

Social Purpose Departments Checklist

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Introduction

This checklist is designed to help companies embed their social purpose across all business units, functions, and departments. As social purpose impacts all areas of the business, including governance, culture, strategy and operations, it is important that social purpose companies consider how existing roles and responsibilities need to be adapted to bring the purpose to life.

The following ideas serve as thought starters to help business leaders consider these new responsibilities and job descriptions across 16 illustrative leadership roles and functions. Companies beginning their social purpose journey can use these sample responsibilities to plan transitions over several years. Some social purpose responsibilities may be assigned to existing team members such as sustainability leaders in the early years of integration.

The checklist needs to be adapted to the size and structure of the business as few businesses would have all of these roles and some might be combined. This tool can be used as a framework to identify which social purpose roles and responsibilities are most relevant to your organization, helping to guide strategic planning and ensure that social purpose is effectively integrated in every function.

Some organizations may restructure after adopting a social purpose, by creating a chief social purpose officer role, establishing a new division, or acquiring another company, brand, or product – these are additional ways to integrate social purpose across the organization. There are also cross-functional responsibilities which are highlighted below.

Department leaders can use this checklist to facilitate conversations, update job descriptions, enhance training programs, and explore innovation opportunities

How to Use This Checklist

Review the “role” column and identify the roles that correspond with those in your organization. Consider the respective “social purpose responsibilities” column and determine which of these responsibilities make sense to adopt as low-hanging fruit, or over time. Use this to create a workplan to embed social purpose into business units, functions and departments, along with job descriptions and training programs. From the workplan you can determine goals and targets to integrate social purpose across your organization.

Role	Social Purpose Responsibilities
Cross-cutting roles for all leaders	<ul style="list-style-type: none"> - Integrate social purpose into the department's mandate, vision, strategy, annual plan, OKRs/KPIs, and reporting - Train and engage departmental staff on social purpose - Embed social purpose in teams and projects - Encourage a culture of innovation in advancing social purpose - Serve as a <u>social purpose ambassador and role model</u> both internally and externally - Engage with peers in other organizations and <u>professional or industry associations</u> to foster connections and share insights on social purpose - Join and participate in the Canadian social purpose community such as signing the <u>Call to Purpose</u>, subscribing to the <u>Canadian Purpose Economy Project</u>, and following <u>social purpose influencers</u> - Act as a <u>social purpose professional</u> and encourage colleagues to do so - <u>Understand and communicate the history and potential of social purpose</u> to advance a purpose economy

VP/Director of Finance	<ul style="list-style-type: none"> - Allocate and track financial, human and technological resources to support the company's social purpose and make investment decisions that align with and advance the purpose - Incorporate and document how social purpose is integrated into acquisition, divestiture and major reorganization decisions - Integrate into annual reports and financial reporting - Follow Purpose Disclosure Guidance and establish and maintain controls for social purpose reporting - Embed and track how social purpose considerations into operational and capital budget processes, investment decisions and business case development - Track and report on financial returns from social purpose investments - Identify self-funding mechanisms to reinvest savings or revenues into social purpose initiatives - Integrate purpose considerations in investment due diligence for corporate pension plans, treasury and investments
VP/Director of Strategic Planning	<ul style="list-style-type: none"> - Embed social purpose into the company's vision, corporate strategy and business plan - Ensure all aspects of the company's strategy and objectives align with the social purpose - Build social purpose into the strategy management system such as the corporate dashboard or scorecard - Set and report on long-term and interim social purpose goals, objectives and targets, including integration and impact goals - Engage internal and external stakeholders in developing social purpose goals, objectives and targets - Periodically review social purpose for relevance
VP/Director of Risk	<ul style="list-style-type: none"> - Identify, assess, prioritize, mitigate, monitor and report on risks and opportunities to or from the social purpose - Identify and manage significant negative externalities arising from the organization's activities, including in its value chain, that could impede progress on its purpose - Ensure internal and external audits verify social purpose integration and accuracy of related claims - Conduct scenario planning and stress testing to prepare for potential disruption to the social purpose - Facilitate cross-department collaboration and stakeholder engagement to monitor and address risks related to the social purpose. - Develop a crisis management plan tailored to potential disruptions affecting the social purpose
VP/Director of Human Resources	<ul style="list-style-type: none"> - Foster a company culture that embraces and advances the organization's social purpose - Train employees on the social purpose and align it with other training/education and awareness activities, ensure employees understand the social purpose and how their role supports it - Ensure social purpose is included in recruitment, leadership development, succession planning and competency models - Include social purpose in all job descriptions and the employee value proposition - Embed social purpose in the employee experience and throughout the employee lifecycle - Integrate social purpose into incentives and performance management systems - Embed social purpose in the corporate values - Include social purpose questions in employee engagement surveys - Establish regular internal communications focused on social purpose - Include social purpose in employee volunteer and recognition programs where relevant - Showcase company's social purpose achievements through award submissions

VP/Director of Marketing/Sales	<ul style="list-style-type: none"> - Integrate the company's social purpose into all marketing and branding efforts - Feature your social purpose prominently on your website home page and in the "About Us" section, along with visible accessibility to your purpose disclosures - Embed social purpose across all <u>customer touchpoints</u> - <u>Raise customer and stakeholder awareness</u> of your social purpose - Develop programs to engage and mobilize customers around the social purpose - Include social purpose questions in <u>customer surveys</u>
VP/Director of Operations	<ul style="list-style-type: none"> - Align operational decisions, policies and processes with the social purpose - Ensure physical plants and premises reflect the purpose through design and layout, branding and messaging, and other practices relevant to the purpose - Optimize resource use and efficiency to support the social purpose
VP/Director Legal Affairs and Compliance	<ul style="list-style-type: none"> - Embed social purpose in legal strategies - Manage legal risks related to social purpose - Advise on contracts to ensure they support the social purpose - Ensure the social purpose is fully integrated into all corporate policies - Proactively align the company with laws, regulations and standards that advance its social purpose - Advocate for public policies and regulations that align with and support the social purpose - Ensure the company's intellectual property strategy supports and protects its social purpose initiatives
VP/Director of Information Technology	<ul style="list-style-type: none"> - Integrate social purpose considerations into digital enablement, technology strategies, automation, AI and data strategies and decisions - Ensure IT infrastructure strategies and roadmap support and enhance the company's social purpose initiatives - Ensure the needed cross-functional collaborations align IT programs/projects with the company's social purpose - Evaluate and adopt emerging technologies that can advance the company's social purpose
VP/Director of Product Development	<ul style="list-style-type: none"> - Lead the development of products and services that advance the social purpose, including using the purpose as a lens for innovation - Conduct research to understand customer needs and preferences that align with the social purpose - Embed social purpose into the design of products, services, and customer experiences - Ensure <u>products are aligned with, and do not detract from, your social purpose</u> - Build social purpose into innovation and research and development processes - Collaborate with cross-functional teams to ensure purpose-driven product development - Evaluate and mitigate potential negative impacts of products on the social purpose - Incorporate feedback loops to continuously improve products in alignment with the social purpose
VP/Director of Corporate Affairs	<ul style="list-style-type: none"> - Raise awareness of the company's social purpose with external stakeholders - Embed social purpose in stakeholder relations and engagement strategies - Engage <u>external stakeholders in collaborations</u> to advance the social purpose - Include social purpose in government relations and advocacy efforts - Align external communications and messaging with the company's social purpose

VP/Director of Supply Chain	<ul style="list-style-type: none"> - Raise awareness of the company's social purpose among suppliers - Educate suppliers on social purpose and encourage them to adopt one - Ask suppliers if they have a social purpose; include social purpose in supplier due diligence - Collaborate with suppliers to help advance the social purpose - Include social purpose criteria in the weighted evaluation of suppliers as the marketplace evolves - Include social purpose in supplier agreements and contracts - Include social purpose in vendor satisfaction surveys and feedback mechanisms - Promote best practices and share insights on social purpose initiatives with supply chain partners
VP/Director of Investor Relations	<ul style="list-style-type: none"> - Define and communicate the social purpose narrative to investors - Engage investors on the social purpose - Attract investor capital to finance social purpose execution - Monitor and track developments in social purpose criteria set by rating agencies and indices across jurisdictions - Provide regular updates to investors on the company's progress toward social purpose goals
VP/Director of Governance	<ul style="list-style-type: none"> - Include social purpose governance in board and committee roles and responsibilities - Include social purpose in the board's education calendar and self-assessment processes - Ensure social purpose expertise is considered in board recruitment and included in the board skills matrix - Equip the board with a social purpose decision lens to evaluate proposals - Facilitate ongoing training for the board on social purpose trends and best practices - Provide the board with recommended readings, articles, and resources to deepen their understanding of social purpose and its relevance to the organization
VP/Director of ESG and Community Investment	<ul style="list-style-type: none"> - Align and focus ESG programs on social purpose achievement - Develop and maintain partnerships that support and advance the company's social purpose - Update corporate donation and sponsorship programs to align with and contribute to the company's social purpose - Develop community relations / community impact programs that advance the company's social purpose and create collaboration opportunities with community stakeholders
VP/Director of Social Purpose	<ul style="list-style-type: none"> - Establish a social purpose roadmap and associated metrics and targets to guide social purpose execution and progress - Create and chair the company's cross-functional social purpose steering committee to develop, implement, and monitor purpose plans - Ensure social purpose is embedded throughout the company and across all business functions, assisted by the collection and sharing of stories across the organization - Assist business units in prioritizing social purpose amidst other complementary or competing priorities - Conduct reviews, including third-party assessments, to drive continuous improvement in social purpose integration - Promote cross-departmental alignment, ensuring all departments support and contribute to the company's social purpose - Contribute social purpose thought leadership to help advance social purpose

Acknowledgement

Prepared by Coro Strandberg, Chair, Canadian Purpose Economy Project & President, Strandberg Consulting.

Departmental Roles in this tool build upon the following resources:

- [United Way BC Social Purpose Assessment Tool](#)
- [Social Purpose Business Curricula Framework](#)
- [Purpose Disclosure Guidance](#)

About the Canadian Purpose Economy Project

The Canadian Purpose Economy Project exists to accelerate the transition to the purpose economy. It engages national ecosystem actors to create an enabling environment for social purpose businesses to start, transition, thrive and grow. We are grateful to Coast Capital, our Founding Purpose Champion, for their support. Subscribe to our updates at www.purposeeconomy.ca and sign our [Call to Purpose](#) to help us advance social purpose in business.