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**SOMEONE
SOMEWHERE**

Streamlining Impact Assessment: Matrix Evaluation Tool and Community Profiles



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EXECUTIVE SUMMARY

In 2020, Someone Somewhere created a tool to assess quality of life in their artisan partner communities. Currently, SS utilizes a quality-of-life questionnaire as its primary diagnostic tool when determining an artisan community's position on the quality-of-life (QOL) matrix, which is used as a guide to measure and improve artisan wellbeing at different development levels. Artisan responses to questionnaire content correlate with indicators on the QOL matrix, which determine an artisans' position on a scale measuring economic wellbeing, self-perceived wellbeing, labor conditions, gender inclusivity, and cultural preservation. Placement on the matrix determines the interventions SS implements in a given community to scale its impact on artisan wellbeing by improving the artisans' development indicators.

SS's original questionnaire content had not yet been validated when we began this project, so the accuracy of diagnostic tools was not yet supported by qualitative evidence. The present document includes:

1. A description of the elements of the revised quality-of-life assessment, with guidelines on the scoring and application of the questionnaire and focus group template.
2. A revised quality-of-life assessment tool, including the quality-of-life questionnaire, a template for supplemental focus group discussions, and the quality-of-life matrix. Each element of the tool uses indicators of wellbeing across each category that have been validated according to existing literature on quality-of-life assessment and the methodology adopted by other institutions seeking to measure quality of life.
3. A template for reporting
4. A description of the validity of each indicator, supporting their general relevance as measurements of quality of life.

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Components of Quality-of-Life Assessment Tool

Deliverable 1: Expanded Quality of Life Assessment Tool

Results from focus groups emphasized the nuances in community-specific needs, indicators of wellbeing, and goals for future development. This highlighted the limitations of a standardized QOL assessment tool in accurately identifying and evaluating community-specific indicators of wellbeing.

These findings led to an expanded diagnostic tool (See deliverable 1) that includes:

- A. **A revised diagnostic questionnaire, and a literature review supporting the use of each indicator as a measurement for quality of life.** The questionnaire includes questions based on validated guidelines for QOL assessment and indicators of wellbeing as identified by artisans themselves during community visits.
- B. **The revised and expanded QOL matrix,** with an updated scoring system to reflect the relative weight of qualitative (i.e., questions on perceived barriers to additional education or training) and quantitative indicators (i.e., questions that quantify total educational attainment) to allow SS to assess the impact of its partnerships over time and identify areas where additional impact efforts can be channeled.
- C. **A supplementary list of focus group questions to be administered alongside QOL diagnostic questionnaires yearly.** This will allow SS to keep a standardized assessment tool, while supplementing quantitative indicators of QOL with qualitative data to account for community-specific needs, goals, and feedback as they relate to relevant matrix categories.

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Guidelines for Tool Application

I. Timeline of Application: Recommended Methodology

The QOL Assessment is intended to be administered as follows:

1. Questionnaire Administration.

- QOL questionnaires should be administered in a one-on-one setting using a representative sample from each artisan community, with a staff member verbally posing the questions and answer choices to the respondent. Input from artisan community members emphasized the importance of in-person survey administration, and we recommend that each community receive an annual visit devoted to QOL assessment to ensure that there is sufficient time to collect data from a large enough sample.

2. Focus Group Discussions

- During an in-person field visit, focus groups should be conducted, if possible, with a similarly sized sample as the questionnaire. During discussions, facilitators should take notes on common themes that appear in answers to each question. Guidelines for focus group facilitation can be found in Appendix 2.

II. Scoring Matrix Results

The Quality-of-Life Matrix outlines quality of life using nine different categories. Each of the nine categories is associated with a set of indicators that suggest a level of development, which are measured by a series of questions in the questionnaire. For example: the elements that make up the indicator of **financial inclusion**, which have been validated as defensible measurements of financial inclusion through our literature review on quality-of-life assessment guidelines, include:

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- Access to financial products (bank account, credit, microloans, savings funds and loans) (1.3),
- Perceived barriers to bank access (1.3.2),
- Perceived financial security, (1.3.3),
- Participation in informal savings tactics (1.3.4)

These indicators of quality of life at each stage of community development are measured using the QOL questionnaire, and answers to each multiple-choice questionnaire question are scored on a four-point scale. Here, each answer choice is associated with a different point value that indicates one of four levels of development:

1. 'Entering'=0.25
2. 'Developing'=0.5

Using the example of financial inclusion, the indicators measured by the questionnaire are scored as follows:

1.3	Financial inclusion	<p>Criteria to be evaluated as red: (point value .25)</p> <ul style="list-style-type: none"> -Currently holds no financial products (0 boxes checked, 1.3.1) (.25) -Very difficult to access formal banking services ('D', 1.3.2) (.25) -Perceived financial security is low ('D', 1.3.3) (.25) -Does not participate in a community savings account ('No', 1.3.4) (.5) 	<p>Criteria to be evaluated as orange: (point value .5)</p> <ul style="list-style-type: none"> -Currently holds one financial product (1 boxes checked, 1.3.1) (.5) -Somewhat difficult to access formal banking services ('C', 1.3.2) (.5) -Perceived financial security is low ('C', 1.3.3) (.5) -Does not participate in a community savings account ('No', 1.3.4) (.5) 	<p>Criteria to be evaluated as yellow: (point value .75)</p> <ul style="list-style-type: none"> -Currently holds two financial products (2 boxes checked, 1.3.1) (.75) -Somewhat easy to access formal banking services ('B', 1.3.2) (.75) -Perceived financial security is high ('B', 1.3.3) (.75) -Participates in a community savings account ('Yes', 1.3.4) (1) 	<p>Criteria to be evaluated as green: (point value 1)</p> <ul style="list-style-type: none"> -Currently holds 3+ financial products (3+ boxes checked, 1.3.1) (1) -Very easy to access formal banking services ('A', 1.3.2) (1) -Perceived financial security is high ('A', 1.3.3) (1) -Participates in a community savings account ('Yes', 1.3.4) (1)
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Using this scoring system, each answer option is associated with a given level of development. The point values for each question are then added up to achieve the total score for each indicator. Indicator scores for each element of a category are averaged to achieve a total score for each category. Using the category of economic wellbeing as an example, the average between the financial inclusion score, the poverty score, and the annual income score are determined to generate a representative numerical interpretation of a community's economic wellbeing.

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Incorporating Focus Group Data into Scores

Some questionnaire questions may not be representative of a community's needs or interests, making it difficult for scores from the tool to be compared across communities. For this reason, it is necessary that some questionnaire questions be redacted, adjusted, or weighted differently to represent community interests.

We recommend that data from focus groups be collected and categorized into a matrix format, which will allow qualitative information to be consolidated based on themes yielded from the responses. **This will act as a matrix for focus group data alone.**

- For elements of indicators that are exclusively measured by focus group data—things like descriptions of barriers to healthcare, education, or banking institutions—‘Themes’, rather than questionnaire responses, will be correlated with the development levels. These themes will be scored using the same point system as described above.
- Some focus group questions are meant to supplement questionnaire questions in order to determine the relevance of the different elements of an indicator. This refers to things like the type of savings methods a community prefers, or frequency of training received based on a given community's craft specialty. In these cases, ‘themes’ can be used to determine whether a certain element of an indicator should be redacted or weighted differently to reflect a community's circumstances and preferences.

The intention here is to avoid misrepresenting a community's quality of life by scoring them based on indicators of wellbeing that might not be an accurate measurement of their development or satisfaction.

In the event that focus group findings indicate that a question needs to be redacted, the group's answers to that question on the questionnaire will not be included in their

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final scores, and the other elements of each indicator will be re-weighted to ensure that the indicator is still scored on a four point scale.

Guidelines for Reporting Focus Group Results

To contextualize each collective's Quality-of-Life score, a community profile intends to organize the sentiments and statements made by artisans in focus groups according to their relevant QOL indicator or category. Reviewing focus group data provides Someone Somewhere with the opportunity to identify the relevance of matrix indicators to each collective's Quality of Life. The following approach to organizing and providing evidence for each indicator's relevance, or lack thereof, provides a preliminary example of how to include artisans' qualitative input into their QOL evaluations.

We understand that a concern of Someone Somewhere's impact team may be that sometimes, communities are not aware of the relevance that certain indicators could have in evaluating their quality of life; artisans may disagree with the standards Someone Somewhere uses as representative of their development. Perhaps the company would like to score artisans according to a certain indicator despite artisans' feedback. Of course, there is a need to balance artisans' standards for QOL with what Someone Somewhere has envisioned in their matrix, especially since these standards have resulted from extensive research and years of experience in the field. For this reason, the matrix maintains its original categories to measure in each community. However, we ensure a more flexible QOL evaluation by allowing focus group data to inform the scoring of select development indicators, or even the creation of new, more representative indicators.

It is our recommendation that if Someone Somewhere does choose to evaluate artisans according to an indicator that artisans express disinterest in, the company should be prepared to eventually offer tangible solutions through support from

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specialized organizations. If that proves impossible or impractical, Someone Somewhere should maintain transparency in their QOL evaluations with artisans by informing them of their options for achieving solid scores in said indicators as well as the possible risks and benefits of achieving them.

Methodology for Analyzing Focus Group Results:

1. Collect qualitative data from focus group discussion leaders and note-takers.
2. Identify focus group data that supports the indicators' relevance in that community's matrix/scoring.

Example Format for Results Reporting:

- I. Category
 - A. Topic
 - B. Development Indicators
- II. Qualitative evidence for each indicator [quotes from focus groups and general field notes]
- III. Conclusion
 - A. Findings from focus group discussions as they relate to the matrix category and indicators. This allows SS to gain a more in-depth understanding of community-specific perceptions of quality of life that may not be captured by matrix scores alone.
- IV. Demonstrated Needs
- V. Interventions/Action Items SS Recommends

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Recommendations for Adjustments to Tool

We recommend that Someone Somewhere adopt an IDEA test methodology to further increase the validity of its QOL assessment tool when applied to different communities. The IDEA methodology follows the logic that community member insight can be used as a filter to identify which development indicators are most relevant measurement, and adjusted assessment would take place using the following methodology:

- I. Creation of an interest inventory to be administered to artisan communities. Inventories would reflect the importance of each quality-of-life category by asking respondents to score the relative importance of each category on a scale of 1-4.
- II. Responses to the interest inventory would act as a filter for the quality-of-life questionnaire; scores for each category would be weighted based on the communities' indicated interests.
- III. The aforementioned methodology would allow SS to maintain its goal of standardizing an assessment tool while also achieving results that best represent community needs and interests. Our findings highlighted the significant nuances in the relevance of indicators like access to formal banking institutions across different communities.

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Appendix

I. Quality of Life Questionnaire

Demographics:

What is your name?

What gender do you identify with?

- A. Male
- B. Female

What is your date of birth?

What community do you currently live in (Municipality, State)?

- A. Oaxaca
- B. Naupan
- C. Michoacán
- D. Tenango
- E. Cuetzalan
- F. Other

According to your customs, traditions, and language do you consider yourself to be indigenous?

- A. Yes
- B. No

If you consider yourself to be indigenous, what ethnic group do you belong to?
(example: Náhuatl, Otomí, Mazahua)

How many people live with you in your current household?

How many months or years have you spent working as an artisan?

How many years have you spent working with SS?

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- Is your job with SS your only form of employment (meaning, your only form of income)?
- A. Yes
 - B. No

If 'No': What is your additional form of employment?

How many children are currently living in your house?

Where did you learn to produce your craft?

- A. Self-taught
- B. Family tradition
- C. Observation within community artisan groups
- D. Formal training
- E. Apprenticeship
- F. Other

What is the highest level of education you have received?

- A. Bachelor's degree/Master's/Doctorate
- B. High school
- C. Primary/secondary
- D. None

What is your average monthly income?

1: Financial Inclusion

1.3.1 Do you currently hold any of these types of products? Select all that apply.

- A. A bank loan (including microfinance or microcredit)
- B. A credit card
- C. A checking/payment account/debit account
- D. A savings account

1.3.2 In your current community, considering factors like physical access, distance, and opening hours, how easy is it for you to access banking facilities?

- A. Very easy
- B. Somewhat easy
- C. Somewhat difficult
- D. Very difficult

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1.3.3 If you, personally, faced a major expense today – equivalent to your own monthly income – How confident are you in your ability to pay without borrowing the money or asking family or friends to help?

- A. Very confident- I would be able to pay without borrowing any money
- B. Somewhat confident- I would be able to cover most of the expense on my own
- C. Slightly confident- I would need to borrow money to cover most of the expense
- D. Not at all confident- I would need to borrow money to cover the full cost of the expense

1.3.4 Do you currently participate in a community savings account?

- A. Yes
- B. No

2. Handcrafted Cultured Heritage

What type of handcrafts do you produce for Someone Somewhere?

2.3.1 Have you received technique training for the crafts you produce?

- A. Yes
- B. No

2.3.2 How often do you feel your finished crafts effectively represent your cultural heritage and/or traditional techniques?

- A. Most of the time
- B. Some of the time
- C. Rarely
- D. Never

2.3.3 Has producing crafts with Someone Somewhere increased your connection to your cultural identity?

- A. Strongly Agree
- B. Agree
- C. Neutral
- D. Disagree

2.3.4 In the last year, how often were you able to make a profit from independent artisanal projects/crafts (unaffiliated with Someone Somewhere)?

- A. Most of the time (all products I produced)
- B. Some of the time (some products I produced)
- C. Rarely (only a few of the products I produced)
- D. Never (none of the products I produced)

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3.1 Social Cohesion

3.1.1 Do you feel like you have a strong support network with your artisanal group (SS, the Alliance)?

- A. Yes
- B. No

3.1.2 Select the statements with which you identify. Select all that apply.

- A. I consider those in my artisan community to be my close friends
- B. The artisan group has helped me create ties (personal or professional) with others outside my work with [artisan enterprise]
- C. I have been able to participate in other community activities since joining the artisan group
- D. I only have a working relationship with those in my artisan group

3.2. Psychological Well-being

3.2.1 Do you agree that working with the artisans/with the artisan group has helped you improve your emotional situation?

- A. Strongly Agree
- B. Agree
- C. Neutral
- D. Disagree

3.2.2 Do you agree that your job with Someone Somewhere has reduced your stress levels in other areas?

- A. Strongly Agree
- B. Agree
- C. Neutral
- D. Disagree

3.3: Perceived Deficiencies in Quality of life

3.3.1 How much do you identify with the following statements? Please select all that apply.

- A. I feel satisfied with my work
- B. I feel satisfied with my home life
- C. I consider that my relationships with family and friends are good
- D. I do not identify with any of the above

3.4: Perceived Discrimination

3.4.1 In the last 12 months, have you experienced the following difficult situations (inside or outside the work environment)? Select all that apply. If none apply, leave answer blank.

- A. Being ignored, treated as if you do not exist

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- B. Being prevented from expressing your opinion
- C. Being unfairly criticized
- D. Having your opinion undermined, being prevented from executing a task
- E. Being the target of obscene or degrading language
- F. Being the object of repeated sexual advances
- G. Being the object of hurtful jokes, being teased

3.4.1B Do you feel that you have been discriminated against due to:

- A. Your skin tone
- B. Way of speaking
- C. Weight or height
- D. Dress code or personal grooming
- E. Place of living
- F. Gender
- G. Age
- H. Religious beliefs
- I. Sexual orientation
- J. Ability status
- K. I did not experience any discrimination

3.5: Environmental Care

3.5.1 Do you ever notice the following in your community? Select all that apply.

- A. Waste in the road, land or any public area
- B. Waste in the road, land or any public area
- C. Waste in water resources such as the rivers, lakes, sea, etc..
- D. Burning waste in public areas

3.5.2 In the area where you live, are you satisfied with the following? Select all that apply.

- A. The quality of air
- B. The quality of the water you drink
- C. Opportunities to preserve the environment (i.e., local conservation efforts such as tree planting opportunities, opportunities to grow your own food, community efforts to protect natural resources)

4. Labor Conditions

4.2.1 Do you feel that, given the time demands, benefits and pay, artisan work is a worthwhile career?]

- A. Significantly
- B. Somewhat
- C. Very little
- D. Not at all

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4.2.2 Is your current salary (or salaries) sufficient for you to cover the cost of services you need (such as medical visits, school costs, housing, and food)?

- A. Always sufficient
- B. Sometimes sufficient
- C. Rarely sufficient
- D. Never sufficient

4.2.4 How often is your payment received when expected?

- A. Most of the time
- B. Some of the time
- C. Rarely
- D. Never

4.2.5 Do you agree or disagree with the statement: My current job(s) offers good prospects for career advancement:

- A. Strongly agree
- B. Somewhat agree
- C. Somewhat disagree
- D. Strongly disagree

4.2.6 Have you received training in the following areas in the past year by Someone Somewhere to advance your skills in the artisan craft sector? Select all that apply.

- A. Administrative/management duties (i.e., community organizing, leadership roles within small groups, etc.)
- B. Marketing
- C. Technology training
- D. I have not received any of these types of training

4.3.1 Select the statements you most identify with (select all that apply)

- A. There are safety protocols in place in case of emergencies (earthquakes or fires) in my workspace
- B. My workspace has good lighting
- C. My workspace is well equipped with the necessary tools).
- D. I am able to rest during my workday when needed

5.2: Gender Inclusion

5.2.1 Select the statements with which you feel you most identify. Please select all that apply.

- A. I believe that women in my community have the same opportunities as men to make decisions and access employment
- B. My work as an artisan/with the artisan group has encouraged me to participate in other economic activities or within the community

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- C. After having this experience with the craft group, I am motivated to start other projects on my own

5.2.2 Select the statements with which you feel you most identify. Please select all that apply.

- A. I feel unsafe in my community due to my gender
- B. I feel that my gender limits my ability to access financial products and services
- C. I feel that my gender limits my ability to access my desired level of education

6.1: Migration

6.1.1 If you had the opportunity, would you move to a different area, or would you prefer to continue living in your current location?

- A. Yes, I would move to a different area
- B. No, I would not move; I would stay here
- C. Unsure

If 'yes' to 6.1.1:

6.1.1A Which of the following reasons make relocation most desirable? Select all that apply.

- 1. Opportunities for increased income
- 2. Opportunities for better education (for myself, my children, or others in my household)
- 3. Improved living conditions
- 4. Other _____

6.1.2 Have you ever moved away from your community to pursue greater opportunities (for education, career, medical treatment, safety, etc.)?

- A. No
- B. Yes

6.1.3 Have any of your relatives ever moved away from your community to pursue greater opportunities (for education, career, medical treatment, safety, etc.)?

- A. Yes
- B. No

6.2.1 How often do you travel more than an hour away from your home for work [to sell your craft or for any other sources of income]?

- A. Never
- B. At least once every few months
- C. At least once per month
- D. At least once per week

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6.2.2 Do you feel that your current location limits the profitability of your work as an artisan? In other words, does your current location limit your opportunities for work and adequate pay as an artisan?

- A. Disagree
- B. Somewhat disagree
- C. Agree
- D. Strongly agree

7: Education

7.1.1 In which areas would you like additional education or training? Select all that apply.

- A. Literacy in my native language
- B. Literacy in other language (English, Spanish, etc.)
- C. Traditional education (science, technology, engineering, math, written skills)
- D. Financial literacy (household budgeting, managing debts, evaluating benefits and disadvantages of different credit products)
- E. Ability to use technology (SMS, Whatsapp, Internet to search for information)
- F. Other _____

7.1.3 Do you feel that any of the following constraints prevented you from achieving your desired level of education?

- A. Distance to school
- B. Cost of schooling
- C. Household duties (i.e., caretaking responsibilities, etc.)
- D. Immediate need for income (i.e., unable to attend school due to work)
- E. Other _____

7.2.1 What is your highest level of educational attainment?

7.2.2 Are the school age children living in your household currently enrolled in and attending school?

- A. Bachelor's Degree / Master's (maestría) / Doctorate / other trade schooling (Carpentry, Electrician, Landscaping, Painting, Plumbing)
- B. High school
- C. Primary / Secondary
- D. None

8. Health

8.1.1 Would you say that in general your health is excellent, very good, good, fair or poor?

- A. Excellent
- B. Very good

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- C. Fair
- D. Poor

8.1.2 In the last month, approximately how significantly did your physical or mental health limit you from doing your usual activities, such as self-care, work, or recreation?

- A. Not at all
- B. Very Little
- C. Somewhat
- D. Significantly

8.2.1 In the last year, how often were you and your family members able to access medical care when needed?

- A. Every time care was needed
- B. Most of the time care was needed
- C. Some of the time care was needed
- D. Care was not accessible when needed

9: Sustainability

9.1.1 Have you noticed any of the following declines in environmental quality? Please select all that apply

- A. Decline in air quality
- B. Decline in water quality
- C. Environmental degradation (deforestation, reduction of green space as a result of construction, decrease in presence of native wildlife as a result of human activity, etc.)
- D. Increased traffic/use of roads throughout local neighborhoods
- E. Other _____

9.2 Do you participate in the following activities? Please select all that apply.

- A. Maintenance of a garden in which you grow your own food
- B. Composting food to use for gardening
- C. Preservation/reuse of scrap materials such as fabric, plastics, glass
- D. I do not participate in any of the above activities

Additional Questions

Additional comments or feedback regarding the content of this questionnaire:

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II.

Focus Group Discussion Template

Ground Rules for focus groups:

Structure: each interviewer leads a discussion group of 5 artisans [preferably artisans from multiple different workshops in one group]

1. **Focus on artisans doing the talking:** We would like everyone to participate on questions when they feel their input is relevant.
2. Take any and all comments and questions from the artisans. In regard to time constraints, use your own judgment.
3. There are no right or wrong answers: Every person's experiences and opinions are important, and we want artisans to feel comfortable sharing when sensitive issues come up.
 1. Encourage speaking up whether artisans agree or disagree. We want to hear a wide range of opinions.
4. **Discussions will be recorded if possible:** Ask permission prior to beginning recording and clarify that nobody will be identified by name in any reports that result from this data collection.
5. **Describe purpose of focus groups, note taking and recording:** Focus groups are used to better understand community needs so that Someone Somewhere can better align their efforts with the interests and goals of community members. Notes and recordings are to be used to document community member input—we want to record thoughts as accurately as possible as long as we have permission to do so. We are trying to get the full range of opinions present among group members, so please speak up if your opinion differs from what you have heard other people say. Again, we are not tracking who says what, and we will never identify individuals—we are only interested in the range of opinions within the community.
6. Ask if there any questions before you begin.

Kids activities : Check ahead to ask about whether children will be present during focus groups. Ensure that paper, pencils, books, toys, etc. will be available for the children to use during focus groups so that the adults are not distracted by their children.

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1.3.1B: How do you or those in your community borrow, save or lend money if and when you need to?

- Probe answers to gauge involvement in both informal (tandas, ROSCAs, etc.) and formal (savings, checking, credit accounts, etc.)

1.3.2B: Do you have a bank account? If not, can you describe the factors that might prevent you from *opening* or *wanting to open* a bank account?

2.3: Assessment of Handcrafted Tradition

2.3.2B: What traditional designs, techniques, and symbols are most important for you to include in your work? Why?

2.3.5: Do you face barriers to working on independent craft projects (not for Someone Somewhere?)

- Barriers may include time or equipment constraints, lack of market, limited distribution channels, etc.

3.1: Social Cohesion

3.1.2: Can you describe your involvement in your craft community?

3.1.3: Can you describe your involvement in the decision-making processes in your community?

3.1.3: Have you ever felt excluded in your craft community? If so, can you describe your experience?

3.2: Psychological wellbeing

3.2.2: How has involvement in the craft community impacted your stress levels in other areas? (i.e., financial security, personal relationships, work/life balance)

3.2.2B: What sources of support do you find have the greatest impact on your stress levels?

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3.4.1: Can you recall any times where you have felt discriminated against in your craft community? If so, could you describe it?

3.5: Environmental Care

3.5.3: In which ways does the quality of your environment impact your health or your ability to work?

- Environmental quality could include water quality, air quality, issues with land degradation, etc.

4: Labor Conditions

4.2.3: Can you describe the difficulties that stand in your way of doing your job efficiently?

- Difficulties may include elements such as poor planning, inadequate tools, poor quality supplies/equipment, lack of supervision or training, product design, work environment, etc.)

4.2.6: Which types of training would be helpful for you to receive from Someone Somewhere to advance your craft skills further?

- Additional training may include administrative/management training for craft groups. Marketing techniques, technology training, product design training, etc.

4.3.2: Can you describe any health and safety concerns that arise from your work with Someone Somewhere?

- Concerns may include exposure to dust/airborne chemicals, unsafe equipment or working environments, or repetitive strain injuries on eyes, back, arms, etc.

5.2: Gender Inclusion

5.2.2B: In which ways do you feel like your gender impacts your work as an artisan? Does your gender ever limit your access to services (such as education or financial products)?

- Can you think of any initiatives, training, or opportunities that might help address any gender inequalities in your craft community?

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- Initiatives/training/opportunities may include financial inclusion training specifically for women, business education initiatives, childcare assistance, etc.

7.1: Education

- 7.1.1: In which areas do you feel that you need additional education or training?
- Areas could include literacy in Spanish/English/other languages, financial literacy such as budgeting or managing debts, technology training, skill-building such as technique training or business management training, etc.
- 7.1.2: Can you describe any barriers you or your children face in accessing education?
- Barriers could include distance to schooling, cost of schooling, household duties, or need for additional income (i.e., unable to attend school due to work)

8.1: Health

- 8.2.2: Of the health-related services that you or a member of your household have needed in the last year, which services were you able to access?
- Services may include emergency healthcare, general/family health center services, vision/dental/hearing services, prenatal/antenatal care, pharmacy services, mental health services, etc.
- 8.3.1: Can you describe any barriers or difficulties you face when accessing healthcare services in your area?
- Barriers to accessing care may include cost, distance to clinics, lack of available specialty care, stigma, etc.

III. Community Profile Template

Community Profiles are organized in the following format:

1. Community background information.

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- This section highlights the location, indigenous identity, craft specialties, and size of each community.
2. **Scored QOL Matrix.**
 - This section uses questionnaire results to place communities on one of four development levels for each category of the QOL matrix. As SS continues to administer its QOL assessment annually, this section can be used to track changes to matrix scores over time to communicate long-term social impact to the community and to stakeholders.
 3. **Focus group results.**
 - This section includes a write-up of findings from focus group discussions as they relate to each category on the matrix. This allows SS to gain a more in-depth understanding of community-specific perceptions of quality of life that may not be captured by matrix scores alone.
 4. **Suggestions for future intervention.**
 - Using findings from questionnaire results and focus group discussions, this section outlines relevant suggestions for QOL improvement initiatives as they relate to community-specific needs and backgrounds.

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IV.

Quality of Life Matrix and Quality of Life Indicators

[Link to Someone Somewhere's Tool for Evaluation of the Quality of Life Experienced by Artisan Groups](#)

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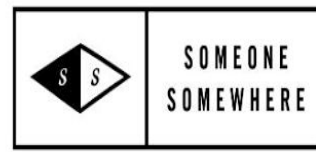
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Research Methodology & Findings



Lilly Evans-Riera & Lexi Gomez

EXECUTIVE SUMMARY

Someone Somewhere operates with a mission to scale artisans out of poverty by generating fair and consistent jobs, spreading business knowledge and increasing communities' connections to local organizations, and expanding cultural and social awareness relating to artisans and their livelihoods. Since 2020, Someone Somewhere has sought to better understand and improve the wellbeing of their artisan partner communities through its quality of life assessment tool, however this tool was limited in its validity and applicability to different communities given the diversity of community cultures and environments. To expand and increase the accuracy of the tool, we initially attempted to validate Someone Somewhere's diagnostic criteria for their tool, while simultaneously preparing "interventions" to scale quality of life in the communities of Oaxaca and Naupan. In doing so, our research focused on the following:

1. *Expanding Someone Somewhere's Quality-of-life matrix* by adding measurements for education, migration, sustainability, and health and wellness (benefits and services) in order to make their diagnostic matrix measurements more relevant to each community.
2. *Designing and conducting semi-structured focus groups* with artisans in the communities of Naupan and Oaxaca in order to gather new data on each community's current needs as well as test the quality of life matrix dimensions for relevance.

This data collection process highlighted the problems associated with the use of a single, broadly applicable matrix tool when assessing and defining quality of life in different community contexts. This nuance has the potential to compromise data collection and subsequent impact efforts. To increase the accuracy of the tool and the relevance of the quality of life indicators when applied in different community contexts, we sought to re-evaluate the basis of QOL assessments by tailoring matrices by community according to what artisan communities consider to be most relevant in focus group discussions.

In the present document, we outline the timeline of our research activities, the methodology behind our adjustments to Someone Somewhere's matrix tool, and findings from each focus group as a model community-profile template. Using our findings, we recommend the use of our expanded QOL diagnostic tool and matrix, explain and outline additional recommendations for delivering future interventions to communities.

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Project Overview

Company Context:

Upon beginning research with Someone Somewhere in March of 2022, it was clear that the company had been successful in helping to scale certain dimensions of quality of life of the artisans they work with. This is done primarily through providing orders and payments, but Someone Somewhere is not just a business—it is a social enterprise that was founded on a deep appreciation and concern for the careful art of hardworking Mexican artisans. As a result, the mission for its partnership with artisans transcends business and joint production. This is clear in their three primary goals to generate fair and consistent jobs, empower artisan communities by spreading Someone Somewhere’s know-how, and expand cultural and social awareness relating to artisans and their livelihoods.

Initial Assignment:

Due to their success in business and social impact, it has become increasingly common for similar artisan social enterprises abroad to inquire about Someone Somewhere’s “know how”— or methodology— to scaling artisans' production while also supporting them socially. Their methodology has evolved over time into what Someone Somewhere calls their “pathway”, which is essentially a model made up of lessons learned over time from their artisan communities, other artisan brands, and mentors on how to ensure that the company is building the appropriate strengths and systems for better production and quality of life. In keeping with Someone Somewhere’s core goals of spreading their know-how and expanding cultural and social awareness of artisans’ livelihoods, we were initially tasked with validating part of their pathway, specifically the Quality of Life matrix, according to international standards for artisans’ quality of life. Doing so would help artisan enterprises evaluate their progress, identify their needs for social support, scale as Someone Somewhere has been able to, and prove to investors that artisan enterprises can make strong suppliers with the right support.

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Origin of Research Questions:

As we set out to create a more replicable Quality of Life (QOL) assessment model that used pre-determined guidelines to measure artisans from any given location in the world while also prioritizing how that community self-diagnosed quality of life, we had questions that would be crucial to our research process. First, how would we identify the dimensions and indicators of quality of life that were most broadly applicable for artisans everywhere? Second, once we solidified QOL guidelines, how would we communicate them to the artisan collectives themselves and determine who should be leading actions towards improving QOL?

Preparation for In-Field Research Activities:

Our initial research workplan focused on collecting data from various artisan enterprises abroad on their definitions of QOL and was initially meant to be conducted remotely due to travel restrictions. Fortunately however, we had the opportunity to travel to Mexico for in-field research and shifted our focus from internationalizing the QOL assessment to instead validating it among the artisans in Oaxaca and Puebla. We did so through expanding the matrix dimensions and complementary questionnaire to gather more data, reviewing relevant literature on global and Mexican indicators of QOL to support their use in QOL measurement, and structuring focus groups to better understand the different artisan collectives. Alongside validating and preparing the QOL assessment, we also prepared “interventions” to deliver during our visits. Though our plan changed significantly from internationalizing the matrix, the same questions regarding how to determine widely applicable QOL dimensions and who would initiate improvements in QOL remained at the forefront of our research activities.

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Research and Key Findings:

In-field focus groups and general observations in each community provided us with invaluable data and insights into what artisans value and work towards, the significance of their crafts in their lives, and perhaps most importantly, how their definitions of quality of life vary depending on their community and local contexts. In our data analysis, we found that despite researching and validating QOL dimensions as important to measure across different communities, focus group discussions revealed that an indicator may not hold the same significance for determining one community's well-being as it does in another. Therefore, the accuracy of future assessments would benefit from taking into account focus group data as each environment has unique standards for QOL and should have a score that reflects those.

Final Conclusions:

Reflection on the past nine months brings to mind how steadfast Someone Somewhere has been in its mission to best support their artisan partners for ten years, mostly as a platform for their work and offering attentive social support when needed. Positive impacts in their artisan collectives have relied on data collection to provide a basis of knowledge. However, in order to most effectively and appropriately scale artisan communities, it is of utmost importance that Someone Somewhere first practice community-centered QOL assessment and intervention methods by accounting for that specific artisan collective's goals. The recommendations we will make pertain to both research questions of how to ensure accurate assessments and who should be leading movements towards improving QOL by dividing our insights according to how Someone Somewhere can scale from how the artisans can scale.

Keeping in mind the importance of artisans' agency in the partnership, analysis of our research will explain the future value of community-centered QOL assessment in delivering meaningful community development programs. The model we will propose not only provides a way to reconcile broad QOL standardization with the specific values of artisan communities across Mexico, but around the world as enterprises abroad also hope to assess QOL using standards, but with a human-centered approach.

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Problem Statements

The previous quality of life (QOL) assessments that Someone Somewhere has conducted in artisan communities have followed the standards outlined in their matrix and questionnaire. These diagnostic tools serve to measure various dimensions of quality of life as they are defined by both international and national guidelines, or indicators, of high QOL. Though Someone Somewhere had developed its matrix and questionnaire to score quality of life, the accuracy of the indicators—or standards—of the matrix had not yet been validated as to ensure their effective applicability across artisan communities. The company has measured quality of life and tracked impact without using validated measurements, but the accuracy of data and resulting impact efforts need to be verified. In addition to QOL indicators not yet being validated, the dimensions in the matrix have not previously included measures for artisans' experiences with migration, education, health and wellness benefits, or sustainability.

By validating the standards of the quality-of-life questionnaire and matrix and expanding the dimensions of quality of life by which artisans are measured, Someone Somewhere will improve the accuracy of measurement and future impact efforts.

Beyond needing to ensure that Someone Somewhere's matrix contains standards that are relevant and applicable to its partner communities, their efforts to address areas of concern within artisan communities have not recently been verified through qualitative research. While the matrix is a practical tool with a broad range of standards to diagnose the varying artisan communities throughout Mexico, one matrix alone cannot reflect all the nuances of each community's unique lifestyle, mission, and overall needs. Exclusively using questionnaire results to determine impact initiatives presents limitations on efficacy since each community faces unique obstacles to Someone Somewhere's ideal scaling level.

The need for more holistic and community-centered research methods, beyond the use of a standardized matrix, calls for more supplemental qualitative research and open discussion with artisans.

With the mission of providing narrowly tailored support to its artisan communities, qualitative research to expand upon quantitative findings will help to ensure comprehensive quality-of-life assessment, a clearer understanding of community-identified needs, and accuracy in future impact initiatives.

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Research Activities & Methodology

1. **Revising Someone Somewhere's existing Quality of Life Matrix and Diagnostic Questionnaire:** *(Does the tool currently measure QOL accurately and broadly?)*
 - a. We conducted a literature review on national (Mexico-specific) and international guidelines on quality of life measurement, subjective wellbeing assessment, and recommendations on measuring quality of working environments in order to validate and revise the existing QOL indicators in each dimension of Someone Somewhere's matrix. Gathering evidence on each topic and indicator was helpful in determining the topic's relevance to QOL measurement.
 - b. To supplement research on international guidelines for quality of life measurement, we conducted an additional literature review on best practices for the evaluation of artisan wellbeing in order to identify additional indicators for quality of life assessment.
 - c. This allowed us to adjust the existing diagnostic questionnaire (see appendix A) to better reflect revised indicators. We also expanded Someone Somewhere's original matrix (see Appendix B) by adding four measurements (education, migration, health and wellness benefits and services, and sustainability) in order to increase its broad applicability.

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2. *Gathering Qualitative Data to Test Relevance of Additional Dimensions:*

(What are the current strengths and areas for improvement in each artisan collective? How do they vary by community?)

- a. Our initial project description tasked us with developing intervention recommendations to correspond with matrix scores; for each dimension on the matrix, communities with low scores would receive pre-determined interventions aimed at scaling their development in the given area. For example, communities with low financial inclusion scores would receive additional, ready-to-administer training sessions on informal methods of saving and money-lending. Our initial research plan aimed to administer the revised QOL assessment and implement interventions based on community scores during our field visits. Our concerns with this approach, specifically in our ability to competently develop tools to aid in community development without the input of community-members themselves, led us to revise our plan for field research prior to our arrival in Mexico.
- b. To more accurately identify opportunities for community-development efforts, we designed and conducted 18 semi-structured focus groups in artisan workshops. Half were conducted in the urban city of Oaxaca while the other half were conducted in rural Naupan, Puebla.
 - i. Focus groups were used to discuss community members' perceived well-being and current needs in regards to financial inclusion, their current hindrances to both independent and collective craft production, and their environmentally sustainable practices. The input we collected allowed us to re-orient our QOL assessment to reflect community-identified indicators of wellbeing.
- c. In addition, we conducted workshops and held community-wide, informal conversations to understand community-identified needs in the areas of financial inclusion, creative preservation, and sustainable environmental practices in artisan communities. Results from workshops were used to align suggestions for future impact efforts with artisan community goals.

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- 3. Community-Centered Data Analysis:** *(How can Someone Somewhere incorporate qualitative data into QOL evaluations to make each community's score more reflective of their unique local context and goals?)*
- a. We first began our data analysis by consolidating artisans' statements from each focus group. General in-field observations about artisans' interpersonal dynamics and their physical environments were also considered relevant. We then organized and separated this qualitative data according to the community and QOL indicator that they pertained to.
 - b. Upon reviewing each community's qualitative data, it was clear that differences in the collectives' environments contributed to differences in their priorities for scaling in QOL. Because several indicators varied in relevance depending on the community, we identified the need to create an additional method by which Someone Somewhere could contextualize each community's QOL score with details on community-specific wants and needs. Doing so would make QOL assessment more collaborative and closely aligned with artisans' self-perceived well-being
 - c. In an attempt to give shape to our method of community-centered QOL evaluations, we identify qualitative data from focus groups that support or conflict weighing the indicator in communities' matrix scores. Refining each community's matrix according to their focus group data acts as a form of validation and helps to identify the areas where communities need community-specific impact efforts if they are to scale.

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Key Findings & Deliverables

Finding 1: QOL assessments must include qualitative data in order to accurately and holistically measure community wellbeing.

Adding qualitative research methods to existing quality of life assessment procedures will advance Someone Somewhere's mission to improve artisans' quality of life by gathering more nuanced data and artisan feedback on their unique environments, hindrances, and affordances for growth. Qualitative methods which fully take into account community contexts will advance the validity of quality-of-life assessment and future impact.

Dimensions of quality of life vary in cultural relevance, and findings from focus group discussions demonstrated the ways that geographic location, community culture, and access to resources and institutions influenced the applicability of indicators across communities. For example, while many participants in Oaxaca's focus groups expressed interest in expanding access to formal savings accounts and online banking-which many of them already partake in-, women in Naupan expressed disinterest in the use of formal banking services. In fact, when asked if they had bank accounts, the answer was *"Thank God we don't"*. In discussions about why they felt this way, it became clearer that their regional contexts, specifically distance from urban banks and lack of trustworthy resources on how to use banking services, were important to factor into how their QOL is scored.

Thus, while a low financial inclusion score in Oaxaca may highlight increased opportunities to heighten access to banking services, a lower financial inclusion score for Naupan may be a less relevant indicator of quality of life.

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Findings like these highlight the importance of supplementing matrix scores with focus group results. Open-ended discussions on each dimension allow SS to better identify community-specific interests and needs regarding each dimension in order to more narrowly tailor its impact efforts; while efforts in Oaxaca may focus on connecting artisans with online banking services, effective financial inclusion initiatives in Naupan must surround capacity-building for informal savings groups. To be considered a broadly-applicable tool, the QOL assessment must use qualitative data to contextualize matrix scores according to community preferences.

We understand that a concern of Someone Somewhere's impact team may be that sometimes, communities aren't aware of the relevance that some indicators could have in evaluating their quality of life. Perhaps the company would like to score the artisans according to a certain indicator despite artisans feedback. For this reason, the matrix maintains the original dimensions to measure in each community. However, it also ensures more flexible QOL evaluation by allowing focus group data to select existing indicators to score or even creating new indicators.

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Deliverable 1: Expanded Quality of Life Assessment Tool

Results from focus groups emphasized the nuance in community-specific needs, indicators of wellbeing, and goals for future development. This highlighted the limitations of a standardized QOL assessment tool in accurately identifying and evaluating *community-specific* indicators of wellbeing. We suggest we use our community-oriented survey and focus group templates to help us adjust how we are scoring the communities on the matrix and how to use the results we are scoring. Overall, factoring qualitative data into scoring acts as a validation of QOL assessment and emphasizes the collaboration between Someone Somewhere and artisans.

- a. We created an expanded diagnostic tool (See deliverable 1) that includes:
 - i. A revised diagnostic questionnaire, which includes questions based on validated guidelines for QOL assessment and indicators of wellbeing as identified by artisans themselves during community visits.
 - ii. The revised and expanded QOL matrix, with an updated scoring system to reflect the relative weight of qualitative (i.e, questions on perceived barriers to additional education or training) and quantitative indicators (i.e, questions that quantify total educational attainment) to allow SS to assess the impact of its partnerships over time and identify areas where additional impact efforts can be channeled.
 1. Though it is our recommendation to use the tool to weigh indicators' relevance according to focus group data, it is ultimately up to Someone Somewhere to decide to fully weigh certain indicators if they are considered overwhelmingly important to QOL. Of course, there is a need to balance SS's goals for scaling artisans with what artisans want. Therefore, if Someone Somewhere does fully evaluate artisans according to the indicators, the company should be prepared to offer tangible solutions through support from NGOs or inform them of their options and possible benefits to achieving solid scores in those indicators.
 - iii. A supplementary list of focus group questions to be administered alongside QOL diagnostic questionnaires yearly. This will allow SS to keep a standardized assessment tool, while supplementing quantitative indicators of QOL with qualitative data to account for community-specific needs, goals, and feedback as they relate to relevant matrix dimensions.

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Finding 2: Increased written data on the artisanal experiences and cultures of each partner community will help to contextualize data on quality of life and impact measurement

Developing community profiles for each community as we've done with Oaxaca and Naupan will advance assessment and future impact efforts by outlining community-specific backgrounds and future development goals. It ensures that we're adapting the specifics of interventions to the needs of communities.

Over the course of our research, we identified a need for accessible information on each artisan community in order to more accurately determine best practices in addressing community development needs. Someone Somewhere maintains strong, personal relationships with its partner communities, and these relationships have informed the majority of SS's existing impact and capacity-building efforts. While this helps to ensure that SS's current involvement with its older partner communities aligns with community interests, it has resulted in a lack of readily-available documentation on the partner communities themselves. Currently, Someone Somewhere does not have a comprehensive, written report of the craft specialties, indigenous identities, size, and locations of each community, and its existing impact measurements have not been analyzed in community-specific contexts. This hinders SS's ability to efficiently conduct community-specific needs assessments using their QOL tool.

Increasing the availability of data on each community's backgrounds, interests, and results from QOL assessments will improve SS's ability to communicate improvements to community wellbeing as a result of partnerships, and will provide a more accessible format for impact reporting to share with stakeholders, future fellows, or new employees who do lack background knowledge on each community.

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Deliverable 2: Community Profile Template

Developing a template for community profiles would allow SS to standardize a method of reporting results of QOL assessments in community-specific contexts rather than in one, comprehensive report. This will help SS to more accurately apply assessment results to community needs. **In the interest of privacy, the content of this deliverable is accessible only to Someone Somewhere.**

Our second deliverable provides SS with a template for reporting QOL assessment results. **The template for results reporting is included in the appendix of deliverable 1, and uses the following format:**

- a. **Community background information.** This section highlights the location, indigenous identity, craft specialties, and size of each community.
- b. **Scored QOL Matrix.** This section uses questionnaire results to place communities on one of four development levels for each dimension of the QOL matrix. As SS continues to administer its QOL assessment annually, this section can be used to track changes to matrix scores over time in order to communicate long-term social impact to stakeholders.
- c. **Focus group results.** This section includes a write-up of findings from focus group discussions as they relate to each dimension on the matrix. This allows SS to gain a more in-depth understanding of community-specific perceptions of quality of life that may not be captured by matrix scores alone.
- d. **Suggestions for future intervention.** Using findings from questionnaire results and focus group discussions, this section outlines relevant suggestions for QOL improvement initiatives as they relate to community-specific needs and backgrounds.

In our visits to Oaxaca and Naupan, we did not collect focus group data on each of the dimensions due to the fact that our methodology of incorporating focus group data into community's QOL scores was developed after travel. Therefore, we have not produced a complete example of a community profile. However, we have included focus group results on the dimensions of the matrix that artisans did discuss in the template. These are coupled with suggestions for future interventions (see Appendix C and D).

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Recommendations for Future Research

Recommendation 1:

To create intentional impact in specific dimensions of quality of life, Someone Somewhere must consider delegating impact efforts to organizations within artisan communities, because Someone Somewhere alone cannot effectively intervene in all dimensions in such a way that meets community-specific needs.

Our findings highlighted the diversity of concerns between artisan communities, emphasizing the importance of administering *community-oriented solutions to community-identified problems*. The implementation of pre-determined interventions developed by SS according to assessment scores- as originally intended- fails to address the nuance in needs, goals, and indicators of development across communities. Additionally, efforts to address areas of concern for each dimension of the present matrix extend beyond SS's current capacity and role, first and foremost, as a business partner. It is important to acknowledge the mutual benefit that exists in SS's relationship with its thirteen partner communities, and the framing of community members as 'beneficiaries' miscommunicates SS's role in the administration of benefits: Artisan communities benefit primarily from the expanded access to fair, stable income, employment, and market access provided by their partnership with SS- all of which indirectly improve wellbeing in each of the nine QOL dimensions-, and SS does not have the capacity to directly provide benefits beyond these.

Thus, in order to more effectively and competently assist communities in addressing QOL concerns, SS must delegate responsibilities to local organizations. In taking the role as facilitator, rather than administrator, SS is able to ensure its partner communities receive assistance that better aligns with community-specific culture and needs.

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Recommendations for Future Research

Recommendation 2:

To further validate their assessment tool, Someone Somewhere must administer its QOL questionnaire and focus group questions to a greater sample of artisans.

Our time in artisan communities focused primarily on qualitative data collection, which was used to inform further changes to the QOL questionnaire. The finalized questionnaire included in the present report has not yet been administered to artisan communities, and we recommend that Someone Somewhere pilot the tool with at least 10% of the total population of each of its 13 artisan partner communities' in order to achieve a representative sample, and make adjustments to content accordingly.

Our focus group discussions were held with a larger sample of artisans, but were only administered in two of SS's thirteen partner communities. We recommend that SS administer the assessment tool in its current state to the remaining communities in order to ensure the applicability of the tool.

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The Path to Becoming a Stronger Scale-Up

Overall, our research project and findings intend to strengthen Someone Somewhere's qualities as a scale-up, beyond those of a start-up. The path to scaling-up requires developing more expertise in many different areas. The company's team has been dedicated to developing expertise in social procurement and social economic ideals in their partnership with artisans for over a decade. They've previously done so by following a 4-step framework of understanding, designing, envisioning, and scaling. In the case of our research project, we recommend that for the future, Someone Somewhere focus impact assessment and initiatives on the following:

1. *Understand*: Employ a more comprehensive and self-evaluative QOL assessment of the diverse artisan collectives.
2. *Design*: Delegate impact initiatives and interventions appropriately among artisans, Someone Somewhere, and nongovernmental organizations (NGOs). Doing so will increase impact by more efficiently decreasing barriers to craft production and a higher QOL.
3. *Envision*: Increase impact investment by proving past success and future potential for artisans' partnership with Someone Somewhere.
4. *Scale*: Improve and sustain artisanal way of life as artisans receive regular income and continue their traditional craftwork with ease.

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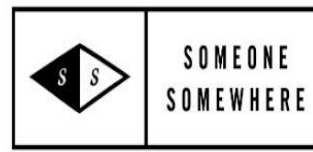


Appendix

- A. [Original QOL Questionnaire](#)
- B. [Original QOL Matrix](#)
- C. [Expanded QOL Assessment Tool](#)
- D. [Community Profile Template](#)

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Someone Somewhere Action Research 2022: White Paper



EXECUTIVE SUMMARY

As a Mexico-City-based retail brand that incorporates artisanal handicrafts into modern apparel, Someone Somewhere (SS) has sought to provide their artisan partners with secure employment while also preserving their waning traditional loom and embroidery work. In providing their partnered artisan communities with more stable income, the company has been able to help improve different dimensions of their quality-of-life (QOL). Building on their success in helping to scale quality-of-life, Someone Somewhere continues to expand its partnerships with other artisan enterprises in Mexico. Beyond Mexico, however, SS hopes to share their model, or “Pathway” for scaling artisan communities, with similar enterprises abroad who wish to foster socially impactful business relationships with their own artisan partners like SS has been able to.

The Pathway’s QOL assessment gives SS the opportunity to create community development programs that correspond to their needs. Assessments over time in the communities are not only conducted to develop supportive initiatives for artisans, but also to demonstrate the overall impact of the social enterprise’s relationship on the artisans over time.

The quality-of-life assessment developed by SS is an effective means of demonstrating the company’s impact to investors, but standardized methods of assessment are limited in their accuracy when applied across diverse populations. A standard scoring system may actively distort a community’s score when applied to a community that doesn’t have an interest in achieving outcomes that may otherwise be applicable in other communities. Our research, guided by a series of in-person focus groups in the artisan communities of Naupan and Oaxaca, informed adjustments to SS’s existing tool in order to incorporate qualitative data into their quality-of-life assessment and better reflect the nuances in community-specific needs and goals.

Based on findings, this report:

- Explains the use and value of Someone Somewhere’s quality-of-life diagnostic tool
- Identifies solutions for the standardization of quality-of life diagnostic methods
- Provides actionable recommendations for Someone Somewhere and similar enterprises to improve their impact assessment tools and corresponding development efforts

SS’s revised diagnostic tool offers a solution to enterprises looking to increase the efficiency and accuracy of impact reporting measures. The present report communicates the value of standardized impact reporting that incorporates qualitative data: for investors, through comparable reports that demonstrate enterprise impact over time and across communities; for enterprises, through a broadly applicable evaluation tool; and for artisan partners, through community development programs that are better aligned with their interests.

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Background

As a retail brand that incorporates the hand-woven materials of their artisan partners into modern apparel, Someone Somewhere has sought to not only provide artisans with secure employment, but more broadly, preserve the waning practices of traditional loom and embroidery work and in turn, participate in strengthening the artisanal craft sector as a whole. By doing so, the company has been able to improve the quality-of-life of the artisans they work with.

Someone Somewhere's mission has always been to act as a fair intermediary between artisans and their clients by ensuring that the artisanal process and final product are fairly compensated rather than undervalued in tourist locations or not sold at all. As both a business partner that is responsible for employing artisans with retail orders and a social enterprise that centers the well-being of artisans in their business practices, sales and impact are inextricably linked.

Because Someone Somewhere seeks to ensure that their business practices enhance artisans' lives culturally and socially as well as financially, it's critical to their business model that, alongside sales and marketing efforts, they regularly assess the quality-of-life of the artisans they work with. Previous quality-of-life assessments that Someone Somewhere has conducted in artisan communities have followed the standards outlined in their Quality-of-Life Matrix and questionnaire. These diagnostic tools serve to measure various dimensions of quality-of-life as they are defined by both international and national guidelines, or indicators, of high quality-of-life.

Though Someone Somewhere had developed its matrix and questionnaire to score quality-of-life, the accuracy of the indicators used in the matrix had not yet been validated so as to ensure its effective applicability across artisan communities. As a result, the data that they have collected may not be accurate. In addition to quality-of-life indicators not yet being validated, the categories used in the QOL matrix have not previously included measures that accurately represent the artisans' needs and priorities, such as their experiences with migration, education, health and wellness benefits, or sustainability. By collecting data on how artisans perceive their own quality-of-life, Someone Somewhere can identify ongoing needs, interests, and priorities, and take subsequent action to better meet them.

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Challenges in Impact Assessment

Impact assessment in the social enterprise ecosystem is challenged by the diversity of cultural resources, backgrounds, and goals of their key collaborators. Particularly in partnerships with artisan collectives who utilize different craft techniques in a variety of cultural contexts, it is the ethical responsibility of social enterprises to tailor impact assessments according to community-specific interests. It is necessary to communicate social impact to investors, partners, and additional stakeholders to secure and maintain the funding and partnerships that sustain the value exchange between social enterprises and artisan collectives. However, ***there is currently no model for a single, replicable impact evaluation tool that can accurately assess social impact across different community contexts.***

Commonly used impact metrics such as increases in annual income, educational opportunities, and paid working hours communicate the tremendous impact of the benefit exchange between enterprises and their partner communities, but such measurements fail to capture the ways that quantifiable increases in traditional indicators of wellbeing may influence more specific areas of community wellbeing. To most effectively orient partnerships and distribute funding to support interventions to enhance communities' QOL, it is important for enterprises to understand community members' perceptions of various dimensions of subjective wellbeing that reflect community priorities.

To standardize a method of impact evaluation guided by community-member input on subjective wellbeing, *Someone Somewhere* has sought to develop a pathway model which they intend to eventually replicate internationally to assess and report on community wellbeing in order to better align impact efforts with community needs. The quality-of-life assessment tool previously relied on a standardized questionnaire to track community members self-reported well being across different dimensions. This method effectively incorporates subjective measures of wellbeing into impact assessment, but, in its original form, reports on community quality-of-life using a single, narrow set of subjective wellbeing and development indicators. Thus, this set of indicators could not be broadly and accurately applied to all communities to communicate specific impact or meaningfully enhance QOL within those communities.

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Audience

This paper intends to offer greater insight into the methodology and value of an impact assessment tool that evaluates community wellbeing. In sharing this approach, SS's model seeks to contribute to a wider conversation about the importance of human-centered and community-led design when assessing and scaling social impact. The discussion of the value of SS's quality-of-life assessment tool lays the ground for future research on accurate and community-oriented impact reporting. Primary audiences for this paper include:

→ Someone Somewhere's executive and impact team, or other staff members or stakeholders involved in efforts to elevate the QOL of artisan partners. This information will assist SS in their use of the tool to better understand the specific needs of communities, focus impact efforts more accurately and efficiently, and satisfy SS's desire to improve artisan well-being. As a result, this paper also aims to satisfy the brand's overarching goal to garner more orders from ethically-conscious brands and impact investors by describing the tools' ability to increase the accuracy and value of impact assessments and by outlining recommendations for future research in this regard.

→ Other social enterprises looking to assess impact on the wellbeing of artisan partner communities. Someone Somewhere seeks to eventually replicate and disseminate its methods of impact evaluation through its pathway model, and the present report outlines the methodology and value of SS's model of impact assessment in addressing the limitations associated with evaluating enterprise impact on communities with diverse sets of needs.

→ Investors and partner organizations looking to understand the methodology behind impact reports. The tool described in this paper aims to measure the social impact of SS-commissioned labor on artisan communities, and identify areas where impact efforts can be most effectively implemented based on community-identified needs. As such, explanations regarding the structure and use of the tool can be used by stakeholders responsible for commissioning orders or funding QOL enhancement programs.

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Methodology

To standardize a method of impact assessment that captures the influence of enterprise involvement on community wellbeing, the methodology behind the matrix tool enables enterprises to answer three critical questions:

1. How much impact does partnership with community collectives have on their wellbeing over time?
2. How does impact vary across communities?
3. Along which dimensions of community development would interventions be most beneficial for each partner community?

Someone Somewhere's original Quality-of-Life Matrix initially consisted of 5 categories of quality-of-life to represent artisan community development: economic wellness, handcrafted cultured heritage, self-perceived well-being, labor conditions, and gender inclusion. These 5 dimensions were established as pillars of quality-of-life according to SS's observations of what communities and investors consider to have the greatest influence on community wellbeing.

We began our research by expanding and validating the quality-of-life questionnaire and corresponding matrix to include the additional dimensions of education, healthcare access and utilization, migration, and sustainability. We chose these additional dimensions to gather more information in areas relevant to their mission and investor interests, with the intention of increasing opportunities for funding in areas of need as demonstrated by matrix results. In order to validate the new and existing dimensions, we began by conducting a literature review on the national and international guidelines on quality-of-life and subjective wellbeing assessment for each dimension in order to support the use of their respective indicators and ensure their validity as scoring standards.

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to further validate the tool by gauging community-defined standards and goals for quality-of-life, we conducted a series of focus groups in the artisan communities of Naupan and Oaxaca. These focus groups emphasized the role of community culture, craft technique, and geographic location in shaping standards of wellbeing and development. Leveraging SS's relationships and informal knowledge about community culture in their impact assessment, we expanded the diagnostic tool to include a template for focus group discussions as an extension of the quality-of-life questionnaire. Using our focus group discussion results, we then adjusted the corresponding matrix to account for nuance in community culture. The inclusion of qualitative data in final community development scores addresses the limitations that arise from quantifying wellbeing in a standardized tool, as uniform questionnaires cannot fully capture the nuances of each community's hindrances to growth, personal and collective goals for the future, or self-perceived priorities and needs.

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QOL Assessment Tool

The tool, in its current form, is presented in the following structure:

1. Quality-of-Life Diagnostic Questionnaire

The diagnostic questionnaire includes questions on 9 dimensions of subjective wellbeing and community development, intended to assess individual experience in dimensions such as education, financial inclusion, social cohesion, gender inclusion, and labor satisfaction. The questionnaire is intended to be administered to a representative sample of members from each artisan community.

2. Focus Group Discussion

A standardized focus group script is used to guide interviews with community members to supplement and contextualize questionnaire scores. This is intended to capture nuance and cultural contexts that may not be represented by questionnaire scores. Facilitator notes on responses to discussion questions are recorded using the discussion template to identify community-specific indicators of wellbeing for each dimension of the matrix.

→ **Focus group results are used as a guide for determining which indicators of wellbeing are most representative of a specific community's development.** For example, indicators of financial inclusion may differ significantly across communities based on geographic location, access to mobile banking services, and availability of physical banking institutions. Thus, while access to formal banking services may be a realistic indicator of wellbeing for some communities, participation in community-led savings groups may be a more appropriate indicator of financial inclusion for others.

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3. Quality-of-Life Matrix

Individual questionnaire scores are then consolidated to achieve an average community development score. Scores are reported in a matrix format, where community development is ranked on a scale of 1-4 for each dimension. **Using focus group discussion results, indicators of wellbeing for each dimension may be adjusted to account for community-specific contexts.** Using the example of financial inclusion, communities whose focus groups indicate that use of formal banking institutions is neither a desirable or achievable standard of development will be scored in the financial inclusion dimension using participation in community-led savings groups as an indicator, and responses to questionnaire questions about formal banking access can be omitted from their development scores. **→ This approach allows enterprises to account for distinct indicators of wellbeing while still achieving a standardized scoring system, enabling comparisons of community wellbeing across communities.** Scores for each dimension are then averaged to achieve a comprehensive development score.

The scoring system as outlined above is beneficial, firstly, in that it follows a standardized format. The matrix uses a consistent scoring system, so that each community's score will be comparable to one another despite using community-specific indicators of wellbeing. The benefits here are two-fold: first, enterprises can use a single tool to efficiently conduct impact assessment. Secondly, scores will more accurately reflect wellbeing in a way that can be accurately addressed by enterprises, their investors, and through partnerships that facilitate the delivery of additional benefit programs. Third, because the scoring system adapts to the priorities and preferences of each community, the scores can be meaningfully compared to each other. For example, the fact that one community earned an average score of 3.2 indicates that their quality-of-life is substantially better than a community which earns a score of 2.4.

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Value of Standardized Approach

1. Assessing Community Wellbeing Over Time

SS's model of quality-of-life assessment is intended to be a long-term means of impact evaluation. The proposed model gives enterprises the opportunity to identify a community's baseline needs and preferences, and utilizes a replicable template to be re-administered annual. This allows enterprises to track changes in community wellbeing, identifying connections between business practices, QOL interventions, and specific dimensions of community wellbeing. Across communities, enterprises can track long term change in community-specific contexts.

Results over time would alert SS of the need to periodically run the focus groups again to see if their priorities or definitions of wellbeing have changed over that time. In addition to using focus groups to inform questionnaire content, focus groups also build community relationships that are necessary for mutually beneficial partnerships.

2. Assessing Impact on Diverse Populations

The design of the tool allows enterprises to be guided by community input in their assessment of impact, and positions them to integrate data on the community-specific social and cultural contexts that determine the relative importance of different dimensions of wellbeing. For enterprises working with multiple communities who possess varying standards and goals for development, this tool strengthens the accuracy of impact measurement and better aligns corresponding community development initiatives to member-identified needs. For the field overall, SS's quality-of-life diagnostic tool models a means of assessment that will allow investors and partners to identify areas where funding can be more specifically channeled to achieve the greatest and most efficient impact.

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3. Role of matrix tool in benefit provisions

Through collaboration with community members to determine development indicators, the methodology behind SS's tool helps enterprises identify areas where scaling is both needed and feasible. In communities where access to formal institutions is limited or undesirable, measurements of wellbeing that use formal institutional involvement as a standard of development may falsely represent a community's interests. With the overarching intention of scaling development scores over time, it is counterproductive to use indicators that are not achievable given a specific community's culture, interests, or realistic access to resources. SS's method of impact evaluation places emphasis on the value of community-based solutions to development concerns, which ensures that the standards of development in each dimension are achievable in a given community.

This approach better positions enterprises to scale community development by using specific dimension scores to identify opportunities for additional benefit programs. Partnerships with community-based collectives are the foundation of enterprises such as SS, and the longevity of these enterprises relies on the mutual exchange of benefits between businesses and communities. To generate partnerships and continued support from investors, SS must be able to communicate their impact on partner communities that stems from this benefit exchange. Moreover, in order to scale its impact, SS relies on external partnerships to deliver larger scale interventions to communities who may lack the resources to meet and exceed their development goals.

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