

An Association's Social Purpose: A Benchmarking Tool

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in collaboration with

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Introduction

Associations exist to serve their members. Many are now seeking to become a social purpose association, an association which exists to support its members to better serve society and the greater public good. This tool lays out the opportunity for all associations to consider how they support their members to serve society and sets out a roadmap for all associations to enhance their social and environmental programs. This will help sectors, professions and members become future-fit and ensure long-term well-being for all within nature's limits.

“Is your association ready to go to the next level as you and your members emerge from the COVID-19 pandemic? Here’s a tool to help you with that. It’s called the Social Purpose Association Continuum.”

The Social Purpose Association introduces a tool for associations to assess their readiness and interest in accelerating their social and environmental practices and consider becoming a social purpose association. The tool is called “The Social Purpose Association Continuum”. 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 set out in the Continuum.

It captures a range of practices: from basic and opportunistic, to strategic and targeted, then visionary and collaborative, and finally, to the social purpose and transformational stage. Each range represents a level – one through four – enabling organizations to better envision how far they would like to advance in their approach to becoming – or fulfilling their role as – a social purpose association. The Continuum 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 Continuum may not fully apply to smaller organizations, it is certainly possible for smaller associations to make advances on all levels. Progressing to higher levels is possible, as not all require intensive resources and inputs. Likewise, the Continuum may also be useful as a tool to understand which practices in the other levels might be possible to achieve through partnership and collaboration.

Your association could ask: Is this where we want to be? What do we aspire to? The resulting discussion will be beneficial in developing a framework to guide your approach and help inform your strategic plan and identity as an association.

About this Tool

The Social Purpose Association was developed by Coro Strandberg, President of Strandberg Consulting, and co-founder of the Social Purpose Institute at United Way. She is a national thought leader and advisor to accelerate a sustainable and just future for humanity and the planet by mobilizing business and associations as a force for good. www.corostrandberg.com

The Tool is based on research conducted for the federal government, called the Sustainable and Just Association. <https://corostrandberg.com/publication/the-sustainable-and-just-association/>

It was developed in collaboration with the Social Purpose Institute (SPI) at United Way, whose mission is to accelerate the Purpose Economy and Social Purpose in Business. www.socialpurpose.ca

Social Purpose Association Continuum

Instruction: Review these practices to identify what stage your association is at, first in terms of ESG and then in terms of social purpose. Then, consider if you would like to take your organization to the next level and/or what level makes most sense at this time. (ESG refers to environmental, social and governance practices. Alternative terms include sustainability, CSR (corporate social responsibility), as well as the United Nations Sustainable Development Goals (SDGs)).

Practice Area	Level 1 Basic and Opportunistic	Level 2 Strategic and Targeted	Level 3 Visionary and Collaborative	Level 4 Social Purpose and Transformational
Operations and Strategy	<ul style="list-style-type: none"> <input type="checkbox"/> Includes ESG practices in its operations (i.e., improves its own social and environmental impacts) 	<ul style="list-style-type: none"> <input type="checkbox"/> Adopts ESG principles, policies, and definitions, and includes ESG in organization’s values and workplan <input type="checkbox"/> Uses an ESG lens in decisions and projects 	<ul style="list-style-type: none"> <input type="checkbox"/> Develops and adopts ESG vision, goals, targets for members to pursue together, and includes them in organization’s strategy 	<ul style="list-style-type: none"> <input type="checkbox"/> Adopts a societal [social] purpose as the reason the association/ sector/ profession exists. Updates its vision and values to reflect its societal [social] purpose <input type="checkbox"/> Association’s strategy includes societal goals, targets and metrics for the association and the sector / profession to pursue together in fulfillment of its social purpose
Knowledge and Capacity	<ul style="list-style-type: none"> <input type="checkbox"/> Provides ESG information and education and includes ESG in member communications <input type="checkbox"/> Offers ESG related awards and honours <input type="checkbox"/> Shares ESG case studies, success stories, tips, and tools 	<ul style="list-style-type: none"> <input type="checkbox"/> Provides information on ESG trends and risks to members <input type="checkbox"/> Develops and shares ESG toolkits and guidelines <input type="checkbox"/> Collects member ESG data and monitors ESG performance / progress of members and association 	<ul style="list-style-type: none"> <input type="checkbox"/> Develops ESG standards, benchmarks, designations, curriculum, rating systems and codes of practice 	<ul style="list-style-type: none"> <input type="checkbox"/> Provides education on the business case, benefits, examples, and rationale for members to become purpose-driven <input type="checkbox"/> Offers social purpose awards <input type="checkbox"/> Develops toolkits and guidelines on social purpose and the role of members / the sector or profession as social purpose actors <input type="checkbox"/> Requires members to participate in ESG program / training as a condition of membership <input type="checkbox"/> Requires member ESG performance to be verified or assured by a third-party
Member Engagement	<ul style="list-style-type: none"> <input type="checkbox"/> Establishes time limited ESG task forces for members to provide input; consults members on priorities 	<ul style="list-style-type: none"> <input type="checkbox"/> Creates longer-term ESG working groups for members to research and learn about ESG topics together 	<ul style="list-style-type: none"> <input type="checkbox"/> Creates ESG working groups for members to collaborate on ESG issues that can only be tackled through collective action 	<ul style="list-style-type: none"> <input type="checkbox"/> Supports its members to provide solutions to ESG / society’s challenges
Government and Stakeholders	<ul style="list-style-type: none"> <input type="checkbox"/> Engages in positive ESG advocacy with one or 	<ul style="list-style-type: none"> <input type="checkbox"/> Initiates and engages in strategic ESG partnerships 	<ul style="list-style-type: none"> <input type="checkbox"/> Initiates and engages in multi-stakeholder partnerships and 	<ul style="list-style-type: none"> <input type="checkbox"/> Initiates coalitions to advocate for government ESG leadership

	more levels of government	with government and other stakeholders	collaborations to tackle ESG challenges <input type="checkbox"/> Conducts joint ESG R&D and pilots with value chain partners/ allied groups <input type="checkbox"/> Engages with aligned associations to advance collective ESG progress of sectors / professions	<input type="checkbox"/> Engages other associations to address ESG / societal issues together; mobilizes other sectors / professions on ESG <input type="checkbox"/> Initiates and participates in collaborations with aligned associations in all jurisdictions to advance ESG and societal progress of sector / profession <input type="checkbox"/> Conducts government advocacy seeking measures to create the enabling conditions that advance a Purpose Economy ¹
Public Communications	<input type="checkbox"/> Profiles ESG related materials on its website	<input type="checkbox"/> Provides ESG voice of sector / profession	<input type="checkbox"/> Discloses ESG performance of sector / profession in annual reports	<input type="checkbox"/> Inspires member and public action on ESG
Staffing	<input type="checkbox"/> No designated ESG staff	<input type="checkbox"/> Designated lead ESG staff	<input type="checkbox"/> ESG designation on the leadership team; ESG related training provided to key staff members	<input type="checkbox"/> CEO is ESG and social purpose leader; all staff have ESG and social purpose responsibilities

What is a Social Purpose Association?

A social purpose association is an association whose raison d'être is to create a better world. A social purpose association has a North Star that sets out why the association exists – the greater good it aspires to. It goes beyond a mission statement (what it does or how it does it), and a vision (where it is headed). It is the association's quest, enduring reason for being, forever pursued. A social purpose association serves its members to better serve society and be a force for good in the world.

Why Become a Social Purpose Association?

These are some of the benefits of becoming a social purpose association.

Enhance relevance with members, stakeholders, and society	Create a future-fit organization and profession / sector	Address rising expectations of investors, clients, donors, customers, and employees
Build public trust of sector / profession	Attract and engage members and partners; leverage our reach and influence	Demonstrate sector / profession leadership; raise association brand and profile

¹ A Purpose Economy is an economy powered by the pursuit of long-term well-being for all in which business and regulatory and financial systems foster an equitable, flourishing, resilient future.

What is the Difference Between a Mission, Vision and Purpose?

Many associations have pre-existing mission and mandate statements under which they have successfully operated for many years. Becoming a purpose-driven association involves a decision to determine “why” the organization exists and “why” the organization pursues its mandate. Leading associations are uncovering their core purpose and using this to set their strategic course. Here is where a purpose fits in:

- **Mission:** What your organization does and how it does it.
- **Vision:** Where your organization is headed.
- **Purpose:** Why your organization exists.
- **Social Purpose:** The societal reason your organization exists.

How to Determine a Social Purpose for Your Organization?

Here are some questions you can use in a strategy session to brainstorm the societal reason our association exists:

- What **greater role** do you believe our association can play in the world?
- How might we contribute to the **greater good** through our association?
- What is the **societal benefit** of our current mandate? How does our current mandate benefit humanity/the world/our jurisdiction?

What are the Implications of Becoming a Social Purpose Association?

These are some of the ways in which becoming a social purpose association might affect your organization:

- **It will inform strategy:** The organization sets strategic goals and deliverables to further its social purpose.
- **It will inform culture:** It shapes how the organization behaves.
- **It will inform decisions:** It becomes a lens in decision-making, helps set strategic priorities and guides daily decisions.
- **It will inform partnerships:** The organization partners and collaborates with others in its ecosystem to further its social purpose.

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