What means of transport do the carers of people with disabilities use in assisted living?

The employees of assisted individual living have five pool-cars at their disposal – a sophisticated logistic software tool enables all employees to have access to a company car when needed.

One Carer uses her own bike to visit Clients living in the Centre of Smallington.

Furthermore, there are two Transporter Caddy (one of them so old nearly reaching end of life) to shuttle the clients.

- The decisions of the management are partly non-transparent, as is the financial situation of HEART. Could dealing with the issue of economic sustainability also offer an opportunity here?

Large, but also small decisions are sometimes not comprehensible for the staff at HEART.

In every meeting of management and executives, the manager emphasises HEART's tight economic situation. The managers also pass this information on to the employees. However, it is unclear to the employees in the individual areas, such as the central kitchen, counselling centre, etc., whether their area is affected. So, for example, is the counselling centre itself a profit or a loss and therefore the economic situation of HEART is tense? The employees do not know what consequences an "economically strained situation" has for their daily work and what this means for their future. Some employees are unsettled.

You agreed: only reducing waste and saving water is not enough to make the world more sustainable. You want to start at HEART to make their contribution for a sustainable future in the ecological, social and economic sense. You arrange an appointment with your management to present your idea.

They already have some ideas about what could be done:

- Define targets and measures for the three pillars of sustainability
- Implement measures, e.g. install solar panels on the buildings, regular training and webinars for all employees on the topic of sustainability, regional purchasing.

The managing director said: "I can't decide that on my own, the general meeting has to decide on that."

### **Role/position in the game**

You have been planning to carry sustainability into the organisation already for a while and are highly motivated to do so. As average employees, you normally do not take part in higher strategic meetings such as the General Assemblies. However, you were able to work out a plan with your team and some weeks ago, you got the management convinced to give you the permission for presenting a proposal about a sustainability agenda in the next General Assembly.

In your opinion, paperwork and detailed strategic plans are not helpful, if they don't get realised – you are rather focused on concrete fast and impactful actions, since they are what makes the impact.

ALWAYS KEEP YOUR GOAL IN MIND.

### **Hidden Agenda**

You know that, during the process, you need to pay special attention to management's opinion and interests: They have the highest decision power and may be able to influence other parties. Therefore, you would really like to have them on your side.

### **Reminder**

Until a certain point, you as a person are always influenced by your own opinion. However, in your specific role, try to think in the perspective of the role you are in. Even if you as a person have a different opinion – in this game, your personal opinion should be subordinate.

### 6.6.3.6. Workers' Council

#### **History and role/position in the organisation**

Imagine yourself as a social worker by calling – working for disadvantaged persons was your dream job, the possibility to improve the working conditions for all involved fills you with pride. As the Workers' Council, you have been elected by the employees in order to represent their interests in front of your employer. These interests can for example be financial, social, or professional concerns. You meet regularly to discuss the working conditions in HEART. Next to your position as council members, you are also normal employees, working in all different resorts of the organisation. In the current team, you have been working for two and a half years. After a total of four years, a new council will be elected.

In your position, you have a medium decision power. Formally, your opinion is inferior to the management and the board. However, the management prefers to have a good relationship with you since you have a high influencing power on the employees. There is a reason why you have been elected – you are perseverant and take a stand that no decision is made without your agreement.

#### **What happened before the General Assembly...**

Before the General Assembly you thought about possible strengths and weaknesses of HEART in terms of sustainability:

- Is HEART diversified at all levels of the hierarchy?

All heads are male between 50 and 65 years old, despite the female manager.

- How does the kitchen work? Are its actions sustainable?

The kitchen sources its products almost exclusively from a large grocer. The major grocer of the central kitchen is suspected of sourcing products from suppliers that pay below subsistence wages, have fired union members and force employees to work unpaid overtime.

The food is cooked in the central kitchen and delivered hot. Delivery is made by transporter caddy to the three kindergartens and the nursing home. Reusable boxes are used for this purpose. One to four taxi cabs bring the food to people in Smallington and the surrounding area. Recyclable containers are used for this, and the customers in the assisted individual living dispose of them themselves.

- When purchasing (i.e. furniture, hygiene products, food), is attention paid to regional and seasonal products? Does HEART award contracts to local suppliers?

HEART assigns craftsman services to companies from Smallington and the surrounding area. Only the price plays a role in the purchase.

- How do employees get to work?

Every worker uses their own car.

- What means of transport do the carers of people with disabilities use in assisted living?

The employees of assisted individual living have five pool-cars at their disposal – a sophisticated logistic software tool enables all employees to have access to a company car when needed.

One Carer uses her own bike to visit Clients living in the Centre of Smallington.

Furthermore, there are two Transporter Caddy (one of them so old nearly reaching end of life) to shuttle the clients.

- The decisions of the management are partly non-transparent, as is the financial situation of HEART. Could dealing with the issue of economic sustainability also offer an opportunity here?

Large, but also small decisions are sometimes not comprehensible for the staff at HEART.

In every meeting of management and executives, the manager emphasises HEART's tight economic situation. The managers also pass this information on to the employees. However, it is unclear to the employees in the individual areas, such as the central kitchen, counselling centre, etc., whether their area is affected. So, for example, is the counselling centre itself a profit or a loss and therefore the economic situation of HEART is tense? The employees do not know what consequences an "economically strained situation" has for their daily work and what this means for their future. Some employees are unsettled.

- And what about CO<sub>2</sub>-Emissions? Is electricity obtained from renewable energies?

Employees know nothing about the power supply or possible other levers for CO<sub>2</sub>-Emissions.

### **Role/position in the game**

You have already heard about the so-called Initial Group and about its plans to present a proposal about sustainability in the next General Assembly.

The whole topic of sustainability makes you worry. Sustainability might have some negative effect on the employees – it would mean more effort, therefore a higher workload for each person. In your opinion, it is much more important to focus on present problems, and not on future ones – such as for example the shortage of skilled workers and the poor payments in the social sector, making workplaces unattractive.

You are not against sustainability – but definitely against everything that could lead to disadvantages for the employees. They are afraid that the measures to improve sustainability will cost a lot of money and thus reduce the opportunities for wage increases or voluntary additional benefits for employees.

### **Hidden Agenda**

In around one year, there will be elections for the new Workers' Council. Of course, you would like to maintain your position. Therefore, you are strongly motivated to have all decisions and strategies made meeting the interests of the majority of the employees.

### **Reminder**

Imagine, you would be the Workers' Council of a real social organisation: Until a certain point, you are always influenced by your personal opinion. In your specific role, it is allowed to you to consider this personal opinion, also within the game. However, it should be subordinate – try to find the balance between your personal point of view and your professional perspective as a representative for the employees of HEART.



### 6.6.3.7. Board of Directors

#### **History and role/position in the organisation**

##### Person 1:

Imagine yourself as a successful business lady with an attitude that helping disadvantaged people is an important mission for prosperous people and your participation in this board is of big importance to advance the cause and to boost your karma points.

As the Board of Directors, you are the representative committee for the organisation's image, vision, and values. You are also responsible for developing the corporate strategy. Subject of your interest is the organisation's situation as a whole - with its economic stability, as well as its public image, employability and the external impact. You always have the "bigger picture" in mind.

Most of you have been members of the board for many, many years - some even since the very founding day of HEART. Normally, you meet twice a year to retrospect the past months, the success and the failures that HEART has achieved or was confronted with, and the risks and chances the future might bring. Your committee consists of the original founder of HEART and a couple of other important persons with a certain amount of public influence and a wide network of connections.

In your position, you have a rather high decision power. You are not involved in the daily business - but you have a guardian function of its original idealistic aim, as well as its economic goals. And: of course, none of you wants to lose their position on the board.

##### Person 2:

You are the heir to a successful family business. You invest a part of your fortune in HEART to "do something good". You are aware that the return on investment in social organisations is low, but you do not want to reduce the value of your assets. You are an advocate of traditional corporate governance. Your guiding principle is "Never change a running business."

You are not involved in the day-to-day operations, but you want to be regularly informed about HEART's financial situation. Sometimes you are confused about the numbers and fear that they are not correct and that your assets are in danger. You have expressed your concerns in intimate conversations with the manager. She was able to reassure you and held out the prospect that HEART is on its way to a stable and well-funded phase.

## What happened before the General Assembly...

When you get the invitation to the General Assembly, you wonder about the topic. But then thought about it:

- When purchasing (i.e. furniture, hygiene products, food), is attention paid to regional and seasonal products? Does HEART award contracts to local suppliers?

HEART assigns craftsman services to companies from Smallington and the surrounding area. Only the price plays a role in the purchase.

- How do employees get to work?

Every worker uses their own car.

- And what about CO<sub>2</sub>-Emissions? Is electricity obtained from renewable energies?

Employees know nothing about the power supply or possible other levers for CO<sub>2</sub>-Emissions. HEART hasn't the money to pay more for energy.

## Role/position in the game

### Person 1:

You have already heard about the so-called Initial Group and about its plans to present a proposal about sustainability in the next General Assembly.

Sustainability in the Social Economy - you do not know what to think of this idea. On one hand, it could have a positive effect on HEART's public image - being sustainable means being modern, fashionable. It could be useful for marketing and make a good PR. You might even be able to target new clients with these sustainability measures that have been out of question until now. However, it could negatively affect the economic situation, since sustainable products and services will increase many cost aspects. And, it could distract the organisation from meeting its original objective - to help people in any life situation. What you do know is that, whatever happens, it must not contradict the original aim of HEART intended by the founder and the constitution. Therefore, you are waiting for the official proposal with interest, but also scepticism. In your opinion, everything is good the way it is now.

### Person 2:

You think sustainability is a good thing, as long as it doesn't jeopardise the financial situation. You can imagine giving HEART a "green image". This would probably go down well with both government institutions that fund HEART's services and private donors.

But you suspect that the initiators of the sustainability idea want to see real change at HEART. But that is too risky for you. In this sense, you see a change to a sustainable company as a great risk for HEART and also for the money you have contributed. In addition, you fear that in the worst case (if HEART becomes insolvent) you will have to assume liability with your other assets. You are not prepared to do that under any circumstances.

### **Hidden Agenda**

None wants to lose their position in the board, so your opinion is open to change - with good and safe arguments.

### **Reminder**

Imagine, you would be the Board of Directors in a real social organisation: Until a certain point, you are always influenced by your personal opinion. In your specific role, it is allowed to you to consider this personal opinion, also within the game. However, it should be subordinate - try to find the balance between your personal point of view and your professional perspective as a board member.

### 6.6.3.8. Board of Clients

#### History

Imagine yourself as a young man who studied physics prior to his accident that made a wheelchair necessary - your dream is to continue your academic career, but your injuries make this impossible. So now you are highly motivated to improve the quality of life for all clients, to find a new meaning. Or imagine yourself as an old lady, a customer who gets food delivered. The lady had her own marketing agency before her retirement and wants to still stay active and be taken seriously in her matters. Acknowledgement is what drives her.

#### Role/position in the organisation

You are an elected board from all the clients of HEART, which consist of elderly people, people with physical and intellectual challenges. You are elected for one year and ten months of that period have passed.

#### What happened before the General Assembly...

When you get the invitation to the General Assembly, you wonder about the topic. But then thought about it:

- How do employees get to work?

Every worker uses their own car.

- What means of transport do the carers of people with disabilities use in assisted living?

The employees of assisted individual living have five pool-cars at their disposal - a sophisticated logistic software tool enables all employees to have access to a company car when needed.

One Carer uses her own bike to visit Clients living in the Centre of Smallington.

Furthermore, there are two Transporter Caddy (one of them so old nearly reaching end of life) to shuttle the clients.

- What about the clients? Are they satisfied?

Counselling for people in need: It is not known how satisfied the clients are. The image of the counselling is good.

Assisted individual living: It is also unclear whether the clients of assisted living are satisfied with the service overall. The employees are only aware of satisfied and dissatisfied individual cases, but no overall evaluation is carried out. A few clients want the Board of Clients to step in for more activities, e.g. visits to the theatre, cafes, walks in the Smallington city park.

Central kitchen: A few persons of assisted individual living are unsatisfied with the food as it is cold. The nursing home is very satisfied with the meals. One kindergarten complains that the portions are too big for the children.

- And what about CO<sub>2</sub>-Emissions? Is electricity obtained from renewable energies?

You know that several clients participated in an energy consultation with the local electricity supplier.

### **Role/position in the game**

The most important issue for you is the impact on the clients. You have no special interest for or against sustainability, but arguments must be convincing to get your vote, especially the need to justify that the measures taken do not influence negatively or improve the quality of care. You know that sustainability measures will cost a lot of money. But you want this money to go to the clients and they should have a direct benefit from it. You want to improve the quality of counselling through more training for employees and digital equipment in the counselling centre to offer online counselling.

You also want to create a meeting place for people with and without disabilities. You also need money for this.

### **Hidden Agenda**

Being re-elected is the only career move left for you. Therefore, you need the approval of the other clients and will not yield into anything which is not a clear, easy communicable advantage to them.

### **Private opinion**

As a physicist you know that the laws of nature and the ecological boundaries of the planet clearly contradict the widespread model of infinite economic growth - reduction, sufficiency and saving is therefore the logical conclusion.

## **Reminder**

Imagine, you would be a member of the Board of Clients in a real social organisation: Until a certain point, you are always influenced by your personal opinion. In your specific role, it is allowed to you to consider this personal opinion, also within the game. However, it should be subordinate - try to find the balance between your personal point of view and your professional perspective as a representative for the employees of HEART.

### 6.6.3.9. Members & Donors

#### **History**

Some of you founded the predecessor “neighbourhood assistance for disabled” more than 20 years ago, which later evolved, expanded and professionalised into HEART. Imagine yourself as a parent, who has a grown-up special needs daughter that is looked after here. Or imagine you as someone, who has inherited a large sum of money, which is partly donated to HEART every year to underpin your philanthropic attitude. Or as someone who is successful at the job and had some lucky strikes and wants to return this favour back to society as a whole.

#### **Role/position in the organisation**

You are a group of people that have a close personal involvement in the HEART organisation, which is more emotional than to tackle the daily business. It is important to you, that you feel good with your donations, and they are spent “the right way”. You are little interested in the day-to-day decisions and procedures but are more intrigued by the big picture. You are idealistic and visionary and prefer it when everybody feels good.

#### **What happened before the General Assembly...**

When you get the invitation to the General Assembly, you wonder about the topic. But then thought about it:

- How do employees get to work?

Every worker uses their own car.

- When purchasing (i.e. furniture, hygiene products, food), is attention paid to regional and seasonal products? Does HEART award contracts to local suppliers?

HEART assigns craftsman services to companies from Smallington and the surrounding area.

- How does the kitchen work? Are its actions sustainable?

The food is cooked in the central kitchen and delivered hot to individual persons, kindergartens and a nursing home.

- What about the clients? Are they satisfied?

Counselling for people in need: The image of the counselling is good. You know people who are very glad that HEART's counselling centre helped them.

Assisted individual living: You know that some people with disabilities are satisfied with HEART's work. A member's brother and his friends, who live in a shared apartment supported by HEART's assisted individual living, want more help to live more independently and to participate more in social life (i.e. visit concerts, theatre, festivals). How other people with disabilities see it, you don't know.

Central kitchen: A few persons of assisted individual living are unsatisfied with the food as it is cold. You have heard that the meal tastes good, but the kindergarten complains about too big portions.

### **Role/position in the game**

An extraordinary external perception of HEART is what drives you. You want to invest your money into something that is renowned. Sustainability is a new topic for you, so as a starting point greenwashing to keep up appearances would also be a good option.

### **Hidden Agenda**

The social dimension is most important, then there is the economic one - to which you contribute. The ecological dimension is least important - windfall profits and low hanging fruits are the line of approach.

### **Private opinion**

Business and leisure travels around the world are your lifestyle. You would have a bad conscience regarding your Ecological Footprint, if you would allow these thoughts. To sooth your conscience you focussed on social challenges - and might also react slightly irrational disapproving when confronted with ecological challenges.

### **Reminder**

Imagine, you would be a member or donor in a real social organisation: Until a certain point, you are always influenced by your personal opinion. In your specific role, it is allowed to you to consider this personal opinion, also within the game. However, it should be subordinate - try to find the balance between your personal point of view and your professional perspective as a representative for the employees of HEART.



### 6.6.4. Task Cards

Task Cards are reminders.

They are given to each group at the beginning of each team phase to support them with a written task, after the Game Leader has announced the beginning of a new phase and has spoken about the upcoming task.

Reminder: in team phase 2 the groups get different tasks.

#### 6.6.4.1. Assignments

| Type      | Name        | For whom | When                    |
|-----------|-------------|----------|-------------------------|
| Task Card | Assignments | @all     | Beginning of onboarding |

1. Find a spot where your group will be working in the team phases - and tell the others in the General Assembly A where you can be approached for consultations.
2. If you received the role card just now, read your role card carefully.
3. If you received the business case just now, read the business case carefully.
4. Discuss the facts to find a common position and a rationalisation for it. What will your negotiating position be at the beginning, what are its weak and its strong foundations?
5. Elect a speaker of your group, who will represent you all at the general assemblies. If you want you can also speak as the whole group.
6. Elect a timekeeper for your group, who will be responsible for punctuality.
7. Prepare a short presentation of your group of approx. 5 min. in an introductory round at the General Assembly starting (decide within in your group, which information you want to share with the others and what you would like to hide; you may also add more details to your role).
  - a. No measures are to be presented yet, please limit to arguments and points of view.
  - b. Please also describe as a group what you value about the organisation and which social aspects are particularly close to your heart.
8. *If there is time left*, find a slogan for your group.
9. *If there is time left*, do an internet research on real life examples of your role in organisations in the Social Business to better understand their motives, their positions and their scope of activities.
10. At the General assembly A you will hear introductions of all other groups.

### 6.6.4.2. Preparation for General Assembly B: Decision on Sustainability

| Type      | Name                               | For whom | When                      |
|-----------|------------------------------------|----------|---------------------------|
| Task Card | Preparation for General Assembly B | @all     | Beginning of team phase 1 |

1. Return to your team phase spot - at least one person should stay there for communication with others.
2. Think about your own interests and your common position toward sustainability according to your role.
3. Discuss who might be allies and what common interests you might have. Approach them to forge alliances.
4. Discuss who might be opponents and how to draw them onto your side. Approach them and try to convince them.
5. Visualise your proposal in the form of 5 min. presentation including your most convincing arguments for your case and end with a one sentence summary whether you will vote in favour or against sustainability.
6. Plan a break of at least 10 min. and be on time for the General Assembly.
7. At the General Assembly B you will hear the positions and arguments of all other groups and after a discussion phase decide whether to implement sustainability in the organisation HEART.

### 6.6.4.3. Preparation for General Assembly C: Decision on measures

| Type      | Name                               | For whom | When                      |
|-----------|------------------------------------|----------|---------------------------|
| Task Card | Preparation for General Assembly C | @all     | Beginning of team phase 2 |

1. Return to your team phase spot - at least one person should stay at this spot for communication with others.
2. Brainstorm measures!

Please concentrate on the following themes of the Matrix of the Economy for the Common Good (ECG) for your role (Matrix Development Team, 2017). An explanation of these themes and suggestions for measures are following. You are allowed to think about your own measures for your themes and for other relevant topics for HEART. Also use the learning materials from the course and the internet as resources for a good set.

Please think about two categories of measures - (1) quick wins and (2) most effective ones.

| Role               | Concentrate on these themes of ECG matrix   |
|--------------------|---|
| Management         | B3 Use of funds in relation to social and environmental impacts<br>D4 Customer participation and product transparency |
| Initial Group      | C3 Environmentally friendly behaviour of staff<br>E3 Reduction of environmental impact                                |
| Workers' Council   | C2 Self-determined working arrangements<br>C4 Co-determination and transparency within the organisation               |
| Board of Directors | B1 Ethical position in relation to financial resources<br>E1 Purpose of products and services                         |

|                  |  |
|------------------|--|
|                  | and their effects on society   |
| Board of Clients | D1 Ethical customer relations<br>D4 Customer participation and product transparency                      |
| Members & Donors | E1 Purpose of products and services and their effects on society<br>E3 Reduction of environmental impact |

3. Decide which of them are most likely to strengthen your interests. The measures should also be in line with the organisation's values and tackle its essential impacts on sustainability. Pick one or two measures.
4. Prepare concrete measures at an operational level considering answers to these guiding questions: What will the measure be? How and when will it be introduced (time-line)? Who will be responsible? Will there be any costs and how much? How to assess the impact of the measure? Is it a short term (<1 year), middle term (~5 years) or long term impact (>10 years)? Who will be affected by it?
5. Approach stakeholders affected by your choice of measures and try to make a deal to get them involved into your proposal.
6. Visualise your proposal in the form of 5 min. presentation also including a short explanation of the ECG-themes you were working on. Keep in mind the position of your group and you might also refer to your hidden agenda once more.
7. Plan a break of at least 10 min. and be on time for the General Assembly.
8. At the General Assembly C you will hear the proposals for an implementation process, measures and targets and after a discussion phase decide on a way ahead.

## Worksheet measures

The Game Leader can hand out this template with the task card to help players operationalise the actions. depending on the performance of the students, the template is not handed out

The template can be provided in the following forms:

- Power Point slide
- Printed table in large format (min. DIN A3)
- Banner and Cards: Players receive table as well as cards in different colours for each column. On these they describe their actions. Moderator/Game Leader draws the table on a large banner. In Round 3 of the General Assembly, players pin the cards to the banner while explaining their actions.

| Measure | Measure in detail | Effect on organisation and stakeholder | Time of impact (short, middle, long term) | Indicator of success of the measure | Responsibility | Start date | End date | Investment (Costs, time, human resources...) | Further information |
|---------|-------------------|--|---|-------------------------------------|----------------|------------|----------|--|---------------------|
|         |                   |  |   |                                     |                |            |          |  |                     |
|         |                   |  |   |                                     |                |            |          |  |                     |
|         |                   |  |   |                                     |                |            |          |  |                     |
|         |                   |  |   |                                     |                |            |          |  |                     |

## Individual group information

### Management - Examples for measures

#### B3 Use of funds in relation to social and environmental impacts

##### **Background information ECG:**

This aspect may be of little importance or not at all appropriate for companies/organisations that require little or no fixed or capital assets. If only one element applies, fixed or capital assets, the valuation can be limited to just one. In the case of companies with large plant and equipment assets, there may be considerable potential for environmental improvement. They will be transformed through implementation, new investment with room for improvement and new environmental solutions. If the company has controlled holdings, the investment plan must be considered as consolidated across the group.

Often, facilities are leased. The influence on the landlord about corresponding demands would be the subject of A3.

If the option of sustainable funds is selected, instead of direct investment in projects, the defined exclusion criteria, the specific positive criteria and the forms of possible involvement in investment decisions should be considered.

##### Levels of evaluation



###### Exemplary

Up to 100% of the current redevelopment needs have been met. 100% of new investment leads to a significant improvement in the company's socio-environmental impact. Investment only in ethically sustainable or socio-environmental projects or sustainable funds with clear exclusion criteria as well as specific positive criteria, reduced yield claims and maintaining Common Good-orientated principles

###### Experienced

Up to 60% of the current redevelopment needs have been met. A minimum of 80% of new investment leads to a significant improvement in the company's socio-environmental impact and investment only in ethically sustainable/ socio-environmental projects.

###### Advanced

Up to 30% of the current redevelopment needs have been met. A minimum of 60% of new investment leads to a significant improvement in the company's socio-environmental impact and investment mainly in ethically sustainable/ socio-environmental projects.

###### Getting started

The renovation and potential improvement costs of existing assets have been calculated and an investment in ethically sustainable/ socio-environmental projects has been partly made.

###### Baseline

The company fully complies with all industry, location or commercial licensing of environmental regulations. Conventional investment without speculative financial products.

Figure 1: Levels of evaluation B3 (Matrix Development Team, 2017, p. 34)

## Examples for measures:

### **Measure # B3-1 Renovation**

The organisation's old buildings are being renovated and brought up to the latest ecological standards. X% of the annual profit should be used for the implementation.

Positive impact on: future savings on energy costs.

Negative impact on: high short-term costs.

### **Measure # B3-2 Solar Modules**

The use of solar modules is being examined for new buildings as the renovation of old buildings.

Positive impact on: potential future savings on energy costs.

Negative impact on: potential high short-term cost.

### **Measure # B3-3 Sustainable heating-systems**

Applying local circumstances to the energy plan/keeping up high-tech. Available ecological resources can be efficiently imposed (e.g. already available tele heating/district-heating as a heating source) and be used as efficiently as possible by modern (digital) control.

Positive impact on: future savings on energy costs.

Negative impact on: potential high short-term costs.

---

## **D4 Customer participation and product transparency**

### **Background information ECG:**

Facilitating customer participation involves establishing clearly defined lines of communication and providing the opportunity to communicate with management and senior staff.

A participatory approach to product development is one that takes customers' ideas and suggestions into account. Sustainability-oriented customer groups can be brought on board to assist with the development and dissemination of highly sustainable product innovations.

An exemplary procedure will ensure the disclosure of quantified information on suppliers, material composition and socio-environmental risks, covering the full life cycle of all products.



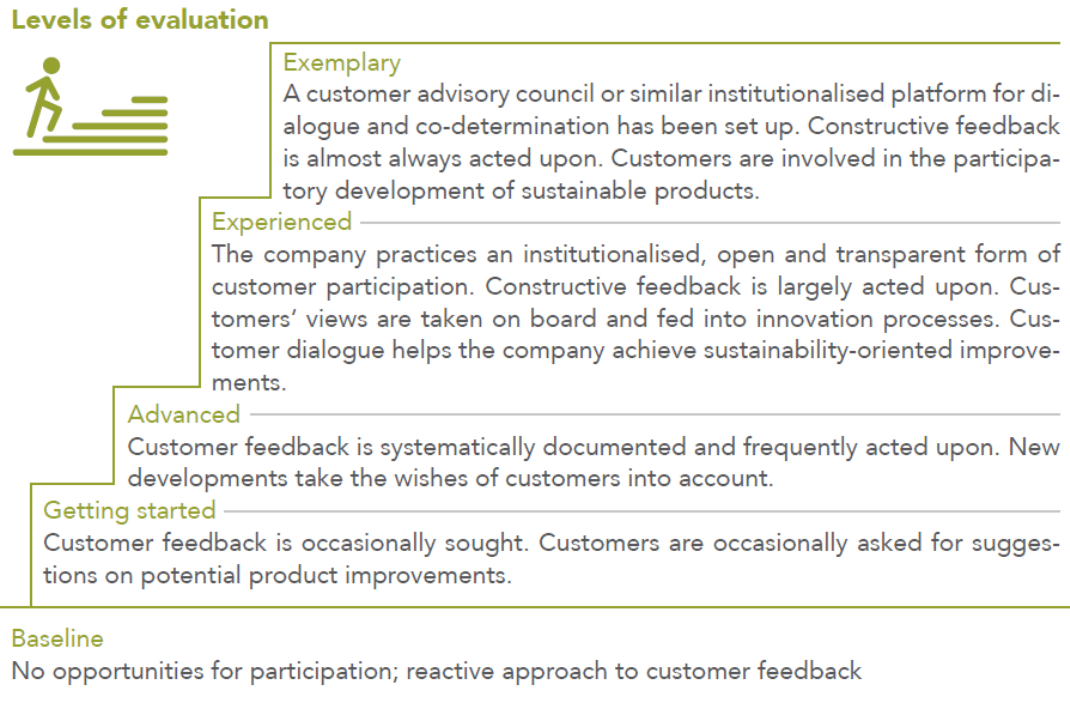


Figure 2: Levels of evaluation D4 (Matrix Development Team, 2017, p. 61)

**Examples for measures:**

**Measure # D4-1 Product transparency**

Transparency of company-products is provided by ecological seals, ratings and certificates. Full disclosure by declaration of the production process and/or ingredients.

Positive impact on: at the same time seals and certificates act as features of quality, therefore this can be a convincing advertisement for product quality as well.

Negative impact on: certificates and ratings can be expensive and raise the expenses of the product.

**Measure #D4-2 Customer advisory board institutionalized**

Customers meet up regularly and co-decide on the products and services provided by the organisation. Clear guidelines are available to define areas and extent of co-decision.

Positive impact on: products and services are tailored to customers' needs.

Negative impact on: decision power of CEO is limited.

## Initial Group - Examples for measures

### C3 Environmentally friendly behaviour of staff

#### **Background information ECG:**

Implementation can happen on many different levels and allows a lot of freedom for creativity and innovation:

- Some form of catering for the staff, such as a fruit basket (especially for small businesses, as they cannot be expected to provide a canteen).
- A vegetarian option in the staff canteen or staff discount vouchers for use in organic restaurants.
- Regular environmental footprint workshops and innovative schemes such as 'green benefits', workshops for creating an ECG Family Balance Sheet.
- Financial incentives to use public transport.
- An official company car policy: < 130 g CO<sub>2</sub>/km, training drivers for fuel-efficiency.
- Using information technology and working from home.
- Preferential treatment for car-pooling.
- Provision of service bicycles and secure, covered bicycle parking.
- Choosing transport options for business, based on environmental considerations.

#### Levels of evaluation



##### Exemplary

Food is predominantly non-meat, groceries are mainly local and seasonal, the proportion of people arriving by car is small in terms of distance, the most environmentally friendly option is used for business travel, environmental awareness is taken into account when recruiting staff.

##### Experienced

The majority of food is non-meat, groceries are mainly local and seasonal, the proportion of people arriving by car is reduced in terms of distance, more environmentally friendly options are considered for business travel, environmental issues are incorporated into training programmes and there are environmental projects within the company.

##### Advanced

There is a clear commitment to sustainable eating habits, there is a consistent and sustainable company transport policy, and environmental issues are selectively incorporated into training programmes.

##### Getting started

The company backs specific environmental practices, e.g. a fruit basket is provided, and the management exemplifies environmental awareness.

##### Baseline

The company shows no apparent contradictions to environmentally sustainable practices.

Figure 3: Levels of evaluation C3 (Matrix Development Team, 2017, p. 45)

## Examples for measures:

### **Measure # C3-1 Ecological mobility**

Application/support of ecological mobility:

- Subsidy of bicycles
- Jointly commuting
- Platform for ecological mobility for Smallington (Town hall activities)

Positive impact on: employers' health/team-building.

Negative impact on: slight expenses.

### **Measure # C3-2 Ecological policy training**

Implementation of seminars to communicate the ecologically elaborated company policy to its employees. (ecological company policy assumed)

Positive impact on: team building.

Negative impact on: minor loss of working hours.

### **Measure # C3-3 Company as a role model**

Company as a role model: Application of waste control (consequently with measures to avoid ecological damage) gives employees a push-start to reflect their own behaviour. e.g. use reusable packaging where possible.

Positive impact on: changing staff behaviour.

Negative impact on: slight expenses.

### **Measure # C3-4 Job ticket initiative**

Cooperation with public transport--> job ticket for public transport

Positive impact on: increasing public transport use.

Negative impact on: state/company pays the public transport for somebody willing to pay themselves.

## E3 Reduction of environmental impact

### Background information ECG:

#### E3-1 Consumption

Absolute environmental impact should be taken into account for the evaluation. The type of industry, current best practice, and existing laws are all taken into account when determining the evaluation level.

An impact is deemed to be significant if it represents one of the company's three largest environmental impacts, or if 50% of the legal threshold has been reached or exceeded.

#### E3 2. CO<sub>2</sub>e-Emission

Absolute environmental impact should be taken into account for the evaluation. The type of industry, current best practice, and existing laws are all taken into account when determining the evaluation level.

An impact is deemed to be significant if it represents one of the company's three largest environmental impacts, or if 50% of the legal threshold has been reached or exceeded.

#### E3 3. Further emissions and pollutants

Absolute environmental impact should be taken into account for the evaluation. The type of industry, current best practice, and existing laws are all taken into account when determining the evaluation level.

An impact is deemed to be significant if it represents one of the company's three largest environmental impacts, or if 50% of the legal threshold has been reached or exceeded.

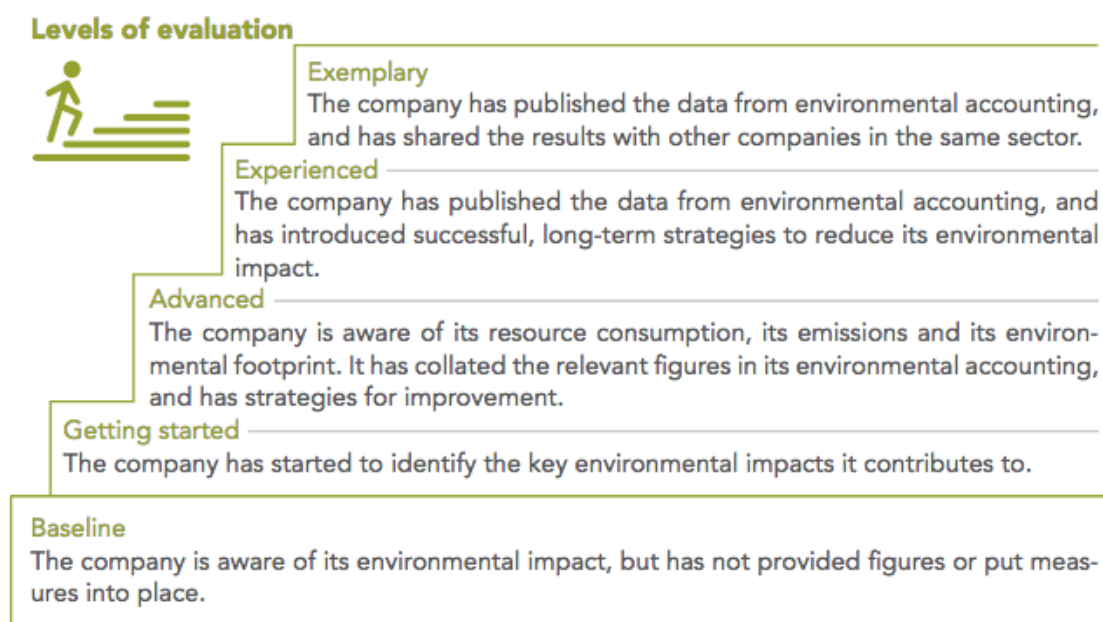


Figure 4: Levels of evaluation E3 (Matrix Development Team, 2017, p. 70)

## Examples for measures:

### **Measure # E3-1 Consumption**

Absolute environmental impact should be taken into account for the evaluation. The type of industry, current best practice, and existing laws are all taken into account when determining the evaluation level.

An impact is deemed to be significant if it represents one of the company's three largest environmental impacts, or if 50% of the legal threshold has been reached or exceeded.

### **Measure # E3 2. CO<sub>2</sub>e-Emission**

Absolute environmental impact should be taken into account for the evaluation. The type of industry, current best practice, and existing laws are all taken into account when determining the evaluation level.

An impact is deemed to be significant if it represents one of the company's three largest environmental impacts, or if 50% of the legal threshold has been reached or exceeded.

### **Measure # E3 3. Further emissions and pollutants**

Absolute environmental impact should be taken into account for the evaluation. The type of industry, current best practice, and existing laws are all taken into account when determining the evaluation level.

An impact is deemed to be significant if it represents one of the company's three largest environmental impacts, or if 50% of the legal threshold has been reached or exceeded.

### **Measure # E3-1 Consumption**

Energy-audit and on-going controlling to check company-emissions continuously.

Applying measures through audit-insights.

Positive impact on: modernisation.

Negative impact on: measures can be expensive.

### **Measure # E3- 2 CO<sub>2</sub>e-Emission**

Switching to renewable energy

Positive impact on: reduce emission, positive impact on climate.

Negative impact on: high initial investment.

**Measure # E3-3 Further emissions and pollutants**

Evaluating overall emissions.

Positive impact on: finding easy ways to reduce the environmental impact.

Negative impact on: high effort for uncertain output.

## Workers' Council - Examples for measures

### C2 Self-determined working arrangements

#### **Background information ECG:**

Unless otherwise stated, all wages are given as gross monthly income. In countries or companies where more than 12 months' worth of salary can be paid, the additional months' earnings must be added to the monthly salary on a pro-rata basis.

Earnings should be understood as a flow of monetary and material assets from the organisation as an outflow before tax deductions, to employees right of disposal as an inflow. All earnings components are considered:

- fixed and variable payments
- allowances
- bonuses
- profit shares
- fringe benefits

The earnings spread includes all employees. A 'living wage' is not to be equated with the minimum wage. It must be determined independently based on the location of the organisation, so that the local cost of living can be considered.

The defined working week (also normal working time) refers to full-time employment and serves as a benchmark for part-time working conditions.

Overtime hours are generally compensated for as time off in lieu. Overtime can be C2 | Structuring of employment contracts | compact balance sheet 43 used to optimise operations if it does not exceed 10% of the working week. If there are no records of overtime or a realistic estimate is not possible, a blanket 4 hours will apply.

The examples set by executives and management should be given particular consideration.

It is possible to limit the extent of self-determination if operational concerns exist (in consultation with staff representatives or a corresponding legitimate body).

'Appropriate approval' means that other conditions can be placed on the working week consensually or democratically by all employees.

### Levels of evaluation



#### Exemplary

A system for self-determining the basic components of an employment relationship has been developed. These components are tailored to individual needs, and set by employees themselves.

#### Experienced

The maximum earnings spread of 1:5, and the maximum working week of 30 hours can be adjusted to the needs of the organisation with appropriate approval by all employees. A mandate is sought when required.

#### Advanced

Measures have been taken to ensure a 'living wage' that is in keeping with the cost of living in the local area. Support is given to measures and further training to establish a sensible treatment of employees in terms of work hours and overtime practices. Employees have the option to choose from various flexible working arrangements.

#### Getting started

The distribution of workload, work performance, work hours, types of working arrangements, and pay are regularly examined and discussed.

#### Baseline

The legal minimum requirements for a contractually regulated employment relationship are met.

Figure 5: Levels of evaluation C2 (Matrix Development Team, 2017, p. 42)

### Examples for measures:

#### **Measure # C2-1 Improved employee contracts**

Implementation of wage agreements and indefinite employment contracts.

Positive impact on: provides clearness and transparency in the wage policies.

Negative impact on: loss of flexibility to react on crisis.

#### **Measure # C2-2 Alternative work models**

Consideration of alternative employment contract/work models, i.e. self-organized workhours, top sharing, sabbaticals.

Positive impact on: self-determination/efficacy.

Negative impact on: unknown risk of failure.



### **Measure # C2-3 Self-organized work**

Self-organized work hours -> work flexible analysis

Positive impact on: work-live balance.

Negative impact on: not covered needed time slots.

### **Measure # C2-4 Top sharing**

Top sharing - splitting management position between 2 employees.

Positive impact on: multiple perspectives within one role.

Negative impact on: multiple contact persons for one topic; multiple directions given to the employees.

### **Measure # C2-5 Sabbaticals**

Sabbaticals - possibility of taking a long term work break.

Positive impact on: gives the chance to recharge and develop in the way employees want.

Negative impact on: limited term replacements needed.

---

## **C4 Co-determination and transparency within the organisation**

### **Background information ECG:**

- Essential decisions include setting the budget, recruitment/dismissals and fundamental long-term policies. This also applies to decisions that significantly affect the majority of employees or their daily routines.
- 'Consensual' applies to various methods of decision-making, that seek the highest possible consensus among all parties involved, e.g. 'consent moderation' in sociocracy or 'systemic consensus' (Systemic Consensus Principle).
- Companies with ten or fewer employees can forego the legitimation process for managers, but not their evaluation.

### Levels of evaluation



#### Exemplary

All essential decisions are made, where possible, by employee consensus or democratic decision-making, including the selection and de-selection of managers.

All essential and critical data are easily accessible and understandable for all employees.

There is a culture of transparency and employee participation.

#### Experienced

Some decisions are made, where possible, by employee consensus or democratic decision making, including the selection and de-selection of managers.

Most of the critical data are prepared in a transparent, easily accessible, and understandable manner. This has been in practice for several years.

#### Advanced

Employees are consulted on, and participate (= have a voice) in essential topics and decisions, including the appointment of managers.

Some critical data are prepared in a transparent, easily accessible, and understandable manner.

#### Getting started

There are discussions around transparency and employee participation. There are concrete plans for a greater degree of co-determination.

#### Baseline

The scope of transparency and the rights of employee co-determination meet the legal requirements.

Figure 6: Levels of evaluation C4 (Matrix Development Team, 2017, p. 48)

### Examples for measures:

#### **Measure # C4-1 Economical transparency**

Giving (internally) full disclosure about economic motives, quarterly figures, company facts/figures.

Positive impact on: involvement potentially boosts motivation of employees.

Negative impact on: potentially abuse of companies insights is possible.

#### **Measure # C4-2 Leadership satisfaction**

Survey to reflect employee's opinion about reachability of superiors, leadership culture and collaboration. Apply measures if necessary.

Positive impact on: involvement potentially boosts motivation of employee, results can ameliorate collaboration, impetus organisational development.

Negative impact on: can potentially provoke conflict between superior and employee.

#### **Measure # C4-3 Feedback email box**

Providing channels of communication, for instance by providing an Email address for work-related suggestions or complaints.

Positive impact on: giving the chance to share about challenges; possibility to learn more about work environment.

Negative impact on: responsible need to invest work-hours to process mails.

#### **Measure # C4-4 Establishing labour union**

Allowing an internal company labour union.

Positive impact on: improve working conditions.

Negative impact on: potential of conflict.

#### **Measure # C4-5 Management communication**

Newsletter for employees to understand the decisions of the management or: Monthly meeting.

Positive impact on: important information are shared on regular basis.

Negative impact on: important information could be hidden between unnecessary content.

## Board of Directors - Examples for measures

### B1 Ethical position in relation to financial resources

#### **Background information ECG:**

A high equity ratio is important for investment in fixed assets and to safeguard against business risks, such as a drop in sales, seasonal fluctuations, adverse weather conditions, reliance on specific resources and skills etc. For business models with secure regular income, no assets and no pre-financing requirements, this aspect may be less important.

The need for more borrowing makes solidarity financing even more important. Conventional loans often have additional financial risks, e.g. high interest rates, short repayment or maturity periods, currency risks (foreign currency loans), repayment vehicles with their own risky amortisation value, interest rate swaps and similar. Indeterminate effects include speculative factors and are therefore risks being avoided.

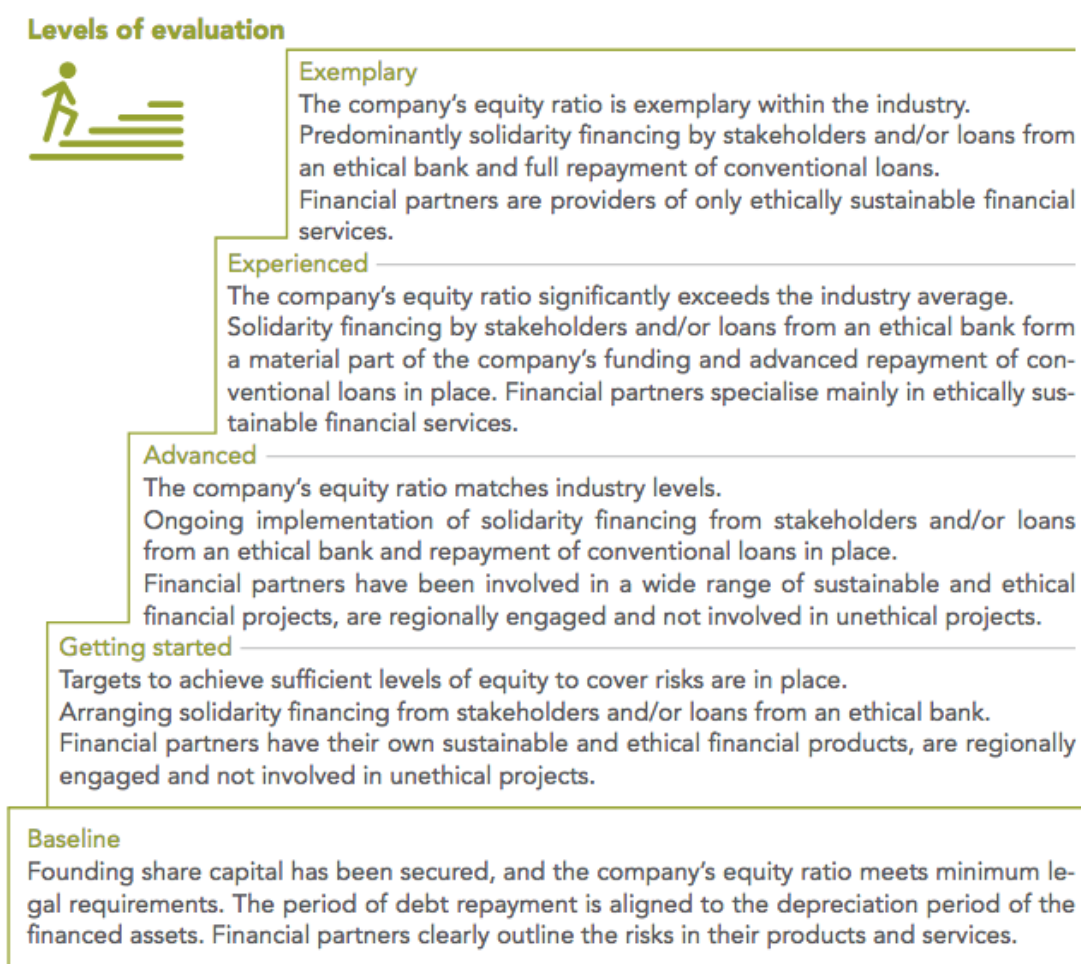


Figure 7: Levels of evaluation B1 (Matrix Development Team, 2017, p. 28)

## Examples for measures:

### **Measure # B1-1 Equity ratio**

The aim is to achieve an equity ratio of 40% to ensure the independence of the company. The financial strategy is implemented operationally through risk management and ongoing controlling.

Positive impact on: higher independence and resilience of the company.

Negative impact on: low liquidity for investments.

### **Measure # B1-2 Debt use capital**

For debt use capital, public benefit-oriented financial institutions are prioritised.

Positive impact on: increased cash flow, helps reach goals.

Negative impact on: possibly more expensive/higher interest rates.

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## E1 Meaning and social effect of products and services

### **Background information ECG:**

“When evaluating the company’s products and services, they should be classified according to whether they satisfy the basic needs for a simple or good life, or whether they are a dispensable luxury. According to M. Max-Neef and M. Rosenberg, the following represent the nine fundamental human needs:

1. Subsistence/health/well-being
2. Protection/safety
3. Affection/love
4. Understanding/empathy
5. Participation/comfort
6. Leisure/recreation
7. Creation
8. Identity
9. Freedom/autonomy” (Matrix Development Team, 2017, p. 64)

“In addition, the type of benefit provided to the customer should also be classified (according to Max-Neef). Products and services with multiple benefits are rated highest, followed by those that provide a singular benefit, those that provide an inhibiting benefit, and lastly, those that provide a pseudo benefit. For negative benefits, see under Negative aspect below.

- a) Multiple benefits: the good or service fulfils multiple positive benefits.
- b) Singular benefits: the good or service fulfils a single benefit only, e.g. a sports event may only have the benefit of being a leisure activity.
- c) Inhibiting benefits: TV shows, for example, satisfy the need for recreation, but can inhibit creativity and inventiveness.
- d) Pseudo benefits: in mechanistic medicine, (e.g. ‘A pill for every disease’), it is often not the cause of the problem that is addressed; instead, only the symptoms are relieved, which at worst can lead to symptom shifting.
- e) Negative benefits: these are products and services that can make it more difficult to satisfy fundamental needs; for example, nuclear power stations, weapons, slot machines or violent video games. Social challenges: see UN Sustainable Development Goals under further online information.” (Matrix Development Team, 2017, p. 65)

### Levels of evaluation



#### Exemplary

The majority of products and services solve important social problems in accordance with UN Sustainable Development Goals. Innovative, visionary approaches to the biggest challenges facing humanity have been implemented.

#### Experienced

The majority of products and services promote the development of communities or the diversity of the biosphere. People’s knowledge and attitudes (including those of non-customers) have been changed by the company’s activities; there is an awareness of how to meet social challenges, e.g. repairing rather than buying new.

#### Advanced

The majority of products and services promote the healthy development of people. Information about social opportunities (and solutions) reach people other than one’s own customers.

#### Getting started

Products and services fulfil most basic needs for a satisfactory or good life. There is a clear understanding of the serious social and environmental problems within the industry

#### Baseline

All products and services promote status over meeting basic needs. There is no clear understanding of the social impact of products and services.

Figure 8: Levels of evaluation E1 (Matrix Development Team, 2017, p. 64)

## Examples for measures:

### **Measure # E1-1 Charitable services**

Providing charitable services applicable to the company's skill set/products, i.e., giving shelter to refugees, donating food supply or education.

Positive impact on: having a positive social impact.

Negative impact on: distraction from main goals.

### **Measure # E1-2 Publicity for a greater purpose**

Use the company's publicity for a greater purpose than commercial, i.e., donation campaign.

Positive impact on: supporting a good cause.

Negative impact on: reduce focus on profit.

## Board of Clients - Examples for measures

### D1 Ethical customer relations

#### **Background information ECG:**

The levels are evaluated based on the three areas:

- Advertising measures: informative website, word-of-mouth marketing resulting from positive customer experiences. Exemplary advertising is informative, enlightening, authentic and respectful. The initiative lies with the customers, meaning they receive no unsolicited advertising (permission marketing).
- Sales process: The benefit to the customer takes precedence over the benefit to the company. The company therefore only sells products and services that benefit the customer. Products and services offered by competing companies may also be recommended if the company's own products and services do not meet the needs of the customer. The remuneration of employees is independent of sales. Employees are not bound by internal targets or subjected to sales pressure. Care is taken to ensure that customer data is protected, meaning it is only used internally and is not passed on to other organisations unless this is necessary for service provision.
- Customer service: easy access to customer service, pragmatic solutions, such as the straightforward exchange of products and reimbursement of the purchase price, fundamental customer freedom, meaning customers are not bound to the company. Existing customers benefit from the same advantages as new customers.

Start-ups as a special case: In the case of start-ups, more active forms of advertising are neutral from an evaluation perspective if they are appropriate, informative and factual.

Disadvantaged customer groups include people experiencing socio-economic deprivation, people with special needs, people with mental, sensory or physical impairment, people from ethnic minority or faith backgrounds, or because of gender or sexuality.

B2B: The conditions and services available to small and medium-sized enterprises, local companies and companies that are especially committed to the Common Good are equal to those available to large companies.



### Levels of evaluation



#### Exemplary

A customer relations approach that respects customers as equals forms an integral part of the company's market positioning strategy. Innovative solutions to ensuring respectful communication and accessibility are implemented throughout the company.

#### Experienced

In addition to ethical guidelines on sales, all points of contact with customers are regularly reviewed and improved with the aim of better fulfilling customer needs and cultivating a spirit of partnership. Accessibility is broadly implemented throughout the company's activities.

#### Advanced

Clear and precise ethical guidelines on customer acquisition and customer care and solutions for disadvantaged customer groups are implemented on a mandatory basis.

#### Getting started

Active efforts are made to address genuine customer needs. This applies to the range of products and services offered as well as to customer acquisition, customer care and the identification of disadvantaged customer groups.

#### Baseline

The company adheres to the rules of fair competition, communicates honestly with customers and refrains from comparative advertising.

Figure 9: Levels of evaluation D1 (Matrix Development Team, 2017, p. 51)

### Examples for measures:

#### **Measure # D1-1 Accessible language**

Application of accessible language for all public information.

Positive impact on: inclusion of people with cognitive disabilities.

Negative impact on: increase time needed for writing materials.

#### **Measure # D1-2 Accessible infrastructure**

Application of accessible infrastructure for all disabilities.

- Blind leading measures
- Wheelchair accessibility

Positive impact on: inclusion of people with disabilities.

Negative impact on: costs, applying building operations can be very expensive.

## D4 Customer participation and product transparency

### Background information ECG:

Facilitating customer participation involves establishing clearly defined lines of communication and providing the opportunity to communicate with management and senior staff.

A participatory approach to product development is one that takes customers' ideas and suggestions into account. Sustainability-oriented customer groups can be brought on board to assist with the development and dissemination of highly sustainable product innovations.

An exemplary procedure will ensure the disclosure of quantified information on suppliers, material composition and socio-environmental risks, covering the full life cycle of all products.

### Levels of evaluation



#### Exemplary

A customer advisory council or similar institutionalised platform for dialogue and co-determination has been set up. Constructive feedback is almost always acted upon. Customers are involved in the participatory development of sustainable products and services. All available information on products is fully disclosed and a percentage breakdown of all price components is provided.

#### Experienced

The company practices an institutionalised, open and transparent form of customer participation. Constructive feedback is largely acted upon. Customers are extensively informed about the material composition of products and the risks they may be exposed to as consumers. The origin of products and processes and breakdowns of price components are generally disclosed to the public.

#### Advanced

Customer feedback and requests are systematically documented and frequently acted upon. Information on the stages of the value chain is partly made available to the public. Breakdowns of price components are published to some extent.

#### Getting started

Customer feedback is occasionally sought. To an extent, it is possible for staff within the company to gain an overview of the value chain. A concept for the publication of price components has been developed.

#### Baseline

No opportunities for participation; reactive approach to customer feedback; compliance with statutory declaration requirements.

Figure 10: Levels of evaluation D4 (Matrix Development Team, 2017, p. 61)

### Examples for measures:

#### Measure # D4-1 Declaration of the production process

Transparency of company-products is provided by ecological seals, ratings and certificates. Full disclosure by declaration of the production process and/or ingredients.

Positive impact on: at the same time seals and certificates act as features of quality, therefore this can be a convincing advertisement for product quality as well.

Negative impact on: certificates and ratings can be expensive and raise the expenses of the product.

#### **Measure #D4-2 Customer advisory board**

Customer advisory board institutionalized. Customers meet up regularly and co-decide on the products and services provided by the organisation. Clear guidelines are available to define areas and extent of co-decision

Positive impact on: products and services are tailored to customers' needs.

Negative impact on: decision power of CEO is limited.

## Members & Donors - Examples for measures

### E1 Purpose of products and services and their effects on society

#### **Background information ECG:**

“When evaluating the company’s products and services, they should be classified according to whether they satisfy the basic needs for a simple or good life, or whether they are a dispensable luxury. According to M. Max-Neef and M. Rosenberg, the following represent the nine fundamental human needs:

1. Subsistence/health/well-being
2. Protection/safety
3. Affection/love
4. Understanding/empathy
5. Participation/comfort
6. Leisure/recreation
7. Creation
8. Identity
9. Freedom/autonomy” (Matrix Development Team, 2017, p. 64)

“In addition, the type of benefit provided to the customer should also be classified (according to Max-Neef). Products and services with multiple benefits are rated highest, followed by those that provide a singular benefit, those that provide an inhibiting benefit, and lastly, those that provide a pseudo benefit. For negative benefits, see under Negative aspect below.

- a) Multiple benefits: the good or service fulfils multiple positive benefits.
- b) Singular benefits: the good or service fulfils a single benefit only, e.g. a sports event may only have the benefit of being a leisure activity.
- c) Inhibiting benefits: TV shows, for example, satisfy the need for recreation, but can inhibit creativity and inventiveness.
- d) Pseudo benefits: in mechanistic medicine, for eg (‘A pill for every disease’), it is often not the cause of the problem that is addressed; instead, only the symptoms are relieved, which at worst can lead to symptom shifting.
- e) Negative benefits: these are products and services that can make it more difficult to satisfy fundamental needs; for example, nuclear power stations, weapons, slot machines or violent video games. Social challenges: see UN Sustainable Development Goals under further online information.” (Matrix Development Team, 2017, p. 65)

### Levels of evaluation



**Exemplary**  
 The majority of products and services solve important social problems in accordance with UN Sustainable Development Goals. Innovative, visionary approaches to the biggest challenges facing humanity have been implemented.

**Experienced**  
 The majority of products and services promote the development of communities or the diversity of the biosphere. People's knowledge and attitudes (including those of non-customers) have been changed by the company's activities; there is an awareness of how to meet social challenges, e.g. repairing rather than buying new.

**Advanced**  
 The majority of products and services promote the healthy development of people. Information about social opportunities (and solutions) reach people other than one's own customers.

**Getting started**  
 Products and services fulfil most basic needs for a satisfactory or good life. There is a clear understanding of the serious social and environmental problems within the industry

**Baseline**  
 All products and services promote status over meeting basic needs. There is no clear understanding of the social impact of products and services.

Figure 11: Levels of evaluation E1 (Matrix Development Team, 2017, p. 64)

### Examples for measures:

#### **Measure # E1-1 Publicity for a greater purpose**

Providing charitable services applicable to the company's skill set/products, i.e., giving shelter to refugees, donating food supply or education.

Positive impact on: having a positive social impact.

Negative impact on: distraction from main goals.

#### **Measure # E1-2 Charitable services**

Use the company's publicity for a greater purpose than commercial, i.e., donation campaign.

Positive impact on: supporting a good cause.

Negative impact on: reduce focus on profit.

## E3 Reduction of environmental impact

### Background information ECG:

#### E3-1 Consumption

Absolute environmental impact should be taken into account for the evaluation. The type of industry, current best practice, and existing laws are all taken into account when determining the evaluation level.

An impact is deemed to be significant if it represents one of the company's three largest environmental impacts, or if 50% of the legal threshold has been reached or exceeded.

#### E3 2. CO<sub>2</sub>e-Emission

Absolute environmental impact should be taken into account for the evaluation. The type of industry, current best practice, and existing laws are all taken into account when determining the evaluation level.

An impact is deemed to be significant if it represents one of the company's three largest environmental impacts, or if 50% of the legal threshold has been reached or exceeded.

#### E3 3. Further emissions and pollutants

Absolute environmental impact should be taken into account for the evaluation. The type of industry, current best practice, and existing laws are all taken into account when determining the evaluation level.

An impact is deemed to be significant if it represents one of the company's three largest environmental impacts, or if 50% of the legal threshold has been reached or exceeded.

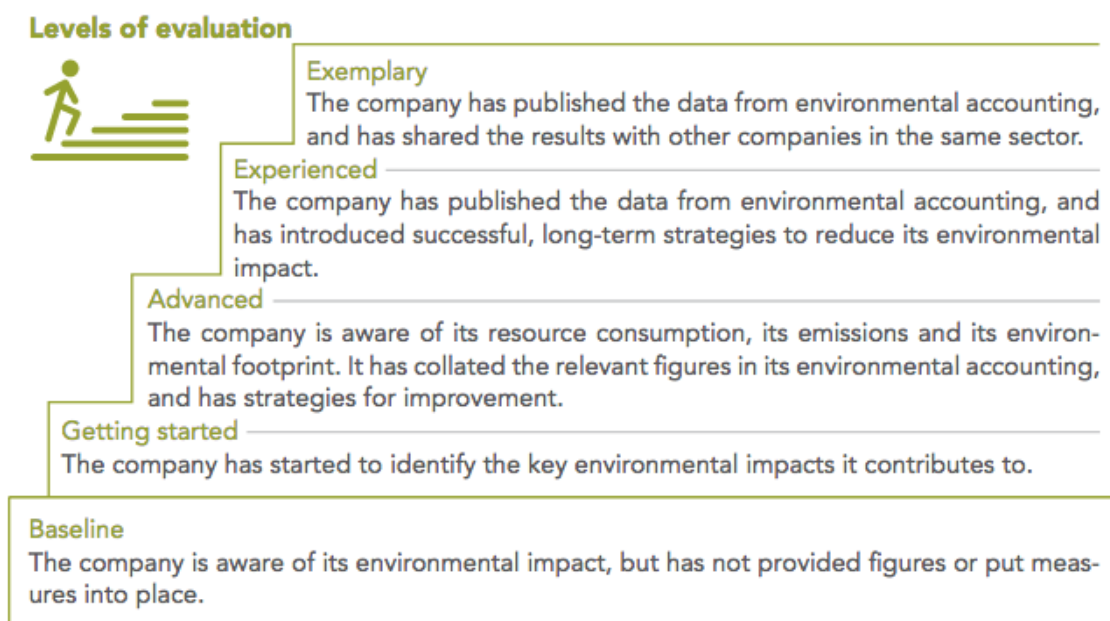


Figure 12: Levels of evaluation E3 (Matrix Development Team, 2017, p. 70)

## Examples for measures:

### **Measure # E3-1 Consumption**

Energy-audit and on-going controlling to check company-emissions continuously. Applying measures through audit-insights.

Positive impact on: modernisation, strengthen awareness for energy consumption.

Negative impact on: measures can be expensive.

### **Measure # E3- 2 CO<sub>2</sub>e-Emission**

Switching to renewable energy.

Positive impact on: reduce emission, positive impact on climate.

Negative impact on: high initial investment.

### **Measure # E3-3 Further emissions and pollutants**

Evaluating overall emissions.

Positive impact on: finding easy ways to reduce the environmental impact.

Negative impact on: high effort for uncertain output.

#### 6.6.5. Event cards

Event cards are intervention into the planned procedure to simulate day-to-day business. They should bring the element of uncertainty into the game and remind the students that the organisation is not put on hold while they have time to explore and implement sustainability, but all business activities go on as usual. Shifts in public opinion or new competitors need a reaction from the organisation, as failing cars can be seen as a window of opportunity to switch to more sustainable options.

**Be aware as a Game Leader, in which phase which group gets the event card.**



### 6.6.5.1. FFF intervention (FFF - Fridays for future)

| Type       | Name      | For whom     | When                      |
|------------|-----------|--------------|---------------------------|
| Event Card | Email FFF | @ Management | Middle of team<br>phase 1 |

You receive an email from Fridays for Future with a video attached. They urge you to take the climate crises more seriously and undertake a transition with your organisation.

Being in the centre of attention by FFF might have a big impact on your organisation.

Action:

You must show the video at the next General Assembly.

Also prepare a short statement on the planned reaction of the management:

- Will you ask the General Assembly on how to move on?
- Will you already propose measures or further activities (e.g. meeting with FFF)?

### 6.6.5.2. Car broke down

| Type       | Name           | For whom     | When                   | If   |
|------------|----------------|--------------|------------------------|--|
| Event Card | Car broke down | @ Management | Middle of team phase 1 | Groups are coming up with very quick solutions |

The employees of the assisted individual living usually take one of the five pool-cars to get to the clients. One of the cars has broken down. You had to organize a rental car.

The car mechanic told you that the transmission gearing has to be replaced and the repair would cost more than the current value of the car. So a new purchase of a car is inevitable.

#### Action:

- Decide in your group how this event can be used for your advantage!
- Whom will you inform first about it? Who later and why?
- Will you also propose an electric transporter caddy?

The car mechanic told you:

|   | VW up!             | Renault Zoe                     |
|---|--------------------|---------------------------------|
| Fuel type   | Gasoline, Super 95 | Electric                        |
| Purchase price  | 14,800 €           | 29,990 €                        |
| state environmental bonus for the purchase of electric cars |                    | -10,000 €                       |
| Annual drive costs for 100 km                               | 9.74 €             | 6.35 €                          |
| Annual maintenance costs                                    | 440 €              | 220 €                           |
| Tax per year  | 46 €               | Tax free until the next 3 years |
| Insurance   | 990 €              | 1,680 €                         |
| Annual driving power  | 20,000 km          | 20,000 km                       |

### 6.6.5.3. Sustainability law

| Type       | Name               | For whom | When                   | If   |
|------------|--------------------|----------|------------------------|--|
| Event Card | Sustainability law | @all     | Beginning team phase 2 | Only if group chose “No” to sustainability |

The progressive government of your country has passed a law that all organisations must compile a yearly sustainability report beginning this year. All legal entities that receive subsidies must reduce their greenhouse gas emissions by 15% each year, otherwise the subsidies will be cut by 20%.

Action:

- Decide in your group how this event will impact the opinion of your group.
- What is your group’s contribution proposal to reach this challenging aim?
- Whose position do you need to support now? Whose must be changed?

#### 6.6.5.4. Competitor

| Type       | Name       | For whom | When                   | If  |
|------------|------------|----------|------------------------|---|
| Event Card | Green Home | @all     | Middle of Team phase 2 | If Game Leader thinks the solutions are to superficial / groups are coming up with very quick solutions |

A new competitor “Green Home” has announced plans to open a place of business in Smalington. They are specialised in green care, activities between humans, animals and nature that are known to enhance health promotion, mental stability and wellbeing.

It is rumoured that some clients are already contemplating leaving HEART and taking the new offer. There are also a lot of job offerings for social and care workers open at the moment, who could attract employees of HEART.

Action:

- Decide in your group how this event will impact the opinion of your group.
- What is your group’s contribution proposal to keep your clients?
- Whose position do you need to support now? Whose must be changed?

### 6.6.6. Group division notes

This table should be cut into small slips of paper to be drawn randomly by each student. Left column indicates how many rows need to be cut.

|               |            |               |                  |                    |                  |                  |
|---------------|------------|---------------|------------------|--------------------|------------------|------------------|
| # of students |            |               |                  |                    |                  |                  |
|               | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |
|               | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |
| 12-18         | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |
| 19-24         | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |
| 25-30         | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |
| 31-36         | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |
| 37-42         | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |
| 43-48         | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |
| 49-54         | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |
| 55-60         | Management | Initial Group | Workers' Council | Board of Directors | Board of Clients | Members & Donors |

### 6.6.7. Follow up (Feedback self-study phase)

As a proof of achievement, it is advisable that the students reflect on the Simulation Game in a seminar paper. The following questions could be discussed:

- Role analysis: What opportunities and challenges did your own role offer? How did you deal with them? How successful was the strategy chosen to assert one's own interests? How should the result be evaluated? What would you do differently now?
- Game analysis: Which role emerged as the winner of the game and why? What lessons do you draw from this for your professional context?
- Further topics: Imagine you have observed the process, what recommendations would you give to colleagues, who want to introduce sustainability in their social organisation.

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