

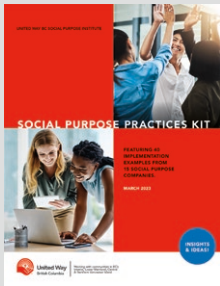
SOCIAL PURPOSE PRACTICE

Roadmap

Have a plan to implement your social purpose



**INSIGHTS
& IDEAS!**



SOCIAL PURPOSE PRACTICES KIT

This Purpose Practice is one of 11 Practices in the Social Purpose Practices Kit featuring 40 implementation examples from 15 social purpose companies. The Social Purpose Practices shown below are based on the [United Way BC Social Purpose Implementers program](#) and the experience of the companies who went through it.

Check out the complete [Social Purpose Practice Kit](#) to gain insights and ideas on how to meaningfully, authentically, and impactfully realize your social purpose ambition!

PLAN	EMBED	ENGAGE
<ul style="list-style-type: none">➔ Roadmap➔ CSR/ESG Transition➔ Product Transition➔ Process Metrics➔ Impact Goals	<ul style="list-style-type: none">➔ Values➔ Decision Lens➔ Employee Lifecycle	<ul style="list-style-type: none">➔ External Communications➔ Customer Lifecycle➔ Stakeholder Transformation



United Way
British Columbia

Working with communities in BC's Interior, Lower Mainland, Central & Northern Vancouver Island

UNITED WAY BC SOCIAL PURPOSE INSTITUTE

SOCIAL PURPOSE PRACTICE

Roadmap

Have a plan to implement your social purpose

A social purpose company adopts a social purpose roadmap to guide its early social purpose journey. The roadmap sets out the steps and timeline for embedding the social purpose into the organization over six months or more.

WHY ADOPT THIS PRACTICE?

It is critical to long-term success to have a plan to guide your approach to implementing your social purpose. This will help keep you on track and ensure others in the company know the plans to embed the social purpose across the company's operations. The roadmap can be used to inform the employee communications critical to building awareness, support, and buy-in.

WHEN TO ADOPT THIS PRACTICE?

Your company should put its social purpose roadmap together prior to adopting its social purpose, or just after. The earlier the better.

INSTRUCTION

Hold a meeting with key staff to explore what you are doing now and what you could be doing to activate your social purpose. Consider what to keep doing, start doing and stop doing. Use these ideas to create a timeline or roadmap to guide your approach.

Review the following examples for inspiration and ideas for your own approach. Note that every company will have a unique implementation plan. For a comprehensive roadmap or timeline, review and prioritize all the practices in the [Social Purpose Practices Kit](#).

FEATURED PRACTICES FROM

BC Lottery Corporation

We exist to generate win-wins for the greater good. Corporate.bclc.com



Community Savings Credit Union

We exist to unite working people to build a just world. Comsavings.com



IMPLEMENTATION EXAMPLES

BC Lottery Corporation developed its Social Purpose Roadmap in two steps. First it asked itself these questions.

ACTION QUESTIONS

1 How can we better communicate our Social Purpose?

As Leaders

- Provide more frequent in-person updates at organizational meetings

As A Team

- Focused presentations and presentations with other companies to share information across the organization on what others are doing in this space
- Incorporate Social Purpose into team discussions/communications with each division

As an Organization

- Provide examples of what Social Purpose means for each division in the organization
- Demonstrate how Social Purpose impacts all areas of the business including vendors, players, & all supply chains.

ACTION QUESTIONS

2 What are we doing well on our Purpose now?

As Leaders

- Providing resources and information to our SPA's - they are then able to share peer-to-peer (SharePoint document sharing)
- Including key staff/groups in sessions to gain feedback in Social Purpose journey
- Inclusion & engagement in the development of our Social Purpose
- SPA's educating peer-to-peer UWSPi training

As a Team

- Communication & updates for the organization including key members/groups
- Monthly updates on Internal communications intranet pages including animated stories of SPA's

As an Organization

- Transparent on our progress
- Collaborating on the development of the roadmap
- Setting baseline with employee engagement survey questions (3 statements)

IMPLEMENTATION EXAMPLES

BC Lottery Corporation Social Purpose Roadmap Questions, cont.

ACTION QUESTIONS

3

What are we doing on our Purpose now that we could do better?

As Leaders

- Training and sharing where teams can help make a difference

As a Team

- Clearer timelines, next steps, and expectations of all levels of the organization
- Expectations of Senior Leadership Team across organization to embrace, advocate Social Purpose into meetings & decisions

As an Organization

- Provide tangible examples on how employees can contribute and bring SP to life
- More updates
- Pulse checks to see if we are changing our culture to an SP organization

ACTION QUESTIONS

4

What are we not doing on our Purpose that we could be doing?

As Leaders

- Bring together working groups (CoP) in mentorship/coaching programs for our SPA's
- Sharing stories for BCLC's Social Purpose transformation

As a Team

- Sharing our journey & how our SP is different from giving back to the Government with potential examples to create the abstract more tangible

As an Organization

- Lots of momentum at the beginning of the journey – feels lost a little how do we keep the engagement up & regain the momentum.

IMPLEMENTATION EXAMPLES

BC Lottery Corporation Social Purpose Roadmap Questions, cont.

ACTION QUESTIONS

5 What should we stop doing as it gets in the way of our Purpose?

As Leaders

As A Team

As an Organization

- Stop doing - Long PPT decks. Paint the picture of the future BCLC, create compelling reasons for change to galvanize the organization to get behind our Social Purpose

ACTION QUESTIONS

6 What actions do we need to take to bring our Social Purpose to life?

As Leaders

As A Team

As an Organization

- Have SPA's with support of Team Leads present to organization
- Respond to individuals when reaching out with interest in our SPA program
- Ensure passionate individuals are included, not hand picked
- Ensure SP is part of all new initiatives we are considering across the organization
- Business Planning has SP built into the criteria and/or considered in the process
- Making decisions with our purpose in mind – a truly overarching strategy
- Have SP part of every individuals business objectives in their performance yearly reviews

IMPLEMENTATION EXAMPLES

Then BCLC put its actions together in this Social Purpose Roadmap.

Y1

Awareness and Capacity-Building

Year 1: focus on internal education and alignment and integration.

- Social purpose narrative defined – what it means, how it will drive growth, opportunity and impact
- Employee Engagement: facilitate social purpose workshops to all employees with the goal of building capacity and awareness
- Internal Communications Strategy: ongoing updates and education on social purpose journey and milestones achieved

Y2

Social Purpose Integration

Year 2: continue focus on internal engagement and embedding purpose into corporate strategy and begin external communications.

- Finalize BCLC brand promise and development of marketing strategy
- Social purpose embedded in future staff engagement surveys
- Employee education and onboarding training module created
- Stakeholder governance finalized
- Update to corporate strategy and vision to address purpose
- Business unit-level policy changes and metrics identified
- ESG Framework developed
- Product transformation review begins

Y3

Operational Planning & Business Model Alignment

Year 3: focus on operational planning and the continuation of external engagement.

- Measurable improvements identified through staff engagement survey
- Finalize social purpose KPI and metrics
- New customer value proposition identified
- External social purpose communications executed
- Product transformation continues
- Stakeholder engagement program for purpose collaboration defined
- Vision and new corporate strategy finalized

Y4

Impact Generation

Year 4: evaluation and measurement of internal, external and social impacts.

- Measurable improvements identified through employee engagement survey and stakeholder engagement programs
- Product transformation complete and roadmap created
- Demonstrated and measurable value created for players (customers)
- Disclosure of purpose progress in integrated report

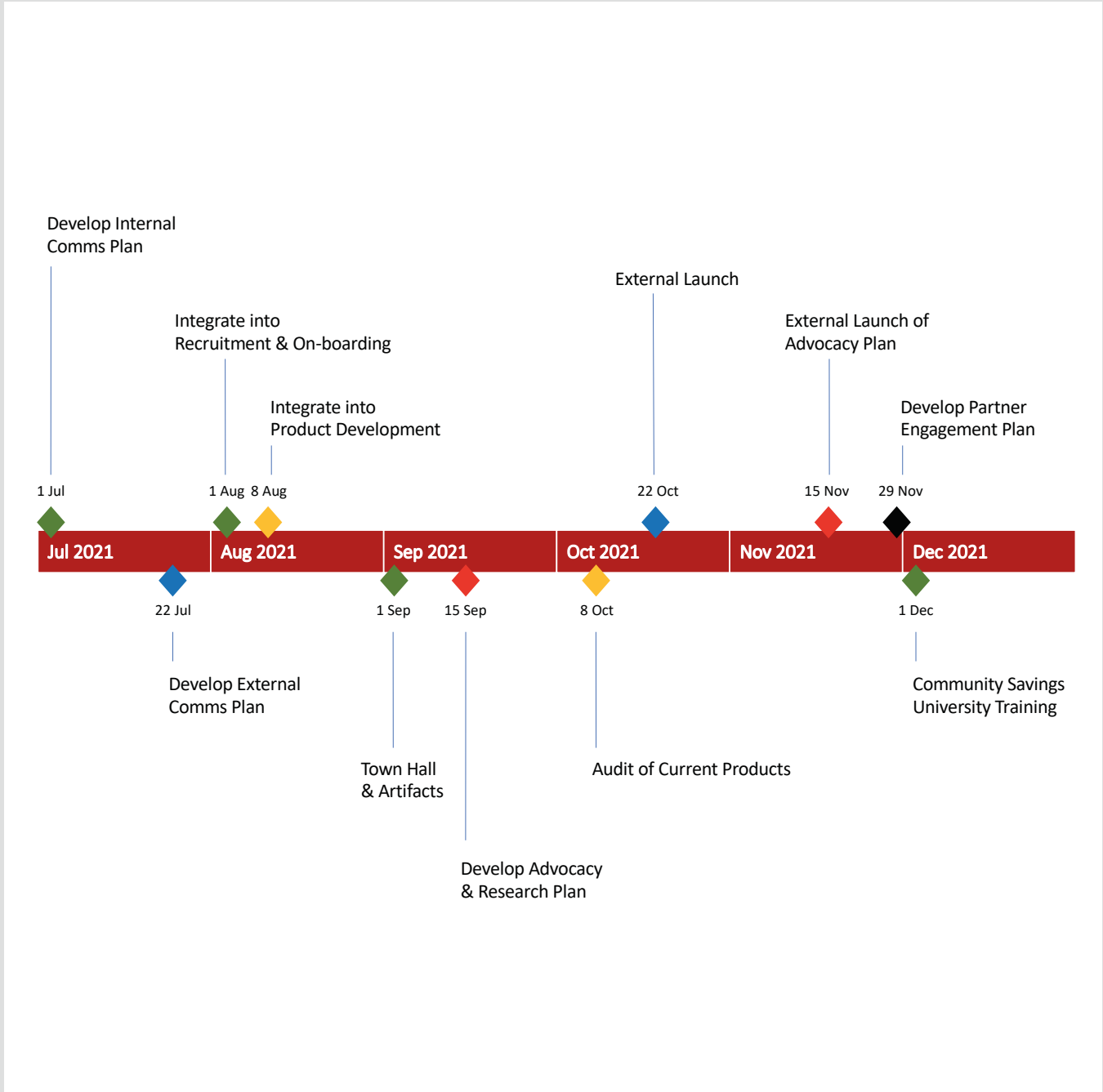
IMPLEMENTATION EXAMPLES

Community Savings developed its Social Purpose Roadmap in two steps. First it asked itself these questions.

QUESTIONS	AS LEADERS	AS A TEAM	AS AN ORGANIZATION
What are we doing well on our Social Purpose now?	<ul style="list-style-type: none"> Bringing together the strings of our various initiatives with our social purpose Introducing social purpose to all new staff as they join the credit union Purpose quoted as part of media engagement 	<ul style="list-style-type: none"> Align our team volunteering program to social purpose 	<ul style="list-style-type: none"> All team members know and understand our purpose Developed specific products in line with our social purpose (Support Line of Credit) Advocacy work on Community Benefit Agreements and with BC Women’s Health Foundation Purpose statement within external publication ‘Buy union’ mandate
What are we doing on our Social Purpose now that we could do better?	<ul style="list-style-type: none"> Actively and consistently communicate about its importance Reengage team to listen to their opinions on social purpose 	<ul style="list-style-type: none"> Leveraging our individual communities to promote advocacy work Team members to discuss social purpose with credit union members 	<ul style="list-style-type: none"> Auditing our products and services to align with purpose Fully entrenching our social purpose in our branding and marketing/ service models including but not excluded to: general website messaging, new membership acquisition Leveraging our social media/other platforms to promote advocacy work Develop an external communication plan on social purpose
What are we not doing on our Social Purpose that we could be doing?	<ul style="list-style-type: none"> Systematically communicate purpose: screensavers; beginning of all Town halls, educate managers to include social purpose in their day2day, team meetings etc. Leveraging personal social media platforms to promote advocacy work Develop an internal communication plan on social purpose Leveraging professional network to create social purpose links with other organizations 	<ul style="list-style-type: none"> Leveraging our individual communities to promote advocacy work Team members to discuss social purpose with credit union members 	<ul style="list-style-type: none"> Auditing our products and services to align with social purpose Fully entrenching our social purpose in our branding and marketing/service models including but not excluded to: general website messaging, new membership acquisition Leveraging our social media/other platforms to promote advocacy work Develop an external communication plan on social purpose
What should we stop doing as it gets in the way of our Social Purpose?	<ul style="list-style-type: none"> Focus on / drive efforts that will have a tangible/ measurable impact in line with our social purpose 	<ul style="list-style-type: none"> Focus on / drive efforts that will have a tangible/ measurable impact in line with our social purpose 	<ul style="list-style-type: none"> Limit the support we give to non-aligned causes

IMPLEMENTATION EXAMPLES

Then, it put its actions together in this Social Purpose Roadmap.



ABOUT THE UNITED WAY BC SOCIAL PURPOSE INSTITUTE

The United Way BC Social Purpose Institute (UW SPI) exists to grow business for good, partnering with companies and collaborating with governments, allied organizations, and others to grow the Social Purpose Business movement. We help businesses define and implement their social purpose to drive both business growth and societal good and champion a purpose-led economy, accelerating the new business ethic to create long-term well-being for all. Together, we build a better world through business.

For more information, visit us at www.socialpurpose.ca

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ABOUT THE AUTHOR

Coro Strandberg is Social Purpose Advisor to United Way BC. She helped create the United Way BC Social Purpose Institute. She has over 30 years experience helping businesses become a force for good and is a national thought leader on social purpose business.

www.corostrandberg.com

The United Way BC Social Purpose Institute is honored to operate as guests on the unceded and traditional territories of the Coast Salish Peoples, the x̱məθḵəy̱əm (Musqueam), Skwxwú7mesh (Squamish) and səilwətaʔ /Selilwitulh (Tsleil-Waututh) Nations.



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