

# **The Sustainable and Just Association: The Role Associations Can Play to Help their Members Accelerate a Just and Sustainable Future**



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## Introduction

As society emerges from the global pandemic, everything is changed. Among the changes that trade, industry, and professional associations are grappling with are the new realities for themselves and their members. As society hurtles through the 21<sup>st</sup> century, the sectors and professions that built the Canadian economy are encountering a chasm, requiring a leap of faith into the future. Global social and environmental tectonic forces are reshaping the risks and opportunities industries and professions face as they steward the success of their organizations. Associations that represent professionals and organizations around the world will be upgrading their toolboxes to foster sector and professional resilience and relevance for the turbulent times ahead.

Leading associations understand this and are updating their value propositions for the new reality. They seek to both mitigate the risks and take advantage of the opportunities presented by the new decade. Mandated to foster the success of their members, they are peering into the future to decipher the roadmap that leads to that success. As those who built their sectors and professions decades ago face the transitions ahead, they realize that the new generations are less attached to the old affiliations. The new members seek strategies for their associations to make a larger contribution to the world. Trends in society suggest that the future workforce will be asking:

***“How do we unlock the higher potential of our profession / sector to contribute to a better society?”***

The future suggests that successful sectors and professions will rethink their inward-facing mandates to embrace a stronger role in creating value for not just their members, but also for society and stakeholders. While their North Star might be currently obscured, leading associations want to assure themselves they are not chasing the wrong

***Associations and their members are encouraged to review these findings and engage boards and memberships on the questions contained therein. In so doing, Canada and the sectors, industries and professions that make it tick will be put on a more viable path for one and all.***

star. While their primary task will remain to serve their members, increasingly, serving their members will come to be defined as “serving society”.

This research paper and [companion report](#) shed light on this quest. It sets out to answer the question:

***“What role can associations play to help their members accelerate a just and sustainable future?”***

These reports were commissioned by the Canadian Government via Employment and Social Development Canada, which is interested in accelerating the response of the private sector to contributing to a sustainable and just future for Canadians and their communities. The underlying premise is that if associations representing the private sector and professional groups could be engaged to harness their reach, scale, and influence to support their members to be future-fit, they would simultaneously help steward Canadian society to live within its planetary means, where no one is left behind.

This research report is designed to contribute to that dialogue. Combined with the companion report, “[Sustainable Association Case Studies](#)”, that provides case studies of seven associations leading in this work, it is designed to stimulate discussions within associations on their role, mandate, and purpose. Associations and their members are encouraged to review these findings and engage boards and memberships on the questions contained therein. In so doing, Canada and the sectors, industries, and professions that make the country tick will be put on a more viable path for one and all.

**Report Terminology**

Associations use different terminology with their members. The terms in use by the studied associations include:

- UN Sustainable Development Goals (SDGs)
- Sustainability
- Sustainable Development
- Social Impact
- Social Purpose
- ESG (Environment, Social, and Governance)

This report uses the term “ESG”, as it is the simplest, referring to environmental, social and governance practices. However, other terms are used in the report when they have a specific intent.

## Report Highlights

- **Opportunities for all:** Associations of any size and type have many opportunities to engage members on sustainable practices to help them manage risks and seize opportunities for the future.
- **Visionary benchmark:** Associations can benchmark themselves along a continuum – from basic to strategic to visionary and finally to social purpose – to determine where they want to go and how to address gaps.
- **Strategic input:** The actions contained in this report can help inform an organization’s strategic plan and identity.
- **Overcoming barriers:** The main barriers of limited resources and budget, and of member interest and capacity, can be overcome.
- **Federal government role:** Associations can benefit from a stronger federal government role to support their progress, including providing resources and support, sharing research on social and environmental trends that will affect Canadian professions and sectors, incorporating sustainability criteria in government procurement, and raising the profile of leading sectors, industries, and professions domestically and globally.
- **Business case exists:** There is a strong business case for advancing member social and environmental performance, including managing risk, building resilience, enhancing public trust, fostering innovation, addressing stakeholder expectations, growing the sector/profession, and showcasing leadership.
- **Roadmap exists:** Sustainability practices can be laid out along a continuum of timing, effort and impact, to help associations identify gaps and opportunities and develop a roadmap for moving forward, called “Association ESG Strategy Roadmap”.
- **Societal purpose:** The “Association ESG Strategy Roadmap” reveals an opportunity for associations to rethink their core purpose beyond serving members, to include serving society, in which they help their sectors and professions refine their societal reasons for existence and clarify the greater good they contribute to advance society on a sustainable path.

## Report Structure

The report is organized into the following sections:

1. Introduction (2)
2. Methodology (5)
3. Best Practice ESG/SDG Hub for Associations (7)
4. Association ESG Strategy Roadmap (9)
5. Business Case (11)
6. Barriers and Opportunities (12)
7. Role of the Federal Government (14)

## ***Association leaders on the transition ahead and how The Sustainable and Just Association report can help.***

*“These are complex times and for many associations, it can be daunting to even know where to start when it comes to understanding and advancing its environmental, social, and governance objectives. The Sustainable Association provides approachable resources and tangible ideas that are relevant for every association, regardless of size and mandate. Written specifically for associations, it is accessible for all levels of leadership, providing inspiration and encouragement to start, continue, and accelerate action.”*

*Beth McMahon, CEO, Canadian Institute of Planners*

*“We stand at a crossroad; a point in time when all organizations need to be asking themselves, “Is this where we want to be and what we aspire to?” The Sustainable Association has created an exceptional framework to empower professional associations to accelerate their pace toward a just and sustainable future. This Roadmap provides practical steps to stimulate strategic discussions and overcome barriers.”*

*Gord Beal, Vice President, Research, Guidance and Support, CPA Canada*

*“Now more than ever before, consumers, businesses, government and the public at large are rightly focused on ensuring responsible practices are being prioritized and associations have an important role to play in ensuring their members are committed to high levels of ESG performance. The Sustainable Association’s report and Association ESG Strategy Roadmap provide valuable benchmarking tools comparing the work being done by associations to support sustainability. The report also includes important calls to action and provides practical tools that can be utilized by associations representing diverse interests while also sharing best practices that will both help to serve association members better and contribute to a better and more sustainable future.”*

*Pierre Gratton, President and CEO, Mining Association of Canada*

*“Our association has always viewed our mandate through the strategic lens of how our community as a whole can be impacted by our actions. Now, more than ever, it is incumbent on us to lead, educate and support our business community in what can be a sustainable, inclusive, equitable, and purpose-led recovery. The Sustainable Association guide can help us and other organizations lead the way into a resilient future.*

*Paul Holden, President and CEO, Burnaby Board of Trade*

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## About the Author

Coro Strandberg is a Canadian pioneer on the role of Business in Society. For nearly 35 years she has helped define the pathway for business to become a force for good. As a Corporate Director and Board Chair of Vancity Credit Union in the 1980s and 1990s, she helped position the company as a social purpose financial institution. She has supported over 100 businesses, governments, boards, and associations harness business and the economy to address societal challenges and put society on a sustainable path. She co-founded the Social Purpose Institute at United Way to accelerate the Purpose Economy and support businesses to develop and implement a social purpose as the reason they exist. Coro is a faculty member of Director's College and Governance Professionals of Canada, where she builds capacity of directors and governance professionals to provide oversight of organizational purpose and sustainable business models. In 2007, Coro wrote a similar study on [The Role of Industry Associations in the Promotion of Sustainability and CSR](#), which created an introductory roadmap for associations to become a force for good. This current study builds and extends upon this original vision. Coro shares her research and thought leadership on her website at [www.corostrandberg.com](http://www.corostrandberg.com).

### Future of Business in Society: Additional Resource

Just as associations are poised to play a leadership role to transition society to a sustainable future, so too are businesses. Check out this [Additional Resource Report](#) commissioned by the Canadian Government and written by the author, on the future role of business in society as envisioned by twenty thought leaders from around the world with expertise on the topic.

*Read about [The Future of Business in Society: Global Thought Leader Study](#).*

## Methodology

To better understand the role and opportunities of Canadian industry, trade, and professional associations to advance ESG among their memberships, the practices and insights of six national and one local association were studied, as follows:

1. Professional Associations
  - a. Canadian Institute of Planners
  - b. Chartered Professional Accountants Canada
  - c. Governance Professionals of Canada
2. Industry / Trade Associations
  - a. Burnaby Board of Trade
  - b. Canadian Chamber of Commerce
  - c. Colleges and Institutes Canada
  - d. Mining Association of Canada

These associations were chosen for this study as they have demonstrable ESG practices in place, which can be the basis for developing a rubric and roadmap for accelerating increased attention on this subject by other associations across Canada and beyond.

Four documents were the basis for the best practice scan and framework:

- [The Role of Industry Associations in the Promotion of Sustainability and CSR](#) (2007)
- [Industry Association Sustainability Benchmark and Checklist](#) (2013)
- [Social Impact Framework for Associations and their Members Tool](#) (2020)
- [Climate Change Guide for Industry and Professional Associations](#) (2020)

These tools and resources were tested, compiled, and updated to inform the ideas in this research paper.

From August to November 2020, scans were conducted of the seven associations to identify best practices, a best practice Hub was subsequently developed and the Association ESG Strategy Roadmap was drafted. The association representatives were interviewed for their ideas regarding the business case for advancing ESG among their members; the barriers and opportunities association face in doing so; and potential roles the federal government could play to accelerate ESG take-up among associations and their members. The interviewees also provided feedback on the two association tools contained in this report.

## Case Studies

Case studies of the seven associations studied for this report are available in this companion report “[Sustainable Industry Association Case Studies](#)”.

## Best Practice ESG/SDG Hub for Associations

This study produced a *Best Practice ESG/SDG Hub for Associations* that summarizes 17 practices associations can adopt to help their members advance on ESG priorities and prepare for the future.

**How it works:** The practices are divided into foundational and advanced actions in the internal and external rings, respectively. The internal practices are basic, easy wins, and necessary to have in place to get to the other practices. The inside practices are more controllable by the association and membership, and the outside practices address external conditions and create the enabling environment for accelerated ESG progress. The relationship of the foundational practices and the advance practices highlights the sphere of influence of associations have from their core audience to a much broader societal audience.

The innermost circle is directed at ESG and the SDGs (ESG/SDGs). An association can replace this with the term relevant to their sector or profession, such as Sustainability, Social Impact, or Corporate Social Responsibility. The Hub can be applied to both a suite of ESG topics, or to a single ESG topic, like climate change or diversity. In other words, associations can put any topic in the centre of the rubric to guide their ESG approach.

**How to use it:** Associations can use the Hub as a benchmark tool to identify achievements and prioritize gaps in their own approach to fill. It can be used by boards for strategic planning for those organizations seeking to become more strategic in their efforts. Boards can be asked what practices they would like to see pursued by their organization to further help their members advance on ESG. Once the organization has prioritized its efforts, they can be added to its strategic or operational plan.



# BEST PRACTICE ESG/SDG HUB FOR ASSOCIATIONS



## Association ESG Strategy Roadmap

The *Association ESG Strategy Roadmap* is a complementary tool for organizational leaders to assess their organization's current state and determine how far they would like to advance on ESG in the future.

**How it works:** The Roadmap captures a continuum of practices: from basic and opportunistic, to strategic and targeted, then visionary and collaborative, and finally, to the social purpose and transformational stage. Each is equated to a level – one through four – enabling organizations to better envision how far they would like to advance in the maturity model.

The lower levels of the Roadmap equate to those in the inner ring of the Hub (foundational practices) and its higher levels link to the outer ring (advanced practices).

The Roadmap is illustrative and not definitive, providing descriptions of different practices that are demonstrative of a developmental stage. Organizations typically have practices in more than one column and these practices will likely cluster around one or another level.

While the Roadmap may not fully apply to smaller organizations, it is certainly possible to make advances on all levels of the Roadmap. Progressing to higher levels is also possible, as not all require intensive resources and inputs. Likewise, the Roadmap may also be useful as a tool to understand which practices in the other levels might be possible to achieve through partnership and collaboration.

**How to use it:** As with the previous tool, this framework can be used by organizations and their boards in determining their strategic approach. Organizations can use it to decide where they want to be, how much more they want to do, and whether it is in their mandate to advance along the levels.

They could ask: is this where we want to be and what do we aspire to? The resulting discussion could be used to develop a framework to guide their approach, and help inform their strategic plan and identity as an organization.

## Association ESG Strategy Roadmap

Practice Area	Level 1 Basic and Opportunistic	Level 2 Strategic and Targeted	Level 3 Visionary and Collaborative	Level 4 Social Purpose and Transformational
<b>Operations and Strategy</b>	Includes ESG practices in its operations (i.e., improves its own social and environmental impacts)	Adopts ESG principles, policies, and definitions, and includes ESG in organization's values and workplan  Uses an ESG lens in decisions and projects	Develops and adopts ESG vision, goals, targets for members to pursue together, and includes them in organization's strategy	Adopts a societal [social] purpose as the reason the association/ sector/ profession exists
<b>Knowledge and Capacity</b>	Provides ESG information and education and includes ESG in member communications  Offers ESG related awards  Shares ESG case studies, success stories, tips, and tools	Provides information on ESG trends and risks  Develops and shares ESG toolkits and guidelines  Collects data and monitors ESG performance/progress of members and association	Develops ESG standards, benchmarks, designations, curriculum, rating systems, and codes of practice	Requires members to participate in ESG program/training as a condition of membership  Requires member ESG performance to be verified or assured by a third-party  Provides education on the business case, benefits, examples, and rationale for members to become purpose-driven  Develops toolkits and guidelines on social purpose and the role of members / the sector / the profession as social purpose actors
<b>Member Engagement</b>	Establishes time-limited ESG task forces for members to provide input; consults members on priorities	Creates longer-term ESG working groups for members to research and learn together	Creates ESG working groups for members to collaborate on ESG issues that can only be tackled through collective action	Supports its members to provide solutions to ESG / society's challenges
<b>Government and Stakeholders</b>	Engages in ESG advocacy with one or more levels of government	Engages in strategic ESG partnerships with government and other stakeholders	Initiates and engages in multi-stakeholder partnerships and collaborations to tackle ESG challenges  Conducts joint ESG R&D and pilots with value chain partners/ allied groups	Initiates coalitions to advocate for government ESG leadership  Engages other associations/allied groups to address ESG / societal issues together; mobilizes other sectors/professions on ESG  Initiates and participates in collaborations with aligned associations in all jurisdictions to

			Engages with aligned associations to advance collective ESG progress of sectors/professions	advance ESG and societal progress of sector/profession  Conducts government advocacy seeking measures to create the enabling conditions that advance a purpose-based economy
<b>Public Communications</b>	Profiles ESG related materials on its website	Provides ESG voice of sector/profession	Discloses ESG performance of sector/profession in annual reports	Inspires public action on ESG
<b>Staffing</b>	No designated ESG staff	Designated lead ESG staff	ESG designation on the leadership team; ESG related training provided to key staff members	CEO is ESG and social purpose leader; all staff have ESG and social purpose responsibilities

## Business Case

Associations have different motivations for furthering ESG best practices among their members. Here are fourteen reasons associations might be inspired to develop ESG programming for their membership.

Association Business Case for Advancing Member ESG	
<b>Risks</b>	Help the sector / profession anticipate and manage ESG trends, risks, and opportunities; build sector/profession resilience
<b>Reputation</b>	Build credibility, reputation, and public trust of sector / profession; build sector's social license to operate and grow
<b>Expectations</b>	Address investor, donor, client, and customer expectations
<b>Regulation</b>	Influence, forestall, and prepare for government regulation
<b>Funding</b>	Leverage and stimulate government funding
<b>Relationships</b>	Build positive government and stakeholder relations
<b>Goals</b>	Fulfill association mission, vision, and goals
<b>Members</b>	Meet member expectations, help advanced members go further and early-stage members get started
<b>Growth</b>	Attract and retain members; re-engage lapsed members
<b>Partners</b>	Attract partners who share the association's goals and can contribute funding, insights, expertise, and other capacity
<b>Employees</b>	Enhance association's employee recruitment and retention
<b>Leadership</b>	Show sector/profession leadership provincially, nationally, and globally
<b>Innovation</b>	Enhance innovation, save costs, and open market opportunities for members
<b>Responsibility</b>	Moral case

## Barriers and Opportunities

Associations face a range of barriers and challenges to start and advance ESG among their memberships. Below is a list of potential barriers<sup>1</sup>, most of which are confronted by organizations as they start to consider ESG in their work.

Barriers	Ways to overcome barriers
<b>Lack of association knowledge, resources, and budget</b>	<ol style="list-style-type: none"> <li>1. Think big, start small: set long-term ESG goals for the sector or profession, and work backwards from that goal by laying out a set of manageable steps, starting with quick, easy wins</li> <li>2. Build staff capacity, know-how, and commitment through education and performance management</li> <li>3. Engage passionate experts and organizations to bring in expertise and resources from outside the association; develop strategic relationships with them to maximize synergies</li> <li>4. Weave ESG into existing projects and initiatives rather than take on large new projects</li> <li>5. Build strategic partnerships and coalitions with key adjacent sectors or allied professions to tackle barriers and challenges together, share resources and best-practices, and advance innovation</li> <li>6. Advocate for and leverage government funding opportunities, identify government priorities and harness them, seek government partnerships for cost-sharing</li> <li>7. Seek out leader members who may be willing to fund collective research and develop the program</li> <li>8. Pool funding, share costs</li> <li>9. Re-prioritize other projects to free up funding and resources</li> </ol>
<b>Uninterested, unmotivated, and busy membership</b>	<ol style="list-style-type: none"> <li>1. Educate and engage members on ESG risks and opportunities through surveys, conferences, webinars, workshops, courses, and regular member communications</li> <li>2. Use peer-learning formats, e.g., discussion forums, knowledge-sharing, networking channels</li> <li>3. Amplify ESG best practices, including stories of leading members and international developments, creating a fear of missing out (FOMO)</li> <li>4. Use ESG awards and other recognition programs to inspire interest and encourage members to participate</li> <li>5. Offer education to executive leadership of members to stimulate interest and demand</li> <li>6. Look for and leverage leaders within the membership</li> </ol>

<sup>1</sup> Adapted from: <https://www.bccic.ca/climateguide/>



<b>Securing the buy-in and commitment of the association board and senior leadership</b>	<ol style="list-style-type: none"> <li>1. Educate the association's board of directors and leaders on ESG trends and imperatives for members; provide information on the national and global context and best practices</li> <li>2. Create profile and recognition opportunities for board leaders (president, vice-president, etc.) to speak to the association's ESG efforts before national and international counterparts</li> <li>3. Include ESG priorities in board and volunteer onboarding programs</li> <li>4. Recruit ESG member champions to promote the program to others</li> <li>5. Find common ground by highlighting the elements that everyone can get behind and support</li> <li>6. Align the project to association's existing vision, mission, and priorities</li> <li>7. Clarify the risks of inaction and the opportunities of proactive measures</li> <li>8. Recruit a committed member who has a strong link to the association's executive and board of directors to help make the case</li> </ol>
<b>Varying levels of ESG knowledge and competencies, and organizational size among members</b>	<ol style="list-style-type: none"> <li>1. Determine priorities based on consensus</li> <li>2. Provide ESG education, case studies, data, and benchmarking to members to provide an ESG foundation</li> <li>3. Ask more experienced members to mentor less experienced members</li> <li>4. Develop a list of quick-wins and easy steps to get members started</li> <li>5. Leverage the lessons and resources of other associations to build knowledge collectively, through sector-wide inter-association partnerships</li> </ol>
<b>Member capacity to take on new issues as expectations grow</b>	<ol style="list-style-type: none"> <li>1. Clarify and communicate the business case for new performance standards</li> <li>2. Promote the standard and performance guidelines to investors, donors, clients, and customers</li> </ol>
<b>Lack of demand outside of Canada</b>	<ol style="list-style-type: none"> <li>1. Promote the standard and performance guidelines to global investors and customers</li> <li>2. Engage government to promote the standards and best practices within other jurisdictions</li> </ol>
<b>Competition between members</b> <i>[Industry associations only]</i>	<ol style="list-style-type: none"> <li>1. Focus on pre-competitive issues, where collaboration can make a difference</li> <li>2. Identify and advance ESG issues where members are not competing</li> <li>3. Find common ground</li> </ol>

## Role of the Federal Government

The following is a list of potential roles the Federal Government can play to support industry and professional associations in furthering ESG best practices among their members. Fourteen roles are suggested supported by the feedback from interviewees. They are not in any order of importance.

Federal Government Role to Support Association ESG Programs	
<b>1. Resources</b>	Provide financial and program support to associations to help their members advance on ESG priorities
<b>2. Training and Reskilling</b>	Develop an ESG training program that provides resources and support to associations to reskill professionals and build ESG competencies
<b>3. Association ESG Network</b>	Provide resources to network organizations to create communities of practice on ESG topics for associations
<b>4. Trends Research</b>	Inform associations on global ESG trends, risks and opportunities, best practices, developments and standards, leverage Statistics Canada data; create a clearing house of relevant ESG information associations can access
<b>5. Collaboration</b>	Partner and collaborate with associations on ESG programs; convene multi-stakeholder dialogues and collaborations; match make associations on ESG topics, so they can collaborate and reduce duplication
<b>6. Global Marketing</b>	Market industry ESG leadership abroad, brand Canadian industries as ESG leaders, launch Canadian ESG brand, include ESG in Canada's trade and export strategies; conduct ESG trade missions to identify business opportunities and collaborations; work globally to set international ESG standards and to have Canadian standards recognized and adopted in other jurisdictions; provide funding for association travel used to support global adoption of ESG standards
<b>7. National Vision</b>	Create a vision for a sustainable future, convene associations and their members to address ESG/SDG priorities together
<b>8. National Commission</b>	Convene a blue-ribbon panel, task force, or commission to hear from Canadians on the role the federal government can play to help companies and associations advance on ESG and the SDGs
<b>9. Metrics</b>	Help develop comparable ESG metrics associations can use to measure, track, and compare progress
<b>10. Policy/Regulatory Framework</b>	Create incentives for participation, e.g., easier to obtain permits if industry ESG programs are followed; provide regulatory relief for companies that adhere to industry ESG programs; use ESG best practices to streamline regulations and inform regulation (e.g., performance-based regulation); require industry associations to have an ESG program to qualify for government funding
<b>11. Mandate Performance</b>	Adopt legislation to advance ESG performance of industry, including requiring ESG reporting
<b>12. Certification Systems</b>	Foster and incentivize the creation of certification systems to validate qualifying businesses
<b>13. Get House in Order</b>	Lead by example on ESG issues; include ESG in government procurement
<b>14. Communication Channels</b>	Create a one-window ESG approach, e.g., cross-government working group on ESG that associations can liaise with as a single point of contact within government