



Western Talent & Innovation Review

From Here to There: Insights from Soul Forum 2018's Executive Roundtable

Angie Redecopp
Yvonne Jeffery

Editor's Note: This article is published as part of the joint [Soul of the Next Economy Forum](#) (SNEF) and *Western Talent & Innovation Review* Special Edition. The SNE Forum is held in Calgary Alberta each fall and is where business, the non-profit sector, government, and educational institutions converge to change the way we do business and impact society. The article below was written by an attendee of the September 2018 Forum.



Abstract

Talent and innovation are critical components of businesses positively impacting society. This article sets out a research framework used to work with change, focusing on present state, future vision, and how to move from 'here to there.' This framework is used to structure the results of roundtable feedback from Soul of the Next Economy Forum 2018. The roundtable included discussions on the continuum of responsible business within organizations, turning 'doing business like a Canadian' into a competitive advantage, and practical challenges and issues as we innovate for good.

Talent and innovation are key to changing the way we do business and impact society. For the past five years businesses, non-profits, government, educators, and students have come together at Soul of the Next Economy Forum at Ambrose University, in Calgary, Alberta, to learn, connect, and engage on these issues and others. This article sets out key learnings from the Executive Roundtable that started off Soul Forum 2018, and organizes these learnings using a specific framework. You can learn more about the Executive Roundtable, which included over

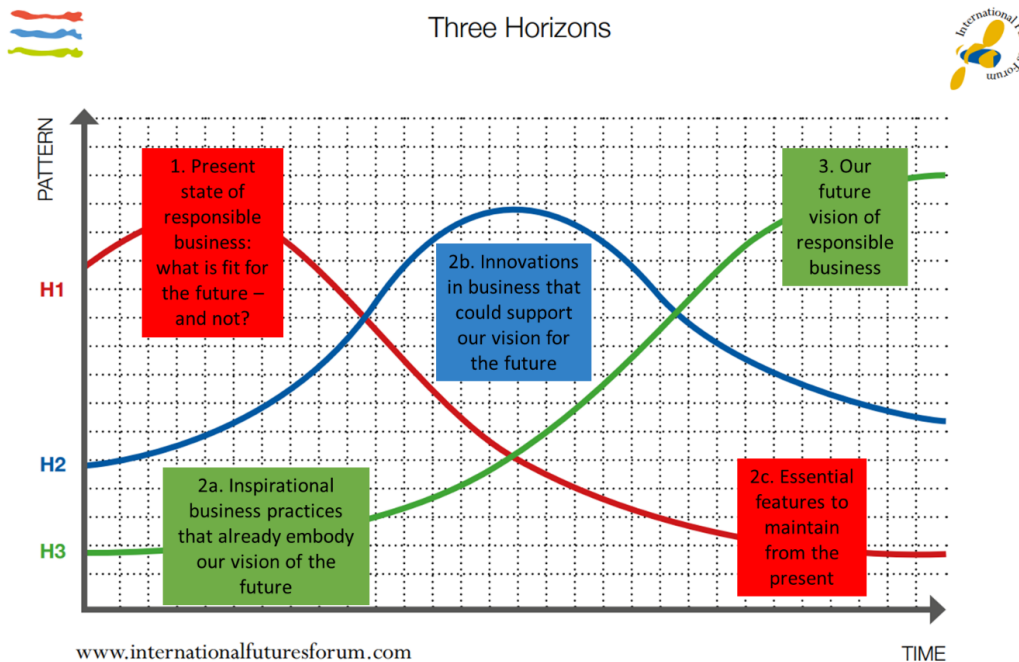
225 business and community leaders and Soul Forum attendees, and other Soul Forum 2018 events, some of which will be referenced herein, in the [2018 Forum Review](#). It is hoped that organizational leaders, HR Practitioners and others looking to change their organizations for the better will both be challenged and inspired by these collective insights.

The Executive Roundtable consisted of 27 tables of 6-8 people, each with a moderator and a recorder. Participants were advised that data was being recorded and would be collated, analyzed, and shared. Data recorded was provided to the authors who then organized and analyzed it using the framework described below.

Research Framework: Three Horizons

Our research objective is to pull together Executive Roundtable feedback into key themes using the Three Horizons model, a versatile strategy framework that can be used by a variety of organizations. We also refer to other content from the Forum and other resources that readers may find helpful as we discuss the different findings.

Hosted online by the International Futures Forum (IFF)¹, Three Horizons is described by author and IFF member Bill Sharpe as “a way of working with change...a foresight tool”² that focuses on systemic-level views of change. While it is often used as a research method to encourage discussion and engagement, we are using it here as a framework to structure the results of our Executive Roundtable feedback. As such, it provides a way of looking at our existing state and the case for change (Horizon 1), our desirable future state (Horizon 3), and the challenges and opportunities that will take us from the present to the future (Horizon 2). We have overlaid our questions and practical interpretation (represented by the coloured boxes) on IFF's Three Horizons framework as follows:³



We grouped the Forum attendees' feedback as follows:

Horizon 1 – Present State: Where is responsible business situated now?

Horizon 3 – Future Vision: Where do we wish to see responsible business in the next five to 10 years?

Horizon 2 – From Here to There: What do we need to do to get from H1 to H3?

Inspirational Practice: What inspirational business practices exist today that embody our vision of the future?

Innovations in Business: What innovations hold promise or are needed for H3?

Essential Features: What should we keep from H1?

The following table provides a key to this grouping, based on the questions that were asked in the Executive Roundtable discussions:

Question	Horizon				
	1	3	2a	2b	2c
Where is responsible business situated in your business (or businesses that you work with): compliance, part of business strategy or part of the purpose of the business?	✓				✓
What motivates responsible business practices in your business (or businesses that you work with): employee interest, top leadership, public pressure, laws, competitive pressures or something else?	✓				✓
What is shifting in your industry with respect to responsible business and what do you hope to see shift in the near future? How can we as individuals support this shift?			✓	✓	
Which of the values proposed by CBSR – collaborative, eco-conscious, ethical, gender-balanced, globally minded, inclusive, innovative, purpose-drive – most align with your company or organizational values?	✓	✓	✓	✓	✓
How is or could “doing business like a Canadian” serve as a competitive advantage for Canadian companies?		✓	✓	✓	
What would you change or add to these values in order to be representative of all Canadians and how they aspire to do business?			✓	✓	
What is your biggest challenge right now in seeking to do business better?	✓				
What are some examples in your industry of how challenges in being both profitable and responsible have been overcome?			✓	✓	
How can innovation serve to advance responsible business in your organization or business?				✓	

Horizon 1: Where is Responsible Business now?

First, we will consider themes from the Roundtable that focused on where responsible business is now. We will focus specifically on how responsible business is framed within various organizations, what we are seeing more of generally, and influencers.

In terms of how responsible business is framed within organizations, Forum attendees talked about the need to 'go beyond the concept of not doing harm to doing good.' This is supported in the SDG Compass⁴ guide for businesses, referenced in the Forum SDGs session. This guide differentiates between baseline responsibilities for businesses, including the United Nations Guiding Principles on Business and Human Rights, and the 2015 Sustainable Development Goals (i.e. doing no harm vs. doing good). Others offered a reality check though, noting that many companies are still figuring out how to avoid harm through their supply chain activities and other business practices. Related to this, conversation arose on responsible business being more than philanthropy, which has been a repeated Soul Forum topic.

Forum attendees also contrasted responsible business being framed as a part of brand strategy versus business strategy. We will talk later about the continuum or journey from compliance to strategy and purpose, but we do see many examples of responsible business being associated with building a brand. For example, Nike's Colin Kaepernick advertising campaign seems to have increased its customer base,⁵ and Gillette's 'the best men can be' advertising campaign is still receiving mixed reviews.⁶ Moving towards business strategy (and purpose), Maple Leaf Food's Lynda Kuhn gave Forum attendees a clear example of building an entire business strategy on responsible business.

A variety of topics were raised on what we are seeing more of generally in the responsible business realm. As examples, some discussed non-profits adopting business principles, also referred to in the Eliane Ubalijoro's keynote, and from the other direction, the increase in social enterprise models in business. As will be discussed later, several examples of 'purpose-driven' businesses were raised. Some negative trends were also observed – the concentration of power in the hands of a few corporations,⁷ and the slow movement in the area of waste management for most organizations, as examples.

Industry associations were also discussed, which can be thought of in terms of broad-reaching organizations like Canadian Business for Social Responsibility⁸ (CBSR, co-host of the 2018 Roundtable) or Global Compact Network Canada⁹ (GCNC, Helle Bank Jorgenson – President, speaker at 2016 Soul Forum), or more sector-focused associations and industry initiatives like the Extractives Industry Transparency Initiative¹⁰ and the responsible sourcing initiatives out of the Retail Council of Canada.¹¹ Local broad-reaching organizations and initiatives continue to be present at the Soul Forum – Canadian Poverty Institute¹² and Vibrant Communities Calgary's Enough for All strategy¹³, as examples. Finally, attendees raised industry certifications as becoming more prevalent in the responsible business realm. Perhaps a topic for a future Soul Forum, NYU Stern's Centre for Business and Human Rights offers an interesting perspective on certifications, and measurement more broadly in terms of social factors, suggesting that existing measurement tends to focus on what is most convenient and is typically inconsistent.¹⁴

To close out Horizon 1, several discussions ensued on the topic of influencers, particularly in response to the question on 'what motivates responsible business practices in your business.' Direct influences on companies include investors, customers, and employees. Attendees referenced capital providers moving to incorporate the Principles for Responsible Investment¹⁵, BlackRock's annual open letters to CEOs as a prime example, with the 2019 letter again emphasizing that "society is increasingly looking to companies, both public and private, to address pressing social and economic issues."¹⁶ Financial advisors at the tables also emphasized the increasing interest in socially responsible or purpose-driven investments, and the increasing supply of investment products meeting this demand. Of interest, responsible investment represented 50.6% of Canada's investment industry in 2018, up from 37.8% in 2016.¹⁷ Looking at customers, one attendee observed that "demand will dictate responsible business practices where consumers are more aware of the origin of the products they purchase. Unethical business practices will lose the consumers ... and suppliers will also consider those with whom they will associate." A challenge raised here though was transparency – customers need to know what a company believes and is actually doing in order to

determine if there is alignment. Several comments were made on employees as drivers for responsible business, with some interesting comments and opinions pertaining to millennials and baby boomers, both of whom were represented in the Soul Forum audience. To offer one summative perspective, millennials often come with individual passions and baby boomers the practical know-how to turn passion and purpose into business strategy.

Looking outside the business, observations were made on the increase of responsible business curricula and initiatives in post-secondary business education, with most of Calgary's business schools represented at the Forum by staff, faculty, and students. Forum host, Ambrose University, is looking at how it can bring this focus to the high school business elective classroom in collaboration with its sister programs in the city. The University of Calgary's Hunter Hub, Mount Royal University's Institute for Community Prosperity, and Bow Valley College (all Forum supporters or advisors), are also focusing attention on how post-secondary institutions can collaboratively influence business and continue to make responsible business central for Calgary and area university students. Social media was also referenced as a growing external influencer on businesses, with the observation that these communication outlets are not necessarily synonymous anymore with truth or transparency. Finally, government regulation, or even the possibility of government regulation, was highlighted, with references to possible supply chain legislation in Canada (which was presented on at Soul Forum 2017 by World Vision Canada)¹⁸ and discussions on procurement initiatives at the city level, which was further expanded on by REAP in the Innovation in Development session.

Horizon 3: Where do we wish to see Responsible Business in the future?

There were many ideas surrounding where we want responsible business to be in the future. Some of the key ideas were along the themes of purpose-driven business, integrating responsible business throughout the organization, and collaboration.

Google 'purpose-driven business' and you will find blogs, news stories, web stories, academic articles, and more. As one example, a Harvard Business Review article delves into a case study on a 'higher purpose' reflecting something more aspirational than economic exchanges.¹⁹ One Forum attendee described responsible business in the future as a "sense of business as driven by mission, purpose, values, strategy – doing business like a human being." Servus Credit Union (Forum supporter since inception) talked about their 'noble purpose' and how this has moved from a CSR initiative to a business strategy across the entire organization.²⁰ The question that arises, which will be discussed below under Horizon 2 and was considered in the context of CBSR's #dobusinesslikeaCDN values, is the values or purpose on which a company should focus. Related to this is when such a purpose needs to be initiated – does it have to be a new enterprise or major reorganization, or can this be incremental?

Much of the discussion on where we want to be in the future focused on the integration of responsible business throughout the organization. The vision articulated by various Forum attendees includes leadership vision and support, staff empowerment at all levels, supply chain involvement and impact, knowledgeable and motivated consumers, and stakeholder input. Overlapping with how we get there, it was articulated that in the quest for sustainability, businesses need to begin with an end goal and work backwards, with measurement to align tactics and sustainability. Some suggested that integration challenges can vary by organization – on the one hand it may be hard to integrate through many layers or departments in a large organization, but resources may be lacking in a smaller business.

Communication was also identified as a challenge. Policies and initiatives are decided at the high level, but the message can get lost as it is communicated down through the levels of the business. It was also pointed out that conflicting messages abound when departments need to answer to budgets and key performance indicators that do not reflect or factor in responsible business policies and initiatives. This is where the integration comes in – while communication is a challenge, integrating responsible business policies should not be any different than any other business direction or focus. Those without a responsible business focus might argue that business strategy needs to focus on increasing share value, but most Forum attendees argue (or would likely argue) that responsible business

can enhance share value on the one hand, and that business has purpose which goes beyond share value on the other hand.

Collaboration is a theme that continues to be emphasized at the Soul Forum – both through the programming and the Roundtable and other discussions. The mission of the Soul Forum is to be where ‘business, the non-profit sector, government, and education institutions converge to change the way we do business and impact society.’ Several stories were shared this year, both at the Roundtable and otherwise, on collaboration – serving both as concrete examples and aspirations for the future for other organizations. We learned about Kleos Microfinance Group working with the business community,²¹ Alberta International Development Office²² (Government of Alberta) leveraging the public sector to support the private sector, educational institutions, and civil society organizations pursuing international development projects,²³ Mountain Equipment Co-op embracing change and building community,²⁴ and Enbridge collaborating among its own business units in its approach to energy efficiency.²⁵

Collaboration among the different sectors represented at the Soul Forum is not easy. One challenge identified was language – businesses, non-profits, governments, and academics do not all speak the same language. The SDGs continue to be identified at the Soul Forum as a common language that can be used for all of these sectors. This was addressed by Rotary representatives in the SDGs session, and Rotary (Soul Forum co-founder) recently announced its 2019-20 presidential theme, ‘Rotary Connects the World,’ which includes its relationship with the United Nations and the SDGs.²⁶ In her keynote address at the Roundtable, Maple Leaf’s Lynda Kuhn talked about intentionally seeking opposition, often from the NGO community, as the company pursues its vision “to become the most sustainable protein company on earth.”²⁷ Maple Leaf is seeking to learn the language of others.

Horizon 2: What needs to shift – and is shifting – to move Responsible Business to Horizon 3?

In this Horizon, we see the potential embodied in the present as it also begins to shape the future. A recurring theme is the pull between those who see the need for revolutionary change in business and those who see the process as evolutionary. As mentioned in Horizon 1’s discussion, this can most easily be imagined as a continuum, with slow, steady evolution toward one side and revolutionary change toward the other, and gradations of progress between them.

Maple Leaf and Unilever have both redesigned their business model in a process that may have begun as incremental change, but became a purposeful redesign. Lynda Kuhn from Maple Leaf Foods – which has branded its vision with the tagline, “Raise the Good in Food”²⁸ – expressed their approach as maximizing shared value rather than shareholder value, moving from company strategy to company purpose, using a proactive approach that aligned with consumers, promoting new markets and loyalty, rather than with government regulation on animal sustainability.²⁹ Unilever created the Unilever Sustainable Living Plan eight years ago, moving its incremental progress further toward revolutionary, with a dual purpose of “making sustainable living commonplace” and “changing the way the world does business.”³⁰

It is, perhaps, simpler for a social start-up to establish itself as a responsible business from the beginning, as Conscious Brands (past Soul Forum presenter) has done. As a Certified B Corporation, its aim is to guide others on the sustainability journey, which they define as “when your business thrives in harmony with the environment and society in which it operates.”³¹ However, in the Roundtable discussion, and in Lynda Kuhn’s keynote, we learned that revolutionary change requires a start-up culture regardless of where the company is on its business strategy. We also learned that one of the biggest challenges is the question of financial versus social return. Leor Rotchild (Roundtable host and executive director of CBSR, discussed below), says companies can have both and asserts that “CSR activities do in fact translate into improved economic performance.”³² Some of the Forum attendees would agree, while others suggest that there are trade-offs to be made.

Navigating the Horizons: Three Key Questions

We have three areas to address as we navigate Horizon 2: what should we keep from Horizon 1, what inspirational business practices already exist that we should support, and where are innovative practices holding promise or needed in order for the Horizon 3 vision to be fully realized?

What are the essential elements that should we keep from Horizon 1?

Many of the current motivators for responsible business are elements that Forum attendees identified as positive and worth nurturing. Pressure or influence from various stakeholder groups, for example, is growing. In turn, responsible business is increasingly focusing on those stakeholders – voices both external and internal to the business – to ensure that their needs are met. In the words of one respondent, this is a way to “tie the motivators into the solutions.” Cultural demographics – the generational impact of baby boomers retiring and millennials increasing influence – are seen as important influencers here. At the same time, Forum attendees emphasized a need to resolve internal conflicts: companies need to be honest with themselves about their values, and “walk the talk” rather than just reacting to stakeholders.

On the evolutionary-revolutionary continuum, responsible business may begin on the evolutionary side with compliance, which remains a relevant motivator, as attendees saw this as fundamental to doing no harm. Influence from financial markets, the law, and the regulatory environment is seen as particularly useful in this regard. Increasing transparency via reporting is one result, and welcomed, with the proviso that it should be performance, not marketing, that is driving business reporting. This raises the question of whether a business is being reactive or proactive in its approach to responsibility – we heard that the reality is most often reactive.

This also raised the question that if ‘reactive’ is where responsibility starts, how does a business progress to proactive? Attendees also asked if the drive for progress toward responsible business has to be top down, and does it have to be a local focus? Organizations such as CCSR and GCNC are seen as catalysts that support these questions and the business journeys they represent. Well grounded in both Horizon 1 and 3, they are seen as important to retain as guides.

In particular, Forum attendees focused on CCSR’s establishment of eight values that describe what it means to do business like a Canadian: collaborative, eco-conscious, ethical, gender-balanced, globally minded, inclusive, innovative, and purpose-driven. As a business-focused think tank and professional association for forward-thinking business leaders, and supporter of the Soul Forum, CCSR has established a cross-Canada campaign #dobusinesslikeaCDN, that launches in March 2019 to leverage these values. This effectively establishes CCSR as a catalyst and guide for responsible business, with Forum attendees seeing the values as an inspirational business practice that should be supported. Forum feedback included the idea that basic ethics as a business norm distinguishes Canadian businesses. Although some concerns were raised about Canadian businesses not always demonstrating these values internationally, many others believed that these values were accurate reflections of how businesses in this country operate. From a Horizon 2 perspective, attendees wanted more – they called for building out the values as concepts, in part to define inclusion to ensure Indigenous perspectives, so that the values become a guide that enables businesses to think of society as a whole: coming back to the concept of “doing business like a human being.”

Where are we seeing inspirational business practices that embody the future?

There is no doubt that social enterprise in all of its forms – from purpose-built social enterprise businesses to traditional not-for-profit organizations creating social enterprises from within – fits many Forum attendees’ visions for the future of responsible business. Social enterprises of all scales have been well represented at Soul Forums through the years, and attendees reflected that the entrepreneurial skills and thinking necessary to make these enterprises successful are as necessary as they are in traditional business. The need to support this was described as a way to “connect passion with strength and goals.” Business schools are one source for this support. In addition, Forum attendees mentioned the concept of intrapreneurship,³³ which lends itself to progressing along an

evolutionary path within existing businesses, encouraging responsible business champions within the organization to bring about change. Much discussion in the world of responsible business centres on whether we have moved past corporate philanthropy and corporate social responsibility – and even the concept of creating shared value from Michael Porter and Mark Kramer³⁴ – to a situation where only purpose-driven business³⁵ are truly responsible. Some Forum attendees moderated this view, seeing it as a continuum of the integration of responsibility into business, which can be seen as parallel to that of the journey from evolution to revolution. None are necessarily wrong; they are simply degrees of responsibility to society as a whole.

The support from educational institutions – from business schools as they incorporate environmental, social and governance issues into curricular, and even to grade schools as they teach lessons on the environment and diversity – can greatly assist businesses on the continuum. In an extension of the role of academia, non-governmental bodies such as the Global Reporting Initiative³⁶ and Sustainability Accounting Standards Board³⁷ are increasingly turned to in order to provide certifications or evaluations. This is part of the trust issue referenced in Horizon 1, in which greenwashing, or even the perception of it, is increasingly an issue. Clearer standards are therefore creating conditions in which comparability and accountability can support responsible business reporting. This also supports the measurement of practical outcomes of responsible business, such as job creation.³⁸

The growing focus on diversity and inclusion (including and also beyond gender), and the growing voice of Indigenous individuals, businesses and communities, resonates in Horizon 1's stakeholder focus, but goes far beyond it. This was a theme that Forum attendees emphasized frequently. Recognizing and including all voices, especially those traditionally on the receiving or impact side of the aid relationship, shapes programs and success, no more so than when traditionally un-heard voices have the opportunity to create their own successes.

Buyer or supplier pressure is another area that is seen as embodying the future, including EcoVadis,³⁹ which makes supplier information more visible for companies, as an example. This factors into the increasing profile of the environment in business decisions and strategy, certainly beginning with climate risk, as outlined through recommendations from the Task Force on Climate-related Financial Disclosure,⁴⁰ but also expanding out beyond it, to waste management and product life cycles, in more support for a circular economy approach. Embodying the future also includes a focus on bringing social considerations to integrate with environmental considerations, as in Kate Raworth's Doughnut Economics, integrating social and environmental planetary boundaries to create a safe, just space for humanity.⁴¹

Where is innovation holding promise – or needed – if we are to achieve Horizon 3?

Forum attendee feedback on significant challenges to achieving Horizon 3 focused on the need for better learning from each other in order to make sustainability reproducible. Attendees highlighted that in order to reproduce and leverage good ideas, these ideas need to be shared. This, in turn, requires capacity development and training throughout companies, and also across sectors, in areas such as technical expertise, business mentorship, and coaching. In business, Forum attendees called for expectations around responsibility to be better integrated into performance management to create standards and support innovation, motivating within, as well as hiring for, employees with this focus. In addition, they identified opportunities to create more provincial and territorial partnerships in our efforts to learn from, and share with, one another. An opportunity also exists to better support non-profit collaborations, which attendees told us can be limited by challenges such as identity, resource, financial, policy and regulatory issues. Storytelling was mentioned as a method of communication that could bring life and inspiration to sharing ideas.

Collaboration, a recurring theme in the Roundtable discussions at this and previous Forums, comes into play here as well, along with aligning the focus on education and awareness to counter the often-polarized conversations and exchanges that currently take place. Forum attendees shared a recurring call for building greater awareness of eco-conscious and social values and the related concept of advocacy, on different levels – for employees, for foreign credentials, for inclusion, and for oil and gas sector responsibility. As one attendee stated, “the responsibility of caring and sharing needs to come from the people and be taken to government.”

As businesses progress along the continuum from evolution to revolution, and from compliance to purpose, an opportunity was highlighted for not-for-profit organizations to support businesses in learning the language of responsibility, and finding shared values that will align with their stakeholders, from customers to employees to investors. In this way, companies can be supported in closing the “say-do gap,” moving to purpose from traditional missions and visions. At the same time, attendees called for industry associations to expand their role in creating new norms within sectors, and noted the potential for oil and gas companies that are already shifting their energies (focusing on more eco-conscious operations, and improving relationships with Indigenous peoples) to help shift other companies locally. Part of this desire for change is reflected in Denise Hearn’s plenary at the Forum, noting the growing power of monopolies and near-monopolies, and the need for a “new revolution to cast off monopolies and restore free trade.”⁴²

Conclusion

Each Soul of the Next Economy Forum brings together attendees from business, academia, government and civil society. While the Executive Roundtable discussions often reflect the differing perspectives of these sectors, they also highlight the willingness of those within the sectors to collaborate to achieve the future they envision for responsible business. The Three Horizons framework captures this effectively. As Forum attendees considered where responsible business is currently situated, where they wish to see it in the future, and what can support that journey, there is a strong sense that each of the Horizons is embodied in the present moment, and that we can choose – as individuals and organizations – to focus on and support the inspiration and innovations that will lead to the future as we wish it to be.

Forum attendees emphasized that moving this vision forward requires further innovation and called for a holistic approach: beginning with the end goal and working backwards, with standardized measurement to align tactics and strategy, and with clear targets that are based on sustainability’s convergence of care for both environmental and social factors. While the responses made clear that attendees are on different places of the continuum that expresses evolutionary compared to revolutionary change, and from compliance-based reporting to purpose-driven strategy, there was a recurring thread that highlighted a willingness to take the journey together, collaborating and learning from one other.

About the Authors

Angie Redecopp is an Associate Professor of Business at Ambrose University. Angie is a former corporate lawyer and chaired the 2018 Soul of the Next Economy Forum. Angie holds an undergraduate degree in Education, a Bachelor of Laws, and a Master of Business Administration. She is currently working on her PhD and researches and speaks in the area of business and human rights. Angie can be contacted by email at aredecopp@ambrose.edu or via [LinkedIn](#).

Yvonne Jeffery is the Manager of Communications, Community Investment and Sustainability at Vermilion Energy Inc., and speaks frequently on sustainability and the UN SDGs. Yvonne holds a Bachelor of Arts and a Master of Science in sustainability and responsibility. Yvonne can be contacted by email at yjeffery@vermillionenergy.com or via [LinkedIn](#).

Endnotes

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- ³⁹ See <https://www.ecovadis.com/>
- ⁴⁰ See <https://www.fsb-tcfd.org/>
- ⁴¹ Raworth, Kate. (2017). *Doughnut Economics*. White River Junction: Chelsea Green Publishing, p. 9.
- ⁴² Tepper & Hearn, 2018, Introduction.