

Association ESG Roadmap

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Introduction

The *Association ESG Roadmap* is a tool for association leaders to assess their organization's current ESG state and determine how far they would like to advance on ESG in the future. It was originally published in "[The Sustainable and Just Association: The Role Associations Can Play to Help Their Members Accelerate a Just and Sustainable 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 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: 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 ROADMAP

PRACTICE AREA	LEVEL ① <i>Basic and Opportunistic</i>	LEVEL ② <i>Strategic and Targeted</i>	LEVEL ③ <i>Visionary and Collaborative</i>	LEVEL ④ <i>Social Purpose and Transformational</i>
Governance, Strategy and Operations	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 and implements a societal [social] purpose as the reason the association/ sector/ profession exists
Knowledge and Capacity	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
Member Engagement	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
Government and Stakeholders	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 advance ESG and societal progress of sector/profession Conducts government advocacy seeking measures to create the enabling conditions that advance a purpose-based economy
Public Communications	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
Staffing	No designated ESG staff	Designated lead ESG staff	Leadership team has designated ESG position; ESG related training provided to key staff members	CEO is ESG and social purpose leader; all staff have ESG and social purpose responsibilities