

Social Purpose Toolkit

A Comprehensive Guide to Social Purpose Business

CANADIAN
PURPOSE
ECONOMY
PROJECT

About the Canadian Purpose Economy Project Social Purpose Toolkit

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Vancity, a co-operative financial
institution with a vision of a
transformed economy that protects
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Honouring Place and Relationships

This resource is intended for use across many Indigenous territories, homelands and communities. Rather than offering a single land acknowledgement, we encourage organizations to take the time to learn whose lands they are on and to understand the history, rights and ongoing presence of the Indigenous Peoples connected to those places.

Meaningful acknowledgement extends beyond words. It includes building respectful relationships, listening to community priorities and taking action that supports Indigenous self-determination, economic prosperity and reconciliation.

As you use this toolkit, we invite you to reflect on your own responsibilities to the lands, waters and Indigenous Peoples where you live and work, and to consider how social purpose can contribute to more equitable and reciprocal relationships.



Canadian Purpose Economy Project Social Purpose Toolkit

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About the Toolkit

The Social Purpose Toolkit is a practical guide to helping businesses define, embed and realize a social purpose. Whether your organization is just beginning its purpose journey or looking to strengthen an existing purpose, the toolkit provides step-by-step guidance, practical tools, worksheets, examples and resources to support implementation.

The role of business in society is evolving. Across companies of all sizes – from small and medium-sized enterprises to large corporations – success increasingly means delivering value for people and the planet, not only maximizing profit. While traditional business models focus on profit maximization, a new type of business – the social purpose business – exists to create a better world by generating positive outcomes for people and the planet in ways that underpin long-term well-being and commercial success.

For some, this shift is driven by the changing expectations of investors, employees, customers and communities. For others, it reflects values-based leadership and the conviction that business can and should be a positive force in society.

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Until now, businesses have had limited comprehensive guidance on how to define, articulate and bring their purpose to life in a credible and impactful way.

This toolkit helps you do that.

It offers step-by-step guidance, tested practices and real-world examples to help businesses uncover and realize their purpose – strengthening performance, building credibility and accelerating their contribution to a flourishing future.

It serves as a how-to guide and roadmap for leadership in the Purpose Economy – a resource to help businesses act with clarity, create lasting value and thrive by serving the greater good.

What Is a Social Purpose Business?

A social purpose business is a business whose reason for being is to create a better world. Its purpose is to profitably solve the problems of people and the planet without profiting from causing problems, and it reflects the organization's optimal strategic contribution to the long-term well-being of all people and the planet.

Social purpose businesses unlock all their enterprise capabilities, talents, resources, partnerships and influence in pursuit of their purpose.

The social purpose acts as the company's North Star, helping it navigate through ever-changing times and mobilizing employees and interest groups around it.

Key sources:
Former United Way BC Social Purpose Institute; British Academy; draft ISO 37011 Guidance for Purpose-Driven Organizations.

What Is a Social Purpose?

A social purpose defines the positive impact your company aims to create in the world – beyond profit.

- It sits at the intersection of what the world needs and what your company is uniquely good at.
- It answers: “We exist to _____ so that _____ happens in the world.”

In plain terms:

A social purpose business exists to create value for society, beyond profit.

Social purpose is foundational to the business itself. It is not a stand-alone initiative for corporate social responsibility (CSR); sustainability; environment, social and governance (ESG); or philanthropy.



Leading Through Purpose and Values: Vancity's Approach to Impact

Vancity is a values-based financial co-operative serving the needs of its 588,000 member-owners and their communities in southwestern British Columbia, within the territories of the Coast Salish and Kwakwaka'wakw Peoples.

Founded in 1946 to provide banking services to Vancouver neighbourhoods that traditional banks would not serve, Vancity has continued to evolve while staying true to its commitment to meeting member and community needs. Today, with \$41 billion in assets under administration, that commitment is reflected in its purpose of working with members and communities to help them thrive and prosper, and in its vision of a transformed economy that protects the earth and guarantees equity for all.

At Vancity, bringing its purpose and vision to life means bringing its values into the everyday choices it makes – including how it lends, who it partners with, what products it offers and how it operates. It means making sure its financial resources, partnerships and day-to-day operations support positive outcomes for people, communities and the environment. Examples include returning 30% of net profits to members and communities through its Shared Success program; offering products that lower barriers to financial services; and providing Planet-Wise™ loans with preferred rates for projects that make homes, businesses and vehicles more climate-ready.

Vancity's commitment to its purpose and meeting member and community needs is reinforced by its member-led co-operative governance, accountability reporting and impact measurement. These practices help Vancity track progress and continually adapt to the evolving needs of its members and communities.

The Vancity logo, featuring the word "Vancity" in a bold, red, sans-serif font.

Why Use This Toolkit?

This toolkit fills a common gap that many organizations face: knowing *what* social purpose is, but not *how* to bring it to life in a credible, authentic, practical and impactful way.

- **Unique step-by-step guidance, consolidated in one place**, avoiding fragmented or piecemeal approaches.
- **Based on proven, tested practices and leading (and emerging) practice**, grounded in more than a decade of applied experience and the latest research.
- **Builds on foundational work and aligns with complementary frameworks**, including the former United Way BC Social Purpose Institute and the B Corp Certification Standards, while strengthening and extending ESG, CSR and community investment approaches.
- **Designed for flexible use**, enabling organizations to work through it end-to-end or use sections as needed, at their own pace.
- **Provides a clear route for bringing social purpose to life**, showing what credible, authentic, accountable social purpose looks like in practice.
- **Provides a roadmap to become future-fit**, attract partners and drive growth.
- **Supports leadership in the Purpose Economy**, helping mainstream social purpose in business across Canada and beyond.
- **Shows how to evolve business models** and mobilize enterprise assets and interest groups to realize and accelerate purpose-led impact.

When to Develop or Refresh Your Purpose

Common triggers for developing or refreshing your social purpose include:

- Appointing a new CEO
- Reinvigorating and accelerating growth and innovation
- Establishing a new brand
- Integrating merged or acquired businesses
- Wanting to set a new course upon achieving a milestone year (e.g., 25, 50 or 100)
- Determining “what’s next” after a crisis or downturn
- Desiring greater social impact
- Needing to build a stronger corporate culture and align the organization

The Business Case for Social Purpose

Research and real-world experience show that organizations with a clearly articulated and embedded social purpose consistently achieve stronger performance across key business dimensions.

Purpose-led companies attract and retain engaged employees who find meaning in their work. They innovate more boldly, grow more sustainably, and earn deeper trust from customers and communities alike. In short, they outperform.

Well-run purpose-led businesses experience:

- 2x higher employee engagement, supporting talent attraction, retention, and motivation.**
- 3x stronger growth, driven by innovation and long-term performance.**
- 4x greater customer attraction, loyalty and advocacy, reinforcing brand value and reputation.**

For underlying studies and sources, see the [Business Case for Social Purpose](#) report.

These outcomes show a simple truth: **social purpose and business success reinforce each other**. When you treat purpose as a strategic asset – woven into decisions, governance, culture and relationships – it builds resilience, increases competitiveness and generates new value for all interest groups. It also strengthens organizational agility by providing a clear lens for rapid decision-making in uncertain and fast-changing times.

THE REINFORCING POWER OF SOCIAL PURPOSE

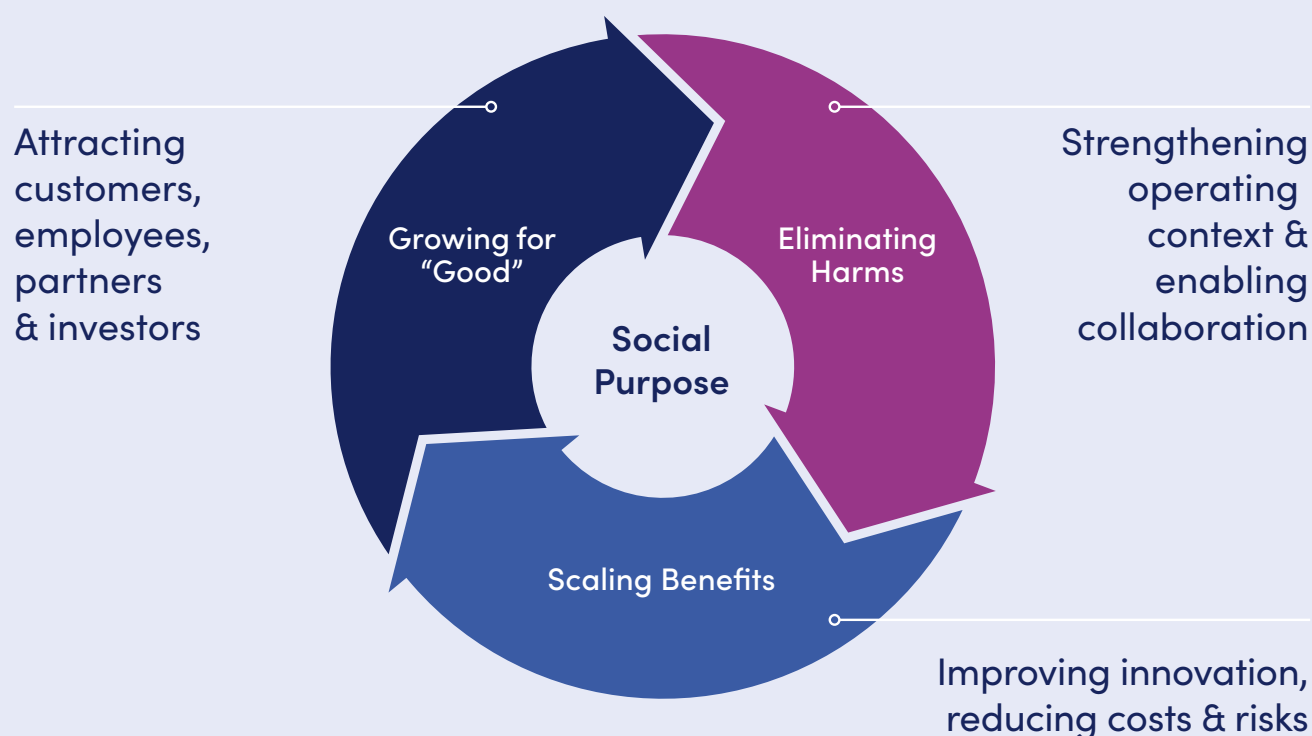


FIGURE 1: VIRTUOUS CYCLE OF VALUE CREATION

As illustrated in the **Reinforcing Power of Social Purpose** graphic above, social purpose operates as a reinforcing cycle of value. With social purpose as the engine fuelling the cycle's iteration, the company grows for good.

As the business increases its positive impact, it strengthens performance – and as performance improves, the company gains greater capacity to drive impact. By reducing or eliminating social and environmental harms, the business lowers costs and mitigates risks. By orienting strategy, innovation and decision-making around its social purpose, the company drives social innovation and advances to the next level of impact for both business and society.

In this way, social purpose and business success reinforce one another: doing good strengthens business results, and stronger business results enable the company to do even more good.

For the full evidence base and sources, see the [Business Case for Social Purpose](#) report.

THE BUSINESS BENEFITS OF SOCIAL PURPOSE



FIGURE 2: BUSINESS CASE FOR SOCIAL PURPOSE

Building the Purpose Economy

This toolkit contributes to building a Purpose Economy – a system where business success and societal well-being advance together. It guides organizations from defining a social purpose to embedding it in everyday practice and normalizes social purpose as a core feature of how business is done.

The toolkit was developed by the **Canadian Purpose Economy Project (CPEP)**, which works with ecosystem actors across Canada and beyond to create the conditions for social purpose businesses to start, transition, thrive and grow. By 2030, CPEP aims for 25% of Canadian businesses to adopt, disclose and authentically embed a social purpose across their operations and relationships, and collaborate with others to achieve it.

Reaching this threshold creates a tipping point at which social purpose in business becomes mainstream, unlocking enterprise assets that help put society on a sustainable path. Businesses that use this toolkit contribute to building that reality.



What Is the Purpose Economy?

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

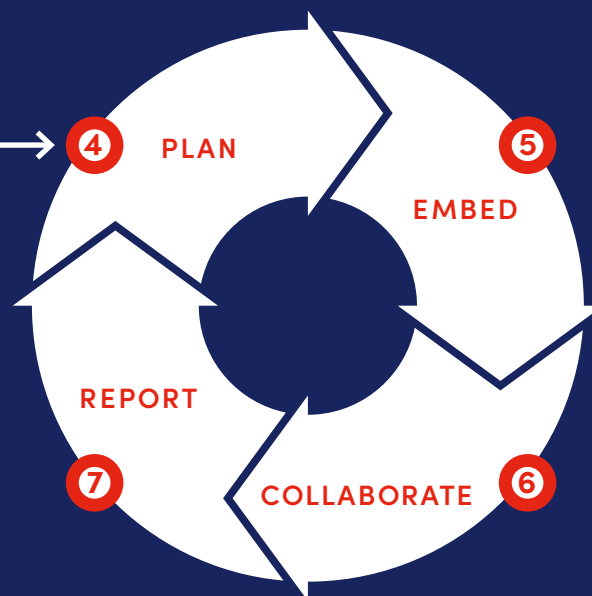
The Social Purpose Toolkit is organized around 2 core phases and 7 steps of work as set out in the Social Purpose Roadmap.

Social Purpose Roadmap

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Phase 1 Develop Your Social Purpose

Phase 2 Implement Your Social Purpose



Each company must choose a path that best suits its requirements and culture. There is no single starting point or ideal route to follow.

Phase 1 Develop Your Social Purpose			Phase 2 Implement Your Social Purpose			
1 EDUCATE	2 RESEARCH	3 DEFINE	4 PLAN	5 EMBED	6 COLLAB.	7 REPORT
- Educate management and board on social purpose - Gain agreement to proceed - Agree on company's business case and rationale - Update staff - Recruit social purpose steering committee	- Research company background - Identify unique strengths to leverage - Shortlist community or societal issues - Consult interest groups on focus and greater good potential	- Hold social purpose workshop - Draft social purpose options - Draft social purpose narrative - Engage interest groups to validate your social purpose - Approve social purpose statement - Update staff	- Renew steering committee - Create a Social Purpose Implementation Plan - Include social purpose oversight in Board governance documents (if relevant)	- Educate and engage employees - Embed social purpose in culture and operations - Update vision and corporate strategy with social purpose goals - Embed social purpose in products and services	- Embed social purpose in customer experience - Prioritize and engage interest groups - Build external social purpose collaborations - Advance the Purpose Economy	- Regularly review performance - Implement regular purpose storytelling and communications - Update website and marketing strategy - Establish data collection and management - Disclose purpose progress through annual report

[Download a printable version](#)

How the Toolkit Is Structured

The Social Purpose Roadmap works for organizations of any size. If you are a small or medium-sized business, you may complete some steps more quickly, informally or with fewer people involved, focusing on clarity, not complexity. Focus on working through the questions and decisions in a way that fits your business.

Each phase is supported by sections that guide businesses through education, definition, integration and collaboration.

Phase 1 Develop Your Social Purpose

EDUCATE AND RESEARCH

Section 1. Understanding Your Impact Opportunity focuses on education and research

DEFINE

Section 2. Defining Your Social Purpose supports articulation and testing

Phase 2 Implement Your Social Purpose

PLAN AND EMBED

Section 3. Planning and Embedding Your Social Purpose focuses on implementation and integration

COLLABORATE

Section 4. Collaborating Beyond Your Organization explores partnerships and social change

REPORT

Section 5. Reporting, Learning and Improving supports accountability and learning

Each section gives you practical tools to move the work forward:

- Worksheets and exercises
- Real-world examples showing how other businesses have put social purpose into practice
- Resource links for deeper exploration
- Practical tips drawn from implementation experience to help you avoid common pitfalls and focus your effort
- Progress indicators linked to the **Social Purpose Assessment Tool** – enabling you to track your advancement across seven business functions as you complete each step

Social Purpose Assessment Tool by Phase:

Phase 1 completes scorecard practices in Business Model and Governance and Leadership.

Phase 2 advances People and Culture, Operations, Customer Experience and Marketing, Business Ecosystem, and Monitoring and Reporting.

Download the [Social Purpose Assessment Tool](#) here to baseline your progress and set your five-year ambitions.

How to Use the Toolkit

This toolkit is designed to be practical and flexible for organizations at different stages of their social purpose journey and across organizational types, from Crown corporations and co-operatives to public, private and family-owned businesses. Do not feel you need to use every section at once.

If you have not yet developed your social purpose, start with **Phase 1: Develop Your Social Purpose**. This phase builds your understanding of your impact opportunity and defines a credible social purpose that is grounded in your business model, strengths and context.

If you have already developed your social purpose, you can move directly to **Phase 2: Implement Your Social Purpose**. The implementation sections are designed to be followed step by step, with an embedded sequencing and a timeline that supports deliberate, phased integration over time.

Use the toolkit in a modular way. Focus on the section that matters most to you – such as governance, culture, business models, collaboration or disclosure – and work through that section on its own.

If the toolkit feels too heavy, there is a lighter entry point. You can use the [Social Purpose Assessment Tool](#) to identify your key gaps and opportunities, then turn to the relevant toolkit sections to address those areas. You may choose to focus on one or two priority practices from the assessment tool, or to use your own internal measures of progress rather than following every implementation section in detail.

The toolkit is designed to support different levels of ambition, capacity and pace – helping you bring your social purpose to life in ways that are realistic, credible, authentic and impactful for you.

In short: take what's useful, use what works and don't try to do everything at once.

Typical Time Investment

Time will vary based on size, capacity and depth of engagement.

Phase 1: Develop Your Social Purpose Usually two to six months

- Understanding your impact opportunity: a few discussions to several workshops
- Drafting your purpose: one to three iterations
- Validation and refinement: leadership review and selective interest-group input

Phase 2: Implement Your Social Purpose Usually six to 36 months (phased over time)

- Early integration actions: first three to six months
- Embedding into governance, operations and decision-making: ongoing over one to two years
- Collaboration initiatives: developed progressively over time, starting in Year 3
- Continuous improvement and disclosure: ongoing practice

Many smaller businesses complete the core work more quickly by involving fewer people and integrating discussions into existing meetings.

Clarifying Key Concepts

Because social purpose is often confused with related concepts, it is important to distinguish it clearly before beginning.

Social Purpose vs. Vision or Mission

A **social purpose** explains *why* your organization exists – your enduring reason for being, expressed through the positive contribution you make to society.

A **vision** describes *where* your organization is headed in fulfilling your purpose – the future state and impact you aim to create. It sets out what success looks like and is aspirational, forward-looking, large scale and long term.

A **mission** describes *what* your organization does to deliver on your purpose on a daily basis. It is descriptive and sets out specifically and practically what your organization aims to do in pursuit of your purpose.

CLARIFYING MISSION, VISION AND SOCIAL PURPOSE

Concept	What It Focuses On	Time Frame
Mission	What we do and how we operate	Now
Vision	Where we want to go/desired future state	Future
Social Purpose	Why we exist for society beyond profit	Always

FIGURE 3: MISSION, VISION AND PURPOSE

When these elements work together, they create your social purpose management system, as shown in the following graphic. Business leaders note that purpose brings focus to the strategy and culture, and together they drive the organization forward.

This graphic shows how purpose is integrated across core systems, including strategy, operations, governance and performance management.

SOCIAL PURPOSE MANAGEMENT SYSTEM

Purpose aligns the strategic framework and is embedded in foundational elements.



FIGURE 4: THE ORGANIZATIONAL SYSTEMS SUPPORTING SOCIAL PURPOSE INTEGRATION (ADAPTED WITH INPUT FROM COAST CAPITAL)

Purpose Language

Terms such as *social purpose*, *sustainable purpose*, and *societal purpose* all reflect the same core idea: a company's reason for being, expressed in terms of the positive value it creates for society and/or the environment beyond profit. (B Corp refers to this as an organization's "Public Purpose.")

Your business may choose a social, environmental, socio-economic or socio-ecological purpose. What matters is that the purpose extends beyond benefiting customers to create a positive impact on society. The term "social purpose" is often used as shorthand to encompass all these dimensions.

Different businesses use different language, and that's appropriate. Choose the term that fits your context and culture and use it consistently. What's essential is that your purpose is clear, authentic and embedded in how your business operates.

Corporate purpose is a broader term referring to a company's reason for being. Companies define this in different ways – for example, around products, customers, financial performance or societal impact. This toolkit focuses on **social purpose**, where a company defines its reason for being in terms of the positive value it creates for society or the environment through its core business. (See the Four Types of Corporate Purpose illustration on page 16.)

This toolkit uses the terms "social purpose" and "purpose" interchangeably throughout

The Term "Social Purpose Statement"

This toolkit uses the term **social purpose statement** to mean a concise statement expressing an organization's social purpose.

Guidance for Purpose-Driven Organizations (Draft ISO 37011) uses the term **purpose statement** differently. While its definition of **organizational purpose** is consistent with the concept of **social purpose** used in this toolkit, it uses **purpose statement** to refer to a broader governance document, approved by the highest governing body, that explains and justifies an organization's purpose, how it will be pursued and the value it intends to create and protect.

The draft guidance also provides a more comprehensive governance framework for determining organizational purpose. It places greater emphasis on governing body deliberation, evidence, obligations to interest groups, risk and formal justification that the chosen purpose represents the organization's optimal strategic contribution to the long-term well-being of all people and the planet.

Organizations do not need to refer to their purpose as a "purpose statement" or "social purpose statement"; they can simply call it their "purpose."

Pathways to Purpose: Indigenous Perspectives

The [Social Purpose Assessment Tool](#) is designed for all businesses. To better reflect and support Indigenous entrepreneurs, Nation-owned businesses, development corporations, community enterprises and Indigenous organizations, the Canadian Purpose Economy Project has developed [Pathways to Purpose: Indigenous Perspectives](#), a draft resource that provides Indigenous perspectives on the Social Purpose Assessment Tool for consultation and feedback.

Written by Michelle Reid, an Ojibwe woman from Serpent River First Nation and Co-founder of the Canadian Purpose Economy Project, the resource explores how the Social Purpose Assessment Tool can be understood

and applied through Indigenous perspectives, values, governance traditions and ways of knowing.

While maintaining the core assessment framework and rating system, it introduces culturally grounded language, examples and reflective prompts that honour Indigenous worldviews, relational accountability, sovereignty and community well-being.

We invite Indigenous businesses, organizations, communities and Nations to share their feedback and help shape the ongoing development of this resource.

Access the draft Pathways to Purpose: Indigenous Perspectives and consultation information [here](#).

How Social Purpose Differs From CSR, Sustainability and ESG

Social purpose differs from traditional CSR, sustainability and ESG approaches. A social purpose defines why an organization exists, expressed through its societal contribution, whereas CSR, sustainability and ESG focus on how an organization identifies, manages and discloses its social and environmental risks, opportunities and impacts.

While there may be overlap, they are not the same. Social purpose sets direction and ambition by defining the societal value an organization seeks to create. CSR, sustainability and ESG provide the management systems and practices that support responsible operations, including the identification and management of social and environmental risks and opportunities. Social purpose focuses on the societal impact

SOCIAL PURPOSE VS. CSR/ESG



Social Purpose

A company's societal reason to exist



CSR/ESG

A company's approach to managing its social and environmental risks and improving its social or environmental performance

Purpose is the “G” of ESG

FIGURE 5: SOCIAL PURPOSE COMPARED WITH CSR AND ESG APPROACHES

most closely connected to an organization's core business and greatest area of influence.

For example, an energy retailer might support customers experiencing financial hardship as part of responsible business practice, among many ESG priorities it manages. Its purpose is more likely

to be anchored in its primary impact opportunity, such as enabling the transition to sustainable energy and a low-carbon economy.

It is important to clarify these distinctions early to avoid confusion and align your organization.

How Social Purpose Differs From Other Types of Purpose

Many companies adopt purpose statements, but for one to qualify as a social purpose, it must go beyond benefiting the business or its customers to create value for society.

Companies express their purpose in different ways. Some purpose statements focus on products, customers or profit.

A social purpose is different. It defines a company's reason for being in terms of the positive impact it aims to create for society.

The following page illustrates these four types of corporate purpose and shows how a social purpose stands apart.

FOUR TYPES OF PURPOSE

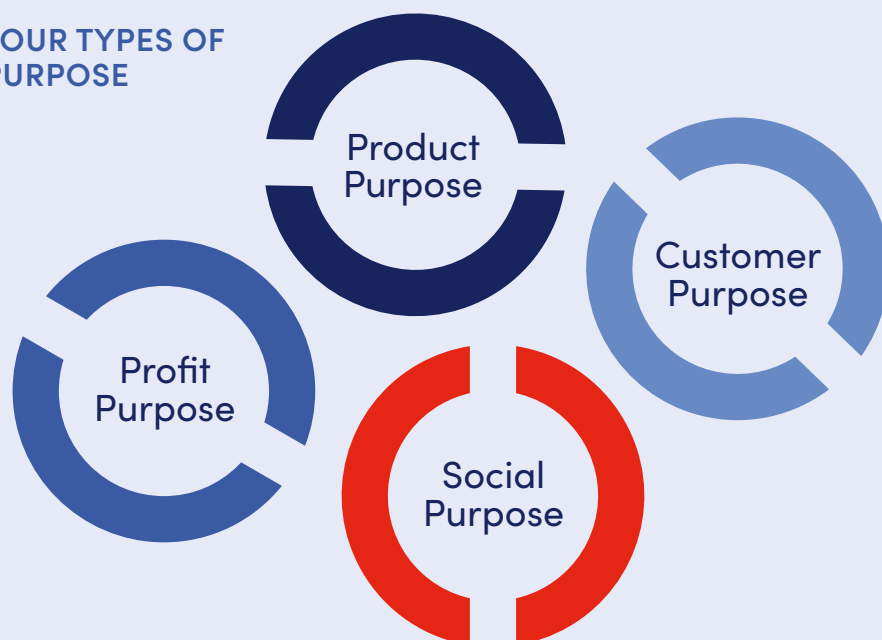


FIGURE 6: FOUR TYPES OF CORPORATE PURPOSE

Understanding the Four Types of Corporate Purpose

Companies express their purpose in different ways – around products, customers, profit or societal impact. Here's what makes a social purpose distinct.

Product-Focused Purpose

A product-focused purpose centres on what the company produces and the benefits of that product.

Example: Volvo
The safest car on the road.

The focus is on product excellence and differentiation.

Customer-Focused Purpose

A customer-focused purpose highlights the value you deliver to customers.

Example: Speedy Muffler
Fast, hassle-free service in 30 minutes.

The emphasis is on service quality and customer experience.

Profit-Focused Purpose

A profit-focused purpose emphasizes financial performance and returns for shareholders.

Example: Goldman Sachs
Delivering long-term returns for shareholders and maximizing financial performance for clients and the firm.

The emphasis is on financial outcomes and shareholder returns.

Social Purpose

A social purpose defines a company's reason for being in terms of the **positive impact it creates for society**. The social purpose is an expression of the company's overarching ambition to **profitably solve the problems of people and the planet without profiting from causing problems**.

It goes beyond a company's products or customers, focusing instead on the broader contribution it seeks to make to people, communities, or the planet.

Key Characteristics of a Social Purpose

- Addresses a societal and/or environmental challenge.
- Leverages the full business model – products, operations, supply chains, culture and partnerships.
- Is integrated into the core business, not limited to philanthropy or CSR programs.
- Is enduring, intended to guide the company across business cycles and leadership changes.

Examples of Social Purpose Statements

IKEA

To create a better everyday life for many people.

Whole Foods Market

To nourish people and the planet.

Algoma Steel

To build better lives and a greener future.



**A Simple Way to
Think About It**

Companies still need to create value for customers, deliver excellent products and services and operate profitably. But when a company adopts a **social purpose**, it goes further – using its business capabilities to **create meaningful positive impact in the world**.

WHAT SOCIAL PURPOSE IS – AND WHAT IT IS NOT

Social Purpose IS	Social Purpose IS NOT
Why you exist as an organization – your reason for being in societal terms	What your organization does or <i>how</i> it does it
Core to the business model, guiding decisions, strategy and operations	A stand-alone program, goal, strategy or initiative
A North Star, a quest continually pursued	Philanthropy, your “brand,” a cause campaign or a tagline

FIGURE 7: DISTINGUISHING SOCIAL PURPOSE

Research by the Canadian Purpose Economy Project examining the **TSX 60 – Canada’s largest publicly traded companies** – shows that roughly **40%** articulate a **social purpose**, while a small number focus on products or customers and many have no clearly articulated purpose. See the [TSX 60 Social Purpose Report Card \(2025\)](#).

Research conducted by the Financial Resilience Institute in collaboration with the Canadian Purpose Economy Project found that **29% of Canadian small and medium-sized businesses report having an explicit or implicit social purpose**, with a further 9% planning or interested in developing one. For many organizations, the next step is transitioning from an implicit purpose – one that is reflected in actions but not clearly articulated – to an explicit social purpose that guides strategy, decision-making and impact. See [Social Purpose Among Canadian SMEs](#).

Building on this foundation, the toolkit now turns to how your organization can define its social purpose and begin the journey of putting it into practice.

How B Corp and Social Purpose Fit Together

For organizations familiar with **B Corp**, it may be helpful to understand how B Corp requirements align with social purpose as defined in this toolkit.

B Corp’s B Lab Standards (2025) require certified companies to adopt a **Public Purpose** (B Corp’s term for social purpose) that:

- Articulates a positive impact on society and/or the environment.
- Is approved by the company’s highest governing body.
- Is integrated into its strategy.
- Is reviewed by that governing body at least annually.

The standards include a number of references to resources developed by the Canadian Purpose Economy Project. For more information, see this [link](#).

By following the guidance in the Social Purpose Toolkit, B Corp companies and applicants can align with key B Corp standards – particularly Purpose and Stakeholder Governance, and Government Affairs and Collective Action.

Phase 1

Develop Your Social Purpose

Define why your business exists in societal terms and the unique contribution it seeks to make.



Develop Your Social Purpose

Phase 1 focuses on defining your organization's social purpose – why your business exists in societal terms and the unique contribution it seeks to make. Through research, engagement and reflection, you'll identify where the world's needs intersect with what your organization is best positioned to offer, creating a credible, enduring foundation for long-term value.

There are two sections in this phase:

EDUCATE AND RESEARCH

Section 1. Understanding Your Impact Opportunity

DEFINE

Section 2. Defining Your Social Purpose

The work begins by understanding your impact opportunity.

Phase 1 Develop Your Social Purpose			→ Phase 2 Implement Your Social Purpose			
1 EDUCATE	2 RESEARCH	3 DEFINE	4 PLAN	5 EMBED	6 COLLAB.	7 REPORT
- Educate management and board on social purpose - Gain agreement to proceed - Agree on company's business case and rationale - Update staff - Recruit social purpose steering committee	- Research company background - Identify unique strengths to leverage - Shortlist community or societal issues - Consult interest groups on focus and greater good potential	- Hold social purpose workshop - Draft social purpose options - Draft social purpose narrative - Engage interest groups to validate your social purpose - Approve social purpose statement - Update staff	- Renew steering committee - Create a Social Purpose Implementation Plan - Include social purpose oversight in Board governance documents (if relevant)	- Educate and engage employees - Embed social purpose in culture and operations - Update vision and corporate strategy with social purpose goals - Embed social purpose in products and services	- Embed social purpose in customer experience - Prioritize and engage interest groups - Build external social purpose collaborations - Advance the Purpose Economy	- Regularly review performance - Implement regular purpose storytelling and communications - Update website and marketing strategy - Establish data collection and management - Disclose purpose progress through annual report

Understanding Your Impact Opportunity

In this section, you will build awareness and gather insights to determine where your business can have the greatest impact. Through education, research and early alignment, you'll develop shared understanding and identify the strongest opportunities for impact.

You will work through **Steps 1 and 2** of the **Social Purpose Roadmap**. You will begin with education and alignment and then move into research, where your organization explores its context, strengths and interest-group perspectives to understand where it can have impact.

Step 1: Educate

Step 1 starts with education and alignment – building a shared understanding of social purpose before moving into research and definition.

1.1 Educate Board and Management on Social Purpose

Early education ensures that leaders understand social purpose – what it is and is not – and how it differs from charitable activities, CSR or ESG.

This education may include:

- Using CPEP's Introduction to Social Purpose slide deck, available as a [PDF](#) and customizable [PowerPoint](#).
- Sharing the [Social Purpose Continuum](#) to illustrate how social purpose differs from charitable or transactional approaches, guiding your business toward scaled impact.
- Communicating the [business case for social purpose](#), using evidence relevant to the organization's context, such as revenue growth, talent attraction and retention and/or customer acquisition.
- Ensuring board and executive leaders are aligned on why the organization is exploring social purpose and what it may enable, such as greater impact, enhanced resilience, deeper interest-group trust and sustained competitive advantage.

Step 1 At a Glance

- Educate board and management.
- Gain agreement to proceed.
- Agree on business case and rationale.
- Update staff and recruit steering committee.

The [TSX 60 Social Purpose Report Card \(2025\)](#) provides helpful context, showing that approximately half of TSX 60 market capitalization is linked to companies that articulate a purpose aimed at creating a better world. This offers context on social purpose adoption across Canada's major market players.

1.2 Gain Agreement to Proceed

Secure explicit leadership commitment before beginning the deeper work. Gain alignment on:

- Why the organization is exploring a social purpose.
- What the initial process will involve.
- Support to move forward with the next steps.



At its core, a social purpose business exists to create value for society, beyond profit.



The World's Largest Institutional Investor on the Importance of Corporate Purpose

BlackRock, with more than \$14 trillion USD in assets under management, identifies corporate purpose as a core element of long-term business performance and financial resilience, as reflected in its 2026 [engagement priorities](#).

“Strategy, purpose and financial resilience as an investment issue: In our experience, a well-defined purpose supports a clear sense of direction in corporate leadership, and helps companies to compete, navigate short-term challenges and achieve long-term growth. This in turn helps companies to attract and retain a high caliber workforce, build stronger customer loyalty and maintain investor confidence. These factors are important to building financial and business resilience, attracting long-term capital and delivering durable profitability.

We engage on long-term corporate strategy, purpose and financial resilience to understand how boards and management are aligning their business decision-making with the company’s purpose and adjusting strategy and/or capital allocation plans as necessary as business dynamics change.” **BlackRock**



1.3 Agree on Business Case and Rationale

Align your leadership team on why your business is exploring a social purpose.

Agree on your social purpose business case and rationale, which may include:

- Strengthening long-term relevance and resilience.
- Guiding future growth and innovation.
- Attracting and retaining talent.
- Building trust with employees, customers, communities or partners.
- Responding to societal needs aligned with your business model and capabilities.

This establishes a shared mandate to proceed – clarifying intent, ambition and expectations before investing further time and resources.

1.4 Recruit a Social Purpose Steering Committee

Establish a cross-functional steering committee or working group to guide the process from definition through implementation. In smaller businesses, this role may be carried by a single internal champion or a small leadership group rather than a formal committee.

Build a group that represents key functions, perspectives and levels across the business and plays a key coordination role:

- Supports cross-departmental alignment.
- Helps interpret research and consultation findings.
- Provides constructive challenge and continuity as work progresses.
- Ensures consistent focus over time.

The steering committee complements – not replaces – executive and board accountability. Its role is to facilitate effective execution, not make final decisions.

Consider this [Sample Terms of Reference](#) available [here](#). Many organizations use a definition-phase committee, then refresh its membership and mandate for the implementation phase – bringing in the functions responsible for delivery while maintaining continuity.

1.5 Update Staff

Engage employees early to build understanding, readiness, buy-in and excitement. Let them know:

- Why the business is pursuing social purpose.
- What social purpose means.
- How it connects to the organization's future direction.
- What employees can expect in terms of involvement and timing.

Communicate early to build understanding, reduce speculation, signal that this is a core business priority and prepare for meaningful engagement later.

Moving to Step 2: Research

With leadership aligned, agreement secured, staff informed and a steering committee in place, you're ready to move into the next step: **Research**. This stage focuses on understanding your organization's context, strengths, interest groups and opportunities to make your greatest contribution to society.

The following resources will help build a shared understanding of social purpose and prepare your organization to begin the research process.

Resources

Reports

[Social Purpose Among Canadian SMEs](#)

[TSX 60 Social Purpose Report Card \(2025\)](#)

Tools and Guides

[Introduction to Social Purpose](#) (PDF)

[Introduction to Social Purpose](#)

(PowerPoint – use and adapt with attribution to CPEP under the Creative Commons License)

[Definition of a Social Purpose Business](#)

[Social Purpose Continuum](#)

[Business Case for Social Purpose](#)

[Social Purpose Steering Committee Guide](#)

[Purpose Points of View](#)

Videos

[Introduction to Social Purpose and the Social Purpose Business Case](#)

Tips for Success

- Engage senior leaders early to establish tone, alignment and commitment.
- Use compelling, evidence-based materials to strengthen the business case.
- Reinforce that purpose is strategic, not philanthropic.
- Secure explicit agreement on the business case before investing further.
- Communicate with staff to build readiness and excitement.

Worksheet



Use the [Build a Business Case](#) worksheet to help determine your company's social purpose business case and support conversations with leaders, colleagues and interest groups.

Ready-to-Use Slide Deck: Introduction to Social Purpose

To support internal learning and shared understanding, organizations may wish to use CPEP's ready-made Introduction to Social Purpose slide deck. It introduces the concept of social purpose in business, including definitions, examples and the business case. This resource can be used for board discussions, leadership meetings, employee education sessions and interest-group conversations.

The deck is available in both PDF and PowerPoint formats. The PowerPoint version may be adapted for your organization's own use, with attribution to the Canadian Purpose Economy Project (CPEP), under the Creative Commons License.

[Introduction to Social Purpose](#) (PDF)

[Introduction to Social Purpose](#) (PowerPoint) – use and adapt with attribution to CPEP under the Creative Commons License)



The focus now shifts to discovering your organization's impact opportunity. Through research and consultation, you'll explore your business context and strengths, societal needs and interest-group perspectives to identify where your organization is uniquely positioned to contribute.

Step 2: Research

Step 2 focuses on insight-gathering – looking inward to uncover your organization's unique strengths, values and context, and outward to understand societal needs and interest-group expectations. It builds on the shared understanding created in Step 1 and generates the evidence and perspectives you will later use to define a clear, credible social purpose.

Before defining your social purpose, understand how purpose is expressed in your markets, examine who you are and the strengths you bring, and explore the social and environmental needs you may be well positioned to address.

To define your purpose, focus on two core inputs:

1. What your community or broader society needs and the problem or opportunity your organization is uniquely positioned to address.
2. Who you are and what you bring to the world – your core strengths and competencies (your superpower).

Where these two intersect lies the inspiration for a credible and meaningful social purpose.

Step 2 At a Glance

- Map strengths to societal needs.
- Research markets, company background and community/societal issues.
- Consult interest groups for insights.
- Synthesize findings.

This relationship is illustrated in Figure 8 below, showing how purpose emerges at the intersection of organizational strengths and societal needs.

The goal at this stage is not to draft a purpose statement, but to gather the inputs that will make that future definition grounded, relevant and actionable.

DEFINING YOUR SOCIAL PURPOSE

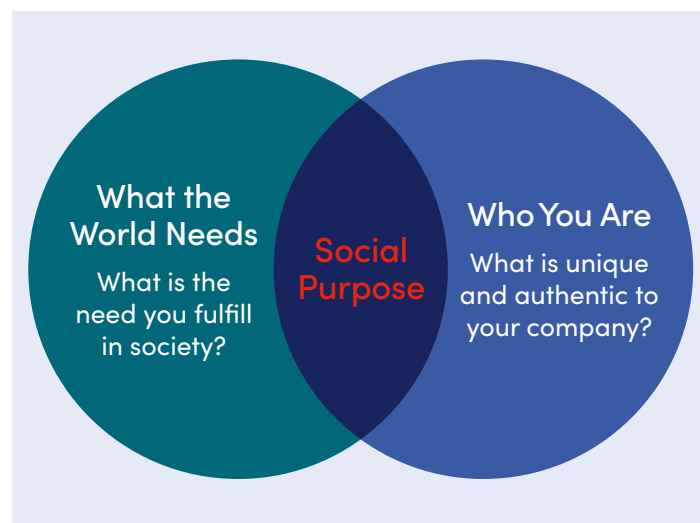


FIGURE 8: HOW AN ORGANIZATION UNCOVERS ITS SOCIAL PURPOSE

2.1 Research Purpose in Your Market

Begin by reviewing how other businesses express their purpose. Explore company websites, reports and “About Us” sections to see how purpose is expressed across industries.

This scan helps you become familiar with common patterns, language, and positioning and highlights differences across sectors and markets. It will help you uncover a unique and relevant purpose.

To support this step, see the companion page [Examples of Social Purpose Statements](#), which includes a selection of purpose statements from a range of Canadian and global brands. Use these examples to observe differences in how organizations express purpose – not as statements to copy.

Find purpose statements from:

- Businesses within your own industry.
- Adjacent or related industries (including across your value chain).
- Businesses operating in your local or regional market(s).

As you review these statements, document and note:

- What resonates with you and what does not.
- Language, verbs or outcomes you find compelling.
- Gaps or opportunities for differentiation.

This process helps clarify how you may wish to express your own social purpose – and what you may want to avoid as you begin shaping a direction that feels authentic, credible and distinctive for your business.

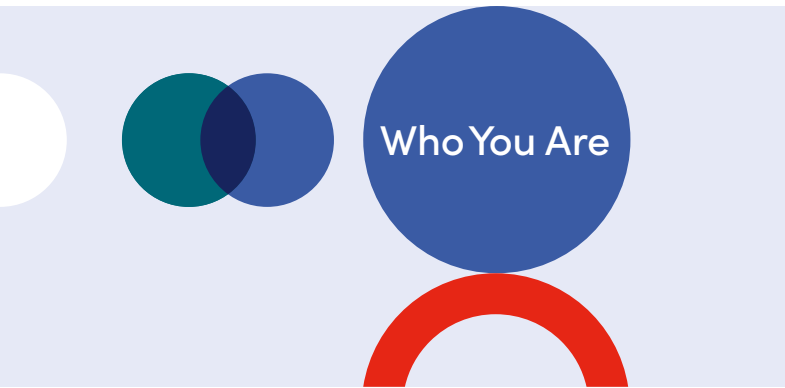
MAPLE LEAF FOODS EXAMPLE

TSX-listed Maple Leaf Foods, a global protein company, identified its social purpose by considering what the world needs alongside its business opportunities and core assets.



FIGURE 9: EXAMPLE OF MAPLE LEAF FOODS' APPROACH TO DEFINING ITS SOCIAL PURPOSE

2.2 Research Company Background



Drafting a social purpose is informed by self-awareness and understanding. Every business operates within a specific context shaped by its history, mandate, ownership structure, business model, shared narrative, unique organizational identity, strategy and operating environment.

Internal Deep Dive

Conduct an internal deep dive to understand your organization's context – its origins, evolution and future direction – and how it might shape your social purpose.

Complete this exercise to:

- Understand your organization's potential and internal motivations.
- Clarify its strategic direction and trajectory.
- Surface signals of **implicit** purpose-related intent.

To support this reflection, work through the following guiding questions as you review internal materials and observe how your organization operates.

Understanding the business model and strategy:

- What does the company do, and how does it make money?
- Who are its core customers and markets?
- What are the strategic priorities over the next three to five years?

Understanding identity and culture:

- What stories are told internally about success, pride and impact?
- What cultural cues, traditions or behaviours reflect “who we are” (our unique organizational identity) and “how things really work here”?

Review these core internal materials to understand how the organization presents itself, makes decisions and sets priorities:

- Mission, vision and values statements
- Strategic priorities and planning documents
- Sustainability and annual reports
- Policies, goals and public commitments related to environmental or social performance
- Marketing materials, brand narratives and storytelling

“Defining our social purpose at first was a daunting idea and made me wonder about the value of the exercise, especially for a small company like ours. Once engaged in the process, I found the steps taken revealed a much deeper and more fulfilling journey as we learned about and from our employees, customers and suppliers. I believe defining our social purpose (to ‘empower liberty, democracy and community through freedom of expression’) will strengthen us as a company from the inside out.”

– BYRON SHEARDOWN, CEO, WEB EXPRESS PRINTING & MAILING

Purpose and Passion

In addition to analyzing your business and external context, it is important to surface the motivations and aspirations within your organization.

For many companies, particularly early-stage, founder-led enterprises, purpose reflects the leaders' and early colleagues' passion. Connecting to discuss what inspires and drives the team can unlock insights into the company's social purpose.

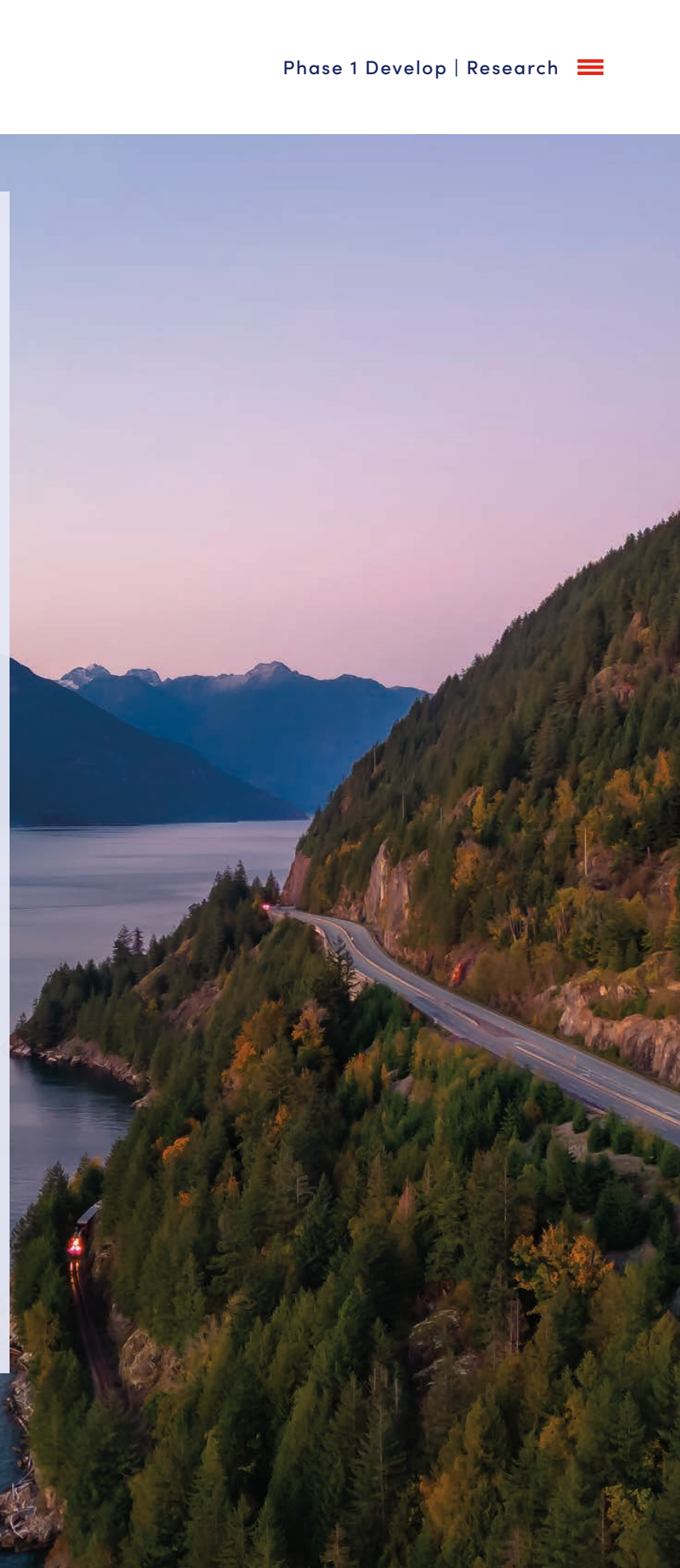
Start with the company's vision, which often expresses the founder's motivation. How do you aim to make the world better through your work? What social or environmental challenges need to be addressed for your vision to come to fruition?

Use your company's values or guiding principles as another starting point. How do you aim to “show up” not only for customers but also as a change-making enterprise? Many teams are also motivated by commitments to one or more of the [United Nations Sustainable Development Goals](#) (worldwide goals for people, the planet and prosperity). Which of those spark your team's interest and align to your business model and plans?

Gather a representative group of staff to discuss these questions and identify the common themes that emerge. Then bring those insights into your conversations about what the world needs and where your organizational strengths can contribute.

Hold this passion conversation separately from discussions about your operational capacity, assets and market presence. This builds team buy-in and excitement, while maintaining a strategic focus on the social purpose you will pursue.

For an optional approach that centres organizational passion in defining your social purpose, see page 47.



EXAMPLES OF SOCIAL PURPOSE STATEMENTS

These examples illustrate how organizations across sectors express their social purpose. They are included to support learning, comparison and inspiration – not as models to copy.

As you review these examples, note differences in tone, scope, ambition and language – and consider what feels credible and distinctive for your own business.

Next, reflect on your company's origin story to understand its underlying drivers and evolution. Many organizations were founded to address a specific need, challenge or aspiration that may still be relevant today. As organizations grow and leadership evolves, strategic priorities often expand or shift. In some cases, the founding intent becomes less visible; in others, it remains embedded and can be reinterpreted for today's context.

- What motivated the founders to start the business?
- What problem or unmet need were they responding to?
- Are there elements of this original intent that could meaningfully inform a modern social purpose?

Finally, assess where your organization is headed strategically, including:

- Growth plans.
- Recent or planned mergers, acquisitions or divestitures that signal strategic shifts.
- Product enhancements or new products or services to be launched.

Together, these insights provide a grounded understanding of who your business is, how it has evolved and what it is positioned to contribute going forward. They also help ensure that your future social purpose supports or informs your organization's trajectory, including any strategic market shifts.

Company	Social Purpose Statement
	To create a world of love, confidence and belonging.
	To build better lives and a greener future.
	To transform infrastructure for a healthy, thriving planet.
	To create chemistry for a sustainable future.
	To empower a nation of dreamers and doers to build a better tomorrow for all.
	To enrich lives through technology.
	To embolden explorers and preserve the planet they roam.
	To power an inclusive future for all.

EXAMPLES OF SOCIAL PURPOSE STATEMENTS

Company	Social Purpose Statement
	To provide financial security for Canadians and our communities.
	To build better futures together.
	To unite working people to build a just world.
	To drive the world forward.
	To provide every person access to lifelong mental health support.
	To create connections, build community and inspire actions that safeguard the health of the world's forests.
	To lead the industry to love the world.
	To create the beauty that moves the world.
	To uphold the human right to be informed, heard and understood.

Company	Social Purpose Statement
	To build a sustainable, inclusive future where shared vehicles strengthen communities.
	To restore lives, the planet and communities.
	To help clients thrive and communities prosper.
	To support the rising presence of Indigenous Peoples in Canada.
	To transform lives by awakening Canadians to the power of sleep.
	To leverage our global-leading technology and compassion to drive social change and enable remarkable human outcomes.
	To inspire and equip consumers to step outside, work hard together and move the world forward.
	To inspire the social consciousness of brands.

Unique Strengths to Leverage

Next, identify the distinctive strengths your organization can harness to advance its social purpose. These strengths show where your business can create the greatest impact while building long-term value.

Start by asking:

What competencies, resources, relationships and influence can we leverage to contribute to a better world through our core business – and which of these represent our superpowers?

Use the **Core Competencies and Assets Checklist** below to map your organization's unique strengths to leverage.

Mapping these strengths clarifies where your organization can contribute most meaningfully and authentically. These insights will serve as inputs to your purpose definition – harnessing what your business does best to address what society needs most.

IDENTIFY YOUR ORGANIZATIONAL STRENGTHS

CAPABILITIES What your people know and can do	☐ Employee time, skills and expertise, including volunteering and pro bono work ☐ Professional knowledge and lived experience ☐ Leadership and management capability ☐ Innovation, problem-solving, research and service-delivery capacity
ASSETS What your business owns, operates or controls	☐ Products and services ☐ Land, retail outlets, branches, facilities and other physical locations ☐ Community investments, donations and sponsorships ☐ Infrastructure, equipment and technology platforms ☐ Data and intellectual property ☐ Financial capital and investment capacity
RELATIONSHIPS Who your business is connected to and trusted by	☐ Employees and workforce relationships ☐ Customers and clients ☐ Industry peers, business partners, suppliers, vendors and contractors ☐ Community organizations, unions and governments ☐ Universities, technical and research institutes and think tanks
PLATFORMS AND INFLUENCE How your business might use its influence	☐ Brand reputation and visibility ☐ Purchasing and buying power ☐ Convening and partnership capacity ☐ Influence within your sector or value chain ☐ Advocacy, public voice and leadership on key issues

FIGURE 10: CORE COMPETENCIES AND ASSETS CHECKLIST

2.3 Research Societal and Community Issues



Once you complete your company and peer research and have identified your key competencies and assets, prioritize societal or community needs where your organization can contribute most meaningfully. This includes understanding both current societal challenges and emerging trends that could shape, disrupt or redefine your business and sector over time.

Apply this approach to:

- 1. Map priority issues.** Identify the pressing issues affecting broader society or, for local businesses, the communities where you operate or serve. **Ask:** What problems most impact people, nature or ecosystems connected to our business?
- 2. Scan your sector.** Research the major challenges and trends across your industry or value chain. Identify where your business has influence or can drive change. **Ask:** What societal trends could significantly affect our industry or markets over the coming decade? Which issues may pose risks, constraints or opportunities for our business model, supply chain, workforce, communities or customers? Where is innovation occurring in response to these challenges, and how might it redefine expectations, standards or competitive advantage?
- 3. Assess your connection.** Identify areas where your organization has a clear responsibility, interest or unique opportunity to act. **Ask:** Where do our business activities, relationships and capabilities intersect most clearly with these societal needs?

MAPLE LEAF FOODS SOCIETAL TRENDS

Example: Maple Leaf Foods researched societal trends such as food security, health and sustainability to inform its social purpose – demonstrating how sector-specific issues can shape purpose direction.

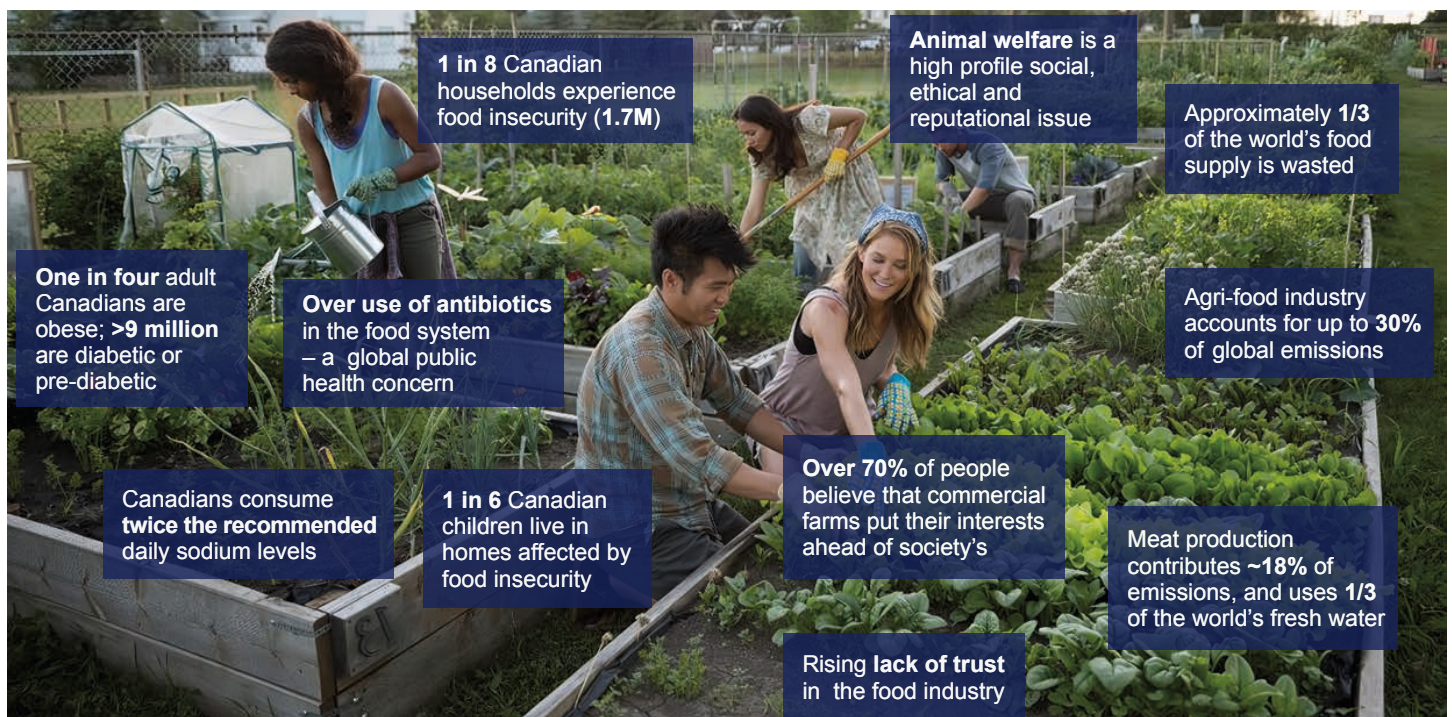


FIGURE 11: MAPLE LEAF FOODS SOCIETAL TRENDS RESEARCH

Use Global Frameworks as Inputs

One practical reference for understanding what the world needs is the United Nations Sustainable Development Goals (UN SDGs). The 17 SDGs reflect a broad global consensus on the social, environmental and economic challenges facing societies worldwide.

You can use the SDGs to screen and prioritize societal issues, helping you move from a wide range of possible concerns and opportunities to a focused set of priorities. In Canada, this view can be expanded to include critical national themes not fully captured by the SDGs – such as Indigenous reconciliation, belonging and an aging society (SDGs-Plus-3).

As you consider these issues, pay particular attention to those that are likely to have the greatest influence on your future operating environment, customers, suppliers, workforce and communities.

Some organizations may also consider global risks as an optional way of identifying societal needs (see Optional Approach: Global Risks on next page).

Aim for focus, not completeness. Your goal is to create a short list of priority societal needs – typically two to five issues or SDGs – that can later be analyzed alongside your organization's strengths. When consulting interest groups on possible focus areas, use the first 16 SDGs (excluding Partnerships for the Goals), along with the three Canadian-specific priorities if relevant.

UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS



FIGURE 12: SDGS-PLUS-3

THE PLUS 3 – CANADIAN PRIORITIES

Indigenous Reciprocity

Grounded in the United Nations Declaration on the Rights of Indigenous Peoples, this goal advances Indigenous self-determination, equity and respectful partnership. Upholding Indigenous rights is essential to building legitimate and trusted institutions, repairing relationships and enabling long-term shared prosperity. In Canada, reconciliation requires economic systems that recognize Indigenous Peoples as rights holders, honour reciprocal responsibilities, and support Indigenous-led economic, social and cultural flourishing.

Sense of Belonging

Strengthening a sense of belonging responds to Canada's growing "isolation pandemic," as social connection is now recognized as a foundational determinant of well-being that affects community resilience, workforce engagement, and the effectiveness of health and social systems.

Aging Society

Canada's aging population is reshaping labour markets, public finances and community services, making age-inclusive products, workplaces and care systems both a social priority and a major opportunity for innovation and economic participation.

OPTIONAL APPROACH GLOBAL RISKS

Understanding What the World Needs: Global Risks as Signals of Societal Need

An optional approach to identifying what the world needs, alongside the UN SDGs, is to look at the major global risks that undermine societal well-being.

Each year in January, the World Economic Forum publishes its Global Risks Report, which identifies the most significant global risks based on input from risk leaders and experts around the world.

Viewed through a social purpose lens, global risks are another way of expressing unmet societal need. They point to areas where current systems, policies or practices are falling short – and where progress would make a meaningful difference. The global risks landscape graphic brings these challenges together in a single visual.

The risks shown here reflect the 2026 edition of the report. Consult the most up-to-date version if using global risks to help frame your social purpose. When doing so, particular attention may be given to the long-term risks (10 years out), which are especially relevant when defining an enduring social purpose.

Reviewing the list of long-term societal risks can help organizations:

- Reflect on the pressures and challenges shaping today's world.
- Pinpoint which risks intersect with their business model, capabilities or influence.
- Identify areas where their social purpose could make a meaningful contribution.

Some organizations express their purpose in relation to a clear challenge they seek to address – sometimes described as a “dragon” or “nemesis,” such as the risks highlighted here. Others express their purpose in more positive terms. Both approaches are valid. What matters is not the tone, but whether the purpose responds to a real societal need and reflects a credible contribution the organization is well positioned to make.

What
the World
Needs

GLOBAL RISKS RANKED BY SEVERITY

Short term (2 years)

1. Geoeconomic confrontation
2. Misinformation and disinformation
3. Social polarization
4. Extreme weather events
5. State-based armed conflict
6. Cyber insecurity
7. Inequality
8. Erosion of human rights and/or civic freedoms
9. Pollution
10. Involuntary migration or displacement

Long term (10 years)

1. Extreme weather events
2. Biodiversity loss and ecosystem collapse
3. Critical change to Earth systems
4. Misinformation and disinformation
5. Adverse outcomes of AI technologies
6. Natural resource shortages
7. Inequality
8. Cyber insecurity
9. Social polarization
10. Pollution

Risks categories  Economic  Environmental  Geopolitical  Societal  Technological

Economic risks do not appear among the top 10 risks in either time horizon.

FIGURE 13: GLOBAL RISKS LANDSCAPE

SOURCE: WORLD ECONOMIC FORUM, GLOBAL RISKS REPORT (JANUARY 2026)

2.4 Internal and External Interest-Group Consultation

With priority issues identified, consult internal and external interest groups for input into your purpose. Draw on consultation to broaden your perspective, build alignment, strengthen relationships and uncover insights that might otherwise be missed. It builds shared ownership of your emerging social purpose and can reveal natural partners for future purpose collaboration.

Consultation Objectives

Engage to:

- Gather ideas and perspectives on where the organization could make a meaningful contribution.
- Identify blind spots and unexpected insights.
- Build interest and buy-in.
- Foster shared ownership of your emerging social purpose.
- Surface potential collaborators.
- Ensure your social purpose reflects diverse perspectives and shared values.

Before You Consult: Prepare Interest Groups

Plan ahead to avoid confusion, build trust and create the conditions for more informed and constructive input.

Take these steps:

- Plan your communications in advance so consultation does not come “out of the blue.”
- Hold introductory sessions with employees to explain the concept of social purpose, the rationale for exploring it and the overall process.
- Share simple materials in advance (e.g., a short handout, slides, intranet post or workplace poster) that describe what social purpose is – and what it is not.
- Send a clear email outlining what is coming, why it matters and how people will be involved.
- Let interest groups know ahead of time that surveys, interviews or consultations will follow, and how their input will be used.

This groundwork creates the conditions for meaningful engagement.

Define Your Consultation Focus

Use consultation to explore how your organization contributes to society today, where it could play a greater role and which societal needs are most relevant to your context. Select questions that fit your situation and use them consistently across interviews, surveys or workshops.

Use questions like these :

1. What social or environmental issues come to mind when you think about the role our sector plays in society? (Consider sharing the UN SDGs with them.)
2. **How is the world a better place because of our company?**
3. What would be lost if we disappeared tomorrow?
4. Where could we have even greater societal impact?
5. **Where could we play a greater role in the world?**

Questions #2 and #5 are especially useful for focused discussions or shorter consultations. For a more detailed list of questions, see pages 36-37.

Plan and Conduct Your Engagement

Identify your top interest groups – those **internal** and **external** to your company on whom your company's success depends. Decide who to engage and which questions and approaches to use for each group.

Internal interest groups:

- Employees
- Executive
- Owners
- Board members

Engagement methods:

- Interviews or focus groups
- Surveys or polls
- Quick pulse checks
- Department meetings or team workshops
- Town halls or all-staff discussions

Leadership Interviews

Conduct confidential interviews with senior and mid-level managers to understand their hopes, aspirations and highest ambitions – for themselves and for the company. Use the questions below to guide the discussion. Where possible, engage a third party to conduct interviews to increase comfort, neutrality and candour.

- What do you value most about this organization and its role in the world?
- What stories or experiences best reflect what this company stands for at its best?
- What motivates you personally to do your best work here?
- When you think about the future of the company, what excites you most?
- What do you believe the company could contribute to society beyond its products or services?
- What concerns or risks should be considered as the company defines its social purpose?

Group Sessions and Workshops

Design facilitated sessions to encourage dialogue and insight-sharing across roles and perspectives.

Typical design considerations include:

- Session length of two to three hours.
- Groups of six to 10 participants (internal and, where appropriate, external).
- A facilitation approach that encourages participants to challenge, stretch and build on each other's ideas.

This will create conditions for participants to experience an insight moment, or this may happen later, after the session when you are going through the results.

External interest groups:

- Customers and clients
- Suppliers, vendors and business partners
- Investors, banks or insurers
- Community groups, NGOs and advocacy organizations
- Academics, experts and thought leaders
- Regulators and policymakers
- Industry or professional associations
- Peers and competitors
- Friends and family

Be sure to involve interest groups who may be skeptical or contrary to ensure there is a range of perspectives.

Engagement methods:

- Interviews and focus groups
- Surveys or polls
- Workshops and roundtables
- Social media
- In-person meetings
- Informal conversations

One valuable opportunity is to ask customers or employees for customer impact stories that reveal your higher ideal. For example:

- When has your company gone above and beyond the expected to create a compelling value-added customer experience?
- What did your company do and how did the customer benefit?

Mining customers' own words, experiences and imagery can reveal a potent kernel of a powerful social purpose.

See pages 36-37 for additional questions to support internal and external interest-group consultation.

Interest-Group Social Purpose Consultation Questions

Here is a list of sample internal and external interest-group questions to support your social purpose consultations. The questions are offered as a guide only and should be adapted to reflect your organization's unique context, culture and work environment.

1. Internal Interest-Group Social Purpose Interview Questions

SENIOR MANAGERS

Use these questions to explore leadership intent, ambition and long-term contribution:

- When you started with the company, what was your dream for our brand or company? What greater role did you believe it could play in the world?
- What are you most proud of about the company?
- What is your vision today for the business, and what do you hope your personal legacy will be in working toward it?
- What impact do you hope to have on the world, personally?
- Why are we in business? Why does our company exist?
- What aspects of our work energize or inspire you most as a leader?

Explore future ambition and possibility:

- What could we accomplish in 10, 20 or even 100 years if all obstacles were removed?
- What legacy do we want to leave our industry and the world?
- What will future generations want to see from our industry?

Examine customers, society and opportunity:

- What social issues are being experienced by our customers, and how could we help address them?
- How might we create business opportunities by addressing a social challenge?
- Given our existing strategic priorities, how and where could addressing a social issue create added value?
- Which broader social or environmental issues do you believe are most relevant to our business and important to address?

Probe purpose and contribution:

- What human need could we meet?
- Is there a wrong we could make right, or an injustice or condition we could address through our business?
- How can we contribute to the greater good through our core business?

OTHER EMPLOYEES

Expand interviews or conversations to include employees across the organization.

Explore motivation and culture:

- Why did you join our company? Did anything stand out that made you want to work here?
- How would you describe our culture? How is it today compared with when you first joined? What is the same? What is different?
- What aspects of your work here energize or inspire you most?

Explore identity and values:

- What do you believe is most unique or distinct about our company?
- Which of your personal values do you feel align with our business values?

Invite reflection and imagination:

- If you had a magic wand and there were no obstacles, what is one thing you would change about our company?
- What is one thing you would never change?

Explore impact and meaning:

- If our company disappeared tomorrow, what would the world lose?
- Why is the world a better place because of our company?
- What is your favourite story about our company?
- Are there any social or environmental issues you feel our company is well positioned to help address?



2. External Interest-Group Social Purpose Interview Questions

Understanding societal context and expectations:

- What social issues matter to you when you think about our company's impact on you and the communities we serve?
- On which issues do you look to our company for leadership?
- What do you expect of our company in the coming years?

Perceived strengths and risks:

- What resources, capacities or strengths do you see our company having that could contribute to generating positive impact?
- Are there any areas of our business or operations that you believe are cause for concern?

Current and future impact:

- What positive impact does our business currently have on society?
- Where do you believe we could make the greatest positive impact?

Role and relevance:

- What do you see as our company's role (or mission) in society?
- How does this role (or mission) affect you or your organization?

2.5 Synthesize Your Research

In this step, you will synthesize, review and analyze findings from your research and consultation.

Identify key themes, patterns, and unique or surprising ideas. Capture compelling language, verbs and narratives that surfaced. These words and phrases often shape the social purpose statement.

Next, bring your findings together in the Venn graphic to the right. List your priority societal issues on one side and your organization's unique strengths on the other. Then identify connections and intersections – where your capabilities and influence align with society's needs. These are the areas where your social purpose will have the greatest impact.



The [Research Your Impact Opportunity](#) worksheet can help you with this exercise.

Visualize the intersection between *what the world needs* and *what your business is uniquely positioned to offer*. This intersection becomes the foundation for defining your social purpose.

FINDING YOUR PURPOSE



FIGURE 14: IDENTIFYING SOCIAL PURPOSE AT THE INTERSECTION OF SOCIETAL NEEDS AND ORGANIZATIONAL STRENGTHS

REAL-WORLD EXAMPLES OF RESEARCH SYNTHESIS

These examples show how two Canadian companies applied Step 2: Research to define their social purpose.



Social Purpose:

We exist to create connections, build community, and inspire actions that safeguard the health of the world's forests.

- Core Competencies and Assets: paper use, supply chain and printing industry role, clients and relationships with forest conservation NGOs
- Societal Issues: five SDGs (Affordable and Clean Energy, Responsible Consumption and Production, Climate Action, Life on Land, Partnerships for the Goals)
- Interest-Group Input: employees and other interest-groups shaped wording

"Now that we have defined our social purpose, Hemlock can proactively become involved in solutions that will benefit society and the planet."

– RICHARD KOUWENHOVEN, PRESIDENT & CEO, HEMLOCK PRINTERS



Social Purpose:

We exist to accelerate responsible mobility for all.

- Core Competencies and Assets: innovation, strong networks, partners, intellectual capital and experience
- Societal Issues: 11 SDGs impacted by auto industry
- Interest-Group Input: employees shaped intent and wording

"I see a lot of runway in our purpose. There is a lot of opportunity to make positive changes in the industry. Ultimately the industry is going to see the changes we're making as having a huge impact."

– DREW COLLIER, PRESIDENT & CEO, LGM FINANCIAL SERVICES

2.6 Set Purpose Priorities

With your research and synthesis complete, narrow your focus and set the stage for the creative work that follows.

Based on your company's strategic positioning, interest-group aspirations, and societal challenges and opportunities, identify a small number of promising directions for your social purpose. Identify which options could help the company address key risks, strengthen long-term relevance and enhance future commercial prospects.

At this stage, do not finalize a purpose statement. Instead, surface two or three priority directions that can be explored more deeply through ideation and business model development in the next activity.

Use these questions to guide your thinking:

- Where could your business help alleviate current or future challenges or threats facing the company and society?
- Where do societal needs intersect most clearly with your competencies and corporate strategy?
- Where can your core products, services and people make the greatest positive difference?
- On which issues could your company become a credible force for good – where growth would generate positive societal benefits while strengthening your influence and impact?
- Where could investment in a social purpose help attract and engage customers, employees, partners, investors or communities – and enable them to become ambassadors?
- On which topics could your company generate new business, products or markets while managing risks, reducing costs or unlocking innovation?
- Is there a clear “nemesis” or challenge your organization and interest groups are motivated to address – a unifying rallying point for action?

To guide prioritization, assess how each potential purpose direction creates business value and reduces exposure to risk. Focus on areas where your organization has credibility and strength – where its skills, relationships, expertise and knowledge create a distinctive opportunity to contribute.

With two or three priority purpose directions identified, you are now ready to translate that insight into social purpose language.

Tips for Success

- Before consultation, ensure participants understand what social purpose means and why your organization is exploring it.
- Provide a short overview of potential business benefits so conversations remain informed and constructive.
- Encourage openness – challenge assumptions and invite new ideas.
- Capture compelling language to inform the final purpose statement.

Worksheet

Use this [Research Your Impact Opportunity](#) worksheet to help you compile insights related to organizational context, interest-group perspectives, societal challenges and core capabilities.



Moving to Step 3: Define

With your research complete and your organization's strengths mapped against societal needs, you're now ready to move to **Step 3: Define**. This stage focuses on translating what you've learned into a social purpose that is authentic, credible and uniquely your own.

The following video is a recap of the key concepts introduced in this section.

Resource

Video

[Defining Your Social Purpose Statement: Part I](#)

Defining Your Social Purpose

You're now ready to define your purpose statement. In this section, you will translate what you've learned into clear, compelling language that expresses why your organization exists and the positive role it plays in society.

This section builds on the research and consultation completed in Section 1 and covers **Step 3** of the [Social Purpose Roadmap](#). It focuses on definition – bringing together research insights through a social purpose workshop to articulate, test and formally adopt a clear and credible social purpose statement.

Step 3: Define

Step 3 shifts from discovery to articulation. This stage synthesizes your insights – what society needs, your organization's strengths and interest-group perspectives – into a clear, credible social purpose statement. Through workshops and testing, you'll craft language that captures your reason for being and guides long-term strategy.

Qualities of an Effective Social Purpose Statement

An effective social purpose sits at the intersection of *what the world needs* and what your business can *uniquely contribute*.

The overlap between these two areas is where a credible and differentiated social purpose takes shape.

Authentic statements reflect these four core qualities:

1. **Defines your core reason for being:**
Goes beyond profit to serve a higher purpose that creates value for society.
2. **Focuses on pro-social impact:** Contributes tangible benefits to people and/or the planet in ways linked to your strategic strengths.
3. **Is not a marketing tool or CSR initiative:**
It's the company's reason for existence, not a campaign or program.
4. **Starts with "We exist to ...":** Begins with an action verb followed by the positive societal outcome the company seeks to achieve.

Step 3 At a Glance

- Hold social purpose workshop.
- Draft, test and finalize statement.
- Get governing body approval.
- Update staff.

Use these 10 criteria to ensure your purpose is credible, inspiring and actionable:

1. **Relevance:** Specific to your business and industry
2. **Society:** Addresses a societal issue beyond your products or customers
3. **Legacy:** Ties to your founding story or enduring motivation
4. **Bold:** Meaningful, ambitious and emotionally resonant
5. **Inspirational:** Encourages others to join your effort for positive change
6. **Succinct:** Short enough to be easily remembered across the organization; avoid jargon
7. **Creative:** Distinctive and memorable in language and idea
8. **Positivity:** Framed in optimistic, energizing language
9. **Authenticity:** Grounded in values and lived behaviours
10. **Feasibility:** Leverages your organization's unique abilities and assets

Crafting Your Social Purpose Statement

3.1 Hold Social Purpose Workshop(s)

Bring together a cross-section of leaders and employees (e.g., your Social Purpose Steering Committee) to:

- Review research insights: purpose statement scan preferences, company background key considerations, strengths to leverage, consultation results, priority societal issues and research synthesis Venn graphic.
- Explore the intersection of societal needs and your business's strengths.

3.2 Draft Social Purpose Options

Develop several social purpose options in your workshop(s) and refine them over more than one session before selecting a preferred option.

Evaluate and refine your options using the [Social Purpose Statement Criteria](#). Keep notes during the process, as they will help you describe and communicate your choices later.

Share your top options with trusted interest groups and leadership for feedback, then narrow to your strongest option before moving forward.

SOCIAL PURPOSE STATEMENT BUILDER

Use this table to experiment with structure and language.

Try varying the verbs, focus areas or intended impacts until one feels authentic and inspiring.

	Inspiring Action Verb	Interest Group/Effect	Added Mechanism (optional)	Intended Impact
E.g., Our credit union exists to...	foster	community flourishing	through financial empowerment for	a thriving community.
Option 1				
Option 2				

FIGURE 15: SOCIAL PURPOSE STATEMENT BUILDER TEMPLATE

Choosing a Bold Purpose

An aspirational social purpose is meant to endure and to motivate – not to be achieved all at once or by your organization alone. It sets a long-term direction and invites others to contribute.

Over time, collaboration with partners, peers and communities is how purpose becomes real and scalable. You are not expected to have all the answers at the outset.

The next phase, Phase 2 (Plan, Embed, Collaborate and Report), supports this work by helping translate aspiration into action, build partnerships and track progress.

Verbs Matter

Verbs set the tone and energy of your purpose. Choose yours carefully. Perhaps one of your interest groups came up with something inspiring – check your notes for ideas.

Consider these examples:

- Transform
- Inspire
- Uplift
- Unlock
- Empower
- Elevate
- Mobilize
- Ignite
- Revolutionize
- Spark
- Forge
- Regenerate

3.3 Draft Your Social Purpose Narrative

Once you have your draft social purpose statement(s), supplement it with a one- to two-paragraph social purpose narrative (sometimes called a manifesto or charter) – an explainer that makes your purpose clear, actionable and meaningful. This narrative clarifies what the words in your statement mean and how the purpose creates value for your organization, interest groups and society. It answers key questions, builds buy-in, and frames your vision, strategy and departmental action plans. It provides essential context – explaining why this purpose matters, how your business will deliver it and what success looks like – turning an abstract statement into a compelling story that inspires action and trust.

It typically appears under your purpose statement on websites, annual reports and key communications, helping customers, investors, partners and other interest groups understand your purpose. It serves as a foundational communication tool for introducing your purpose, mobilizing others around it and, over time, supporting your social purpose collaboration efforts and purpose disclosures as you begin reporting on your progress.

PURPOSE IN PRACTICE

Quinn+Partners – Developing a Social Purpose Narrative

Professional services firm **Quinn+Partners** expresses its purpose as: “**We empower business to realize a sustainable future.**”

To help interest groups understand what this means in practice, the firm provides a short purpose narrative explaining the intent behind the words and the impact it seeks to create.

- **Empowerment** reflects its role in equipping clients with insight, advice and confidence to take action
- **Realization** captures both illuminating a path forward and enabling organizations to pursue it.
- **Business value** recognizes that helping companies create and protect value is central to their work.
- **Positive impact** reflects its goal of contributing to better outcomes for both clients and society.

By explaining the meaning behind the statement, the firm helps interest groups understand how its purpose connects to the services it provides and the broader impact it seeks to achieve.

Read more [here](#).

Your purpose narrative brings your purpose statement to life, giving it direction and emotional power. A strong narrative explains not only what your purpose is, but also why it matters, how your organization believes change happens and the unique role it will play in creating that change. The prompts below will help you develop a narrative that inspires confidence, builds understanding and guides action.

Use these prompts when drafting your social purpose narrative, pulling ideas from your workshop insights and research notes:

Show value created. Explain how your purpose benefits

- 1) the organization (e.g., resilience, innovation, talent),
- 2) customers or clients (e.g., values alignment) and
- 3) community/society (e.g., broader impact).

Clarify the meaning. Explain what each key word, phrase or term in your statement means and why you chose them. Translate abstract language into specific, relatable ideas.

Describe your unique contribution. Identify the distinctive ways your organization – through its assets, capabilities and influence – will contribute to solving the issue or driving positive outcomes.

Explain why it matters. Articulate the urgency and relevance of this purpose today. What problem or opportunity demands your organization’s leadership and action?

Connect to your business model and strategy. Illustrate how this purpose aligns with what you do best and how it will guide decision-making, innovation, and long-term growth. Demonstrate that purpose is key to helping your organization grow and drive impact.

Evoke emotion and inspiration. Use accessible, plain language that sparks curiosity and belief. The goal is to inspire pride internally and trust externally. This builds internal understanding and emotional connection, enrolling interest groups in fulfilling your purpose.

Express your beliefs or theory of change. Describe the worldview or core belief that underpins your social purpose. What truth or conviction about people, community or the planet makes this purpose necessary? How do you believe change occurs, and what role does your company play in that process? This can be expressed in text and/or as a flowchart or diagram (see examples on the next page).

For inspiration, review the Coast Capital and Armour Valve social purpose theories of change below. They illustrate how a clear belief system connects a social purpose to the actions an organization takes and the outcomes it seeks to create.

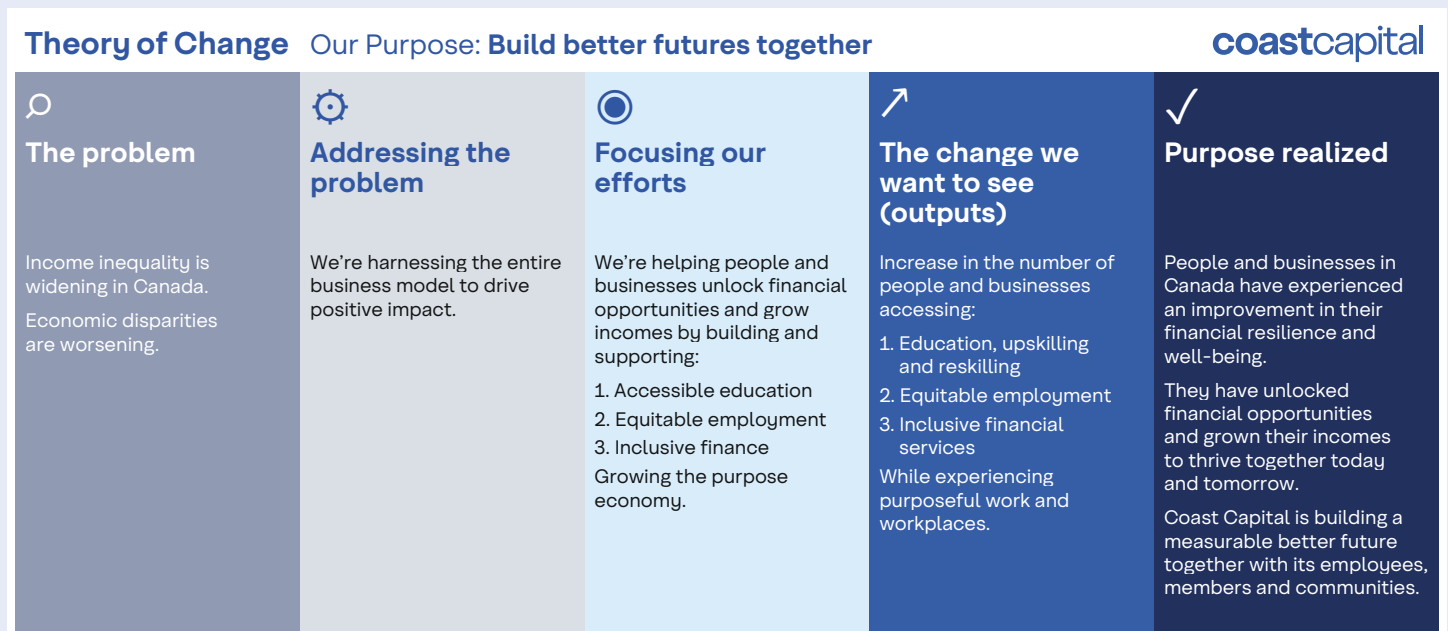


FIGURE 16: COAST CAPITAL'S SOCIAL PURPOSE THEORY OF CHANGE

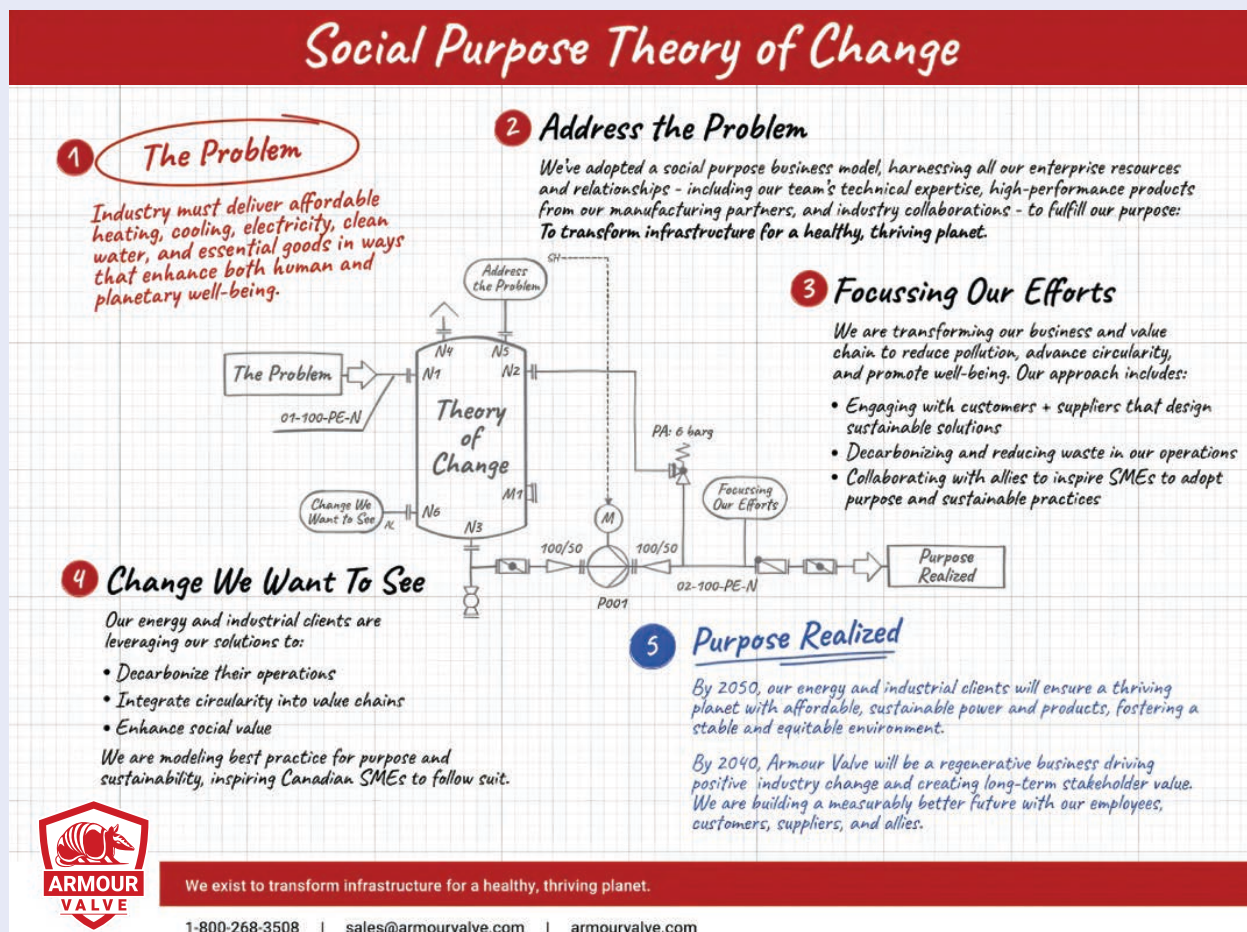


FIGURE 17: ARMOUR VALVE'S SOCIAL PURPOSE THEORY OF CHANGE

3.4 Engage Interest Groups to Validate Your Purpose

Before finalizing your social purpose, test the draft purpose statement and supporting narrative with a small group of trusted internal and external interest groups. Use this step to sense-check, strengthen and refine your purpose before formal approval.

Testing at this stage is intended to:

- Assess credibility, relevance and fit.
- Identify gaps, confusion, red flags or unintended interpretations.
- Strengthen clarity, focus and resonance.

Approach testing through two complementary lenses: internal validity and external resonance.

Internal Validity

Begin by testing the draft internally. Ask questions such as:

- Does this draft align with what the organization does today, and does it provide a flexible foundation for the future?
- Is the business model clearly reflected in the purpose?
- Are there any contradictions with core activities that are essential and unlikely to change?
- Does it align with what you heard through research and consultation, and is it likely to resonate internally?

This internal check ensures the purpose is grounded, realistic and usable as a guiding reference.

External Resonance

Next, test the draft with external interest groups. Where possible, include some individuals who were not involved in developing the statement, in addition to those already consulted. Gather feedback to assess:

- What is the initial “gut” reaction?
- Does the statement meet the [Social Purpose Statement Criteria](#)?
- Are there any potential red flags or concerns?
- Is it likely to inspire engagement and action?

External input surfaces blind spots, tests clarity and shows how the purpose lands beyond the organization.

“Critical Friends” Feedback

Finally, invite a small group of critical friends to provide candid and constructive feedback. Critical friends are individuals who:

- Understand your business or sector.
- Are aligned with your values, intent and success.
- Are willing to challenge assumptions and ask hard questions.
- Can offer honest feedback without personal or political stakes in the outcome.

Critical friends may include selected employees, trusted partners, sector peers, community leaders or advisors.

Provide them with:

- The draft social purpose statement.
- The draft social purpose narrative.
- Brief context on how the purpose will be used.

Ask them to assess whether the purpose:

- Feels authentic to who your business is.
- Reflects a meaningful societal contribution.
- Is clear, understandable and credible.
- Could realistically guide decisions and priorities.

Use critical friends to validate and refine the purpose, not to reach consensus. Use feedback to strengthen and clarify the purpose – not to reopen fundamental questions that were addressed during research and drafting. In some cases, hearing different perspectives reinforces confidence in the purpose already taking shape and no changes are required.

3.5 Approve the Social Purpose Statement

Once refined, bring your social purpose statement and supporting narrative to the highest governing body – typically the board of directors, owners or equivalent governing authority – to ensure understanding and support and to receive formal approval.

Formal approval matters because it:

- **Confirms accountability** at the highest level, anchoring social purpose as a core directive that informs strategy, decisions and resource allocation.
- **Creates clarity and alignment**, giving leaders and teams a common reference point for decision-making, risk management and communications.
- **Signals readiness to move forward**, enabling those responsible for implementation to begin embedding purpose across operations, partnerships and disclosure.

Official adoption marks the transition from exploration to execution.

Reaching this point is a significant milestone. You have clarified why your organization exists and the societal contribution it seeks to make – and created a foundation for what comes next. Some organizations mark this moment by signing [A Call to Purpose](#) (see below).

Following approval, make the purpose statement and supporting narrative publicly accessible (e.g., on your website or in public communications) so customers, partners and other interest groups can clearly understand it.

Indigenous Purpose in Action

Cheekbone Beauty, founded by Anishinaabe entrepreneur Jenn Harper, is an Indigenous-owned cosmetics brand grounded in representation, healing and cultural pride, with a mission to uplift Indigenous youth and ensure they feel seen and valued. Cheekbone gives 10% of profits to Indigenous education initiatives, integrates Indigenous teachings such as the **Seven Grandfather values** and the **Seventh Generation Principle**, and leads in clean, low-waste, sustainable beauty practices including compostable packaging and waterless formulations. The company blends cultural storytelling with circular design and environmental stewardship to redefine beauty through Indigenous values.

3.6 Update Staff

After approval:

- Communicate the purpose across the organization.
- Explain why it matters and what comes next.
- Set expectations for how purpose will shape decisions and priorities.
- Create opportunities for questions, discussion and early involvement.

This step bridges *definition* and *implementation*.

Marking the Milestone: A Call to Purpose

You've reached an important moment. With your social purpose approved, your organization has clearly articulated why it exists and the societal contribution it seeks to make.

Some organizations choose to mark this milestone by signing A Call to Purpose – a public expression of support for building a purpose-driven economy in Canada, led by the Canadian Purpose Economy Project.

A Call to Purpose has been signed by over 500 leaders and organizations and counting, including CEOs, senior leaders, professionals, civil society organizations and others working to advance the Purpose Economy.

Signing A Call to Purpose is voluntary. It is not a certification or a performance claim. Rather, it is a way to signal alignment with the principles of social purpose and, if you wish, to encourage peers, colleagues and others in your network to do the same.

To sign or learn more, visit [A Call to Purpose](#).

Moving to Phase 2: Implement Your Social Purpose – Step 4: Plan

With your social purpose statement defined, tested, approved and communicated to staff, Phase 1: Develop is complete. Your organization now has a credible North Star ready to be brought to life through the [Plan](#), [Embed](#), [Collaborate](#) and [Report](#) steps of **Phase 2: Implement**. This phase focuses on putting your social purpose into practice by embedding it across your organization, collaborating with others to extend its impact, and reporting on your progress to strengthen accountability, learning and continuous improvement.

PHASE 1

Social Purpose Progress

Use the [Social Purpose Assessment Tool](#) to assess your current state. By completing **Phase 1 (Develop)**, you've made measurable progress:

Business Model (Practice 1): Clear and Compelling Purpose: Our purpose is distinctive, motivating and relevant to our business. It addresses a local or world need and concisely and unambiguously communicates why we exist.

Business Model (Practice 2): Purpose Narrative and Story: The purpose is supported by a narrative used on a variety of platforms explaining its meaning, relevance and value to the business, customers and society and is publicly accessible.

Governance and Leadership (Practice 8): Purpose Leadership: Our board, shareholders and/or owners actively and publicly support our purpose and regularly monitor our progress on it.

Next Steps Preview

Phase 2 (Plan, Embed, Collaborate and Report) advances practices across all seven of the business functions in the assessment tool.

Download the full [Social Purpose Assessment Tool](#) to baseline your progress and set five-year ambitions.



Tips for Success

- Anchor your purpose in evidence from research and consultation.
- Be open to a bold, aspirational purpose.
- Pay attention to compelling words and verbs that surface.
- Use a narrative to explain what the purpose means and how it creates value.
- Have the purpose adopted by the highest governing body.

Worksheet



Use the [Craft Your Social Purpose](#) worksheet to synthesize your research findings into a clear social purpose statement and supporting narrative.

The following resources provide additional guidance, examples and practical inspiration as you finalize your social purpose statement and prepare to implement it.

Resources

Toolkits and Guides

[Social Purpose Statement Criteria](#)

[Sample Social Purpose Statements](#)

Case Studies

[Return-It \(pdf\)](#), [\(video\)](#) | Industry-owned, product stewardship organization

[LGM Financial Services \(pdf\)](#), [\(video\)](#) | Automotive financial services company

[Hemlock Printers \(pdf\)](#), [\(video\)](#) | Commercial printer (digital, offset, fulfillment)

Videos

[Introduction to Social Purpose and the Social Purpose Business Case](#)

[Defining Your Social Purpose Statement: Part I](#)

[Defining Your Social Purpose Statement: Part II](#)

PURPOSE IN PRACTICE FIRSTONTARIO CREDIT UNION – DEFINING ITS SOCIAL PURPOSE

After consulting internal and external interest groups, FirstOntario’s social purpose steering committee sifted through feedback for unique insights. One interest group had commented that the credit union unites communities across its locations. An executive immediately connected: “Unite has been core to our identity for years.” This sparked consensus around “uniting communities” – unlocking the full statement.



FIGURE 18: HOW FIRSTONTARIO CREDIT UNION IDENTIFIED ITS SOCIAL PURPOSE

We exist to Unite Communities for a Sustainable Future

OPTIONAL APPROACH CENTRING ORGANIZATIONAL PASSION IN YOUR SOCIAL PURPOSE

As you finalize your social purpose, you may wish to explore an additional lens to test and refine your thinking. While this toolkit focuses on defining purpose at the intersection of what the world needs and what your organization is uniquely positioned to contribute, some organizations incorporate a third dimension: organizational passion.

This three-part lens complements the core approach in this toolkit and can help surface a purpose that is both strategically grounded and deeply motivating.

The Three-Part Lens

This approach brings together three intersecting elements:

1. **Passion:** what inspires and motivates your leaders and employees; the values, aspirations and convictions that energize your organization
2. **Proficiency:** what your organization does best; your capabilities, assets, expertise and strengths
3. **Problem:** a meaningful societal or environmental issue that requires attention

When This Approach May Be Useful

This approach may be particularly helpful:

- For founder-led or values-driven organizations.
- Where leadership motivation is a strong driver.
- Where teams want to explicitly connect purpose to what inspires them personally.

You may choose to use this lens alongside the core approach in this toolkit – or as a way to further refine your final purpose statement.

PASSION AS A LENS FOR SOCIAL PURPOSE

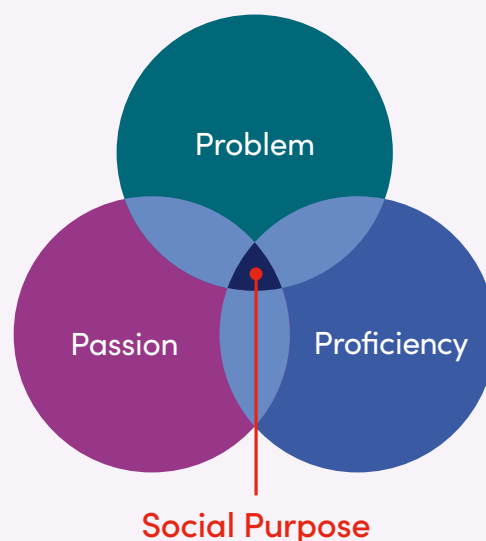


FIGURE 19: MAPPING PASSION, PROFICIENCY AND PROBLEM (ADAPTED FROM JUNXION STRATEGY’S PASSION-PROFICIENCY-PROBLEM MODEL, 2024)

Phase 2

Implement Your Social Purpose

Bring your social purpose to life across your business and in collaboration with others.



Implement Your Social Purpose

Phase 2 puts your organization's social purpose into practice – translating your approved purpose into decisions, plans and ways of working that guide how the business operates. Through intentional planning, internal embedding and cultural alignment, this phase enables your purpose to shape priorities, actions and outcomes across the organization, laying the groundwork for impact and growth.

The Implement phase builds on the work completed in the [Develop](#) phase of the Social Purpose Toolkit, where organizations explored their impact opportunity and defined their social purpose.

There are three sections in this phase:

PLAN AND EMBED

Section 3: Planning and Embedding Your Social Purpose focuses on planning for execution and building the governance and cultural foundations so purpose is lived.

COLLABORATE

Section 4: Collaborating Beyond Your Organization focuses on working with partners and interest groups to extend impact and scale change.

REPORT

Section 5: Reporting, Learning and Improving focuses on monitoring performance, communicating progress, and using insight to refine and improve how purpose is delivered.

Begin the work by building your social purpose implementation plan.

Phase 1 Develop Your Social Purpose			→ Phase 2 Implement Your Social Purpose			
1 EDUCATE	2 RESEARCH	3 DEFINE	4 PLAN	5 EMBED	6 COLLAB.	7 REPORT
- Educate management and board on social purpose - Gain agreement to proceed - Agree on company's business case and rationale - Update staff - Recruit social purpose steering committee	- Research company background - Identify unique strengths to leverage - Shortlist community or societal issues - Consult interest groups on focus and greater good potential	- Hold social purpose workshop - Draft social purpose options - Draft social purpose narrative - Engage interest groups to validate your social purpose - Approve social purpose statement - Update staff	- Renew steering committee - Create a Social Purpose Implementation Plan - Include social purpose oversight in Board governance documents (if relevant)	- Educate and engage employees - Embed social purpose in culture and operations - Update vision and corporate strategy with social purpose goals - Embed social purpose in products and services	- Embed social purpose in customer experience - Prioritize and engage interest groups - Build external social purpose collaborations - Advance the Purpose Economy	- Regularly review performance - Implement regular purpose storytelling and communications - Update website and marketing strategy - Establish data collection and management - Disclose purpose progress through annual report

Planning and Embedding Your Social Purpose

Once your social purpose is defined, tested and approved, the work shifts from articulation to action. Section 3 focuses on setting up your organization to implement its social purpose deliberately and consistently, and on beginning the work of integrating it into how the business operates.

This section covers **Steps 4 and 5** of the **Social Purpose Roadmap**. It starts with planning – putting the right governance, structures and plans in place and then moves into embedment, where purpose is integrated into the organization's culture, operations and strategy.

Step 4: Plan

Step 4 establishes the conditions for implementation. This includes leadership structures, governance oversight and a one- to three-year implementation plan.

In the seven-step roadmap, Step 4: Plan bridges purpose definition and embedment. It ensures that social purpose does not stall after approval, and that your business is set up to integrate its purpose in a deliberate and coordinated way.

Thoughtful planning also safeguards authenticity. Clear roles, measurable actions and transparent reporting reduce the risk of misalignment between stated purpose and actual practice, strengthening credibility with employees, customers and other interest groups.

The graphic on the next page is a refresher on how, after adopting a social purpose, your organization begins to embed it. **It shows the organizational systems that support social purpose integration** – together forming your social purpose management system – and can be shared internally to orient people to what's coming next.

Before moving into the core planning steps, pause and take stock of how your social purpose is currently showing up across your organization.

Step 4 At a Glance

- Renew or establish a Social Purpose Steering Committee.
- Create Social Purpose Implementation Plan.
- Review organizational structure.
- Establish governance mandate.

Optional Social Purpose Implementation Scan

If your organization adopted its social purpose some time ago, use the Optional Social Purpose Implementation Scan on page 52 to assess where it should show up more strongly and build momentum.

4.1 Renew or Establish a Social Purpose Steering Committee

Once your social purpose has been defined and approved, it needs a clear leadership mechanism to guide and oversee its implementation.

If you already had a group supporting the development of your social purpose, renew it now as a **Social Purpose Steering Committee**. If you do not yet have such a committee in place, this is a good time to set one up.

Typical members may include representatives from areas such as Human Resources, Operations, Strategy, Finance, Marketing/Customer Experience and Sustainability/ESG (where applicable), along with one or more senior leaders to ensure alignment and accountability.

SOCIAL PURPOSE MANAGEMENT SYSTEM

Purpose aligns the strategic framework and is embedded in foundational elements.



FIGURE 20: THE ORGANIZATIONAL SYSTEMS SUPPORTING SOCIAL PURPOSE INTEGRATION (ADAPTED WITH INPUT FROM COAST CAPITAL)

The Social Purpose Steering Committee plays a central role in **advancing, coordinating and overseeing** how social purpose is implemented across the organization and in its relationships. It translates purpose into priorities, guides integration into strategy and operations, and supports collaboration and accountability for progress.

The committee is typically responsible for:

- Advising on priorities, goals and initiatives related to social purpose.
- Supporting integration of purpose into strategy, policies, programs and decision-making.
- Prioritizing initiatives and allocating attention and resources.
- Overseeing internal and external purpose communications.
- Fostering cross-functional coordination and information-sharing.
- Overseeing external collaborations that advance the organization's purpose.
- Monitoring progress and ensuring appropriate accountability mechanisms are in place.

An executive sponsor should lead the committee. In a small business, this may be the owner. Clear executive leadership reinforces accountability and signals that social purpose implementation is a leadership priority.

The steering committee supports leadership and coordination; it does not replace management's responsibility for execution. Day-to-day implementation remains the responsibility of leaders and teams across the organization.

For detailed guidance, including a draft terms of reference that can be adapted to different organizational contexts, see the [Social Purpose Steering Committee Guide](#).

OPTIONAL APPROACH SOCIAL PURPOSE IMPLEMENTATION SCAN

If your organization adopted its social purpose some time ago and is now ready to put it into practice more deliberately, this simple scan gets you started.

It offers a simple way to pause, take stock of how your purpose is (and isn't) showing up in day-to-day work and identify a few actions to take right away – as you prepare for more formal implementation planning.

How to Use This Scan

Bring together a small group of leaders and staff representing key areas of the business.

Use the chart below to respond to the **action questions** across the different lenses (as leaders, as a team and as an organization). Capture ideas individually or as a group, and discuss what to keep doing, do better, start doing or stop doing. To build momentum and quick wins, tackle important small actions right away and reserve the rest for your Social Purpose Implementation Plan. This formal plan – developed next – provides the structure and sequencing needed for more significant or resourced changes.

Action Questions	As Leaders	As a Team	As an Organization
What are we doing well on our purpose now?			
What are we doing that could be modified to better align with our purpose?			
Where are decisions being made without clear reference to our purpose?			
What are we not doing on our purpose that we could be doing?			
What should we stop doing as it gets in the way of our purpose?			

Indigenous Purpose in Action

Rise Consulting is an Indigenous-owned, B Corp-certified management consultancy founded by Annie Korver (Métis Nation) to advance Truth, Reconciliation and Indigenous inclusion across Canada by fostering meaningful, trust-based relationships between Indigenous and corporate communities. Its purpose, “**to support the rising presence of Indigenous Peoples in Canada,**” is delivered through Truth and Reconciliation Roadmaps and Action Plans, leadership and governance advisory, Indigenous procurement and workplace strategies, and community-guided engagement processes. The firm donates one-third of its annual profits to Indigenous communities and organizations, reflecting its commitment to social impact and economic reconciliation.

4.2 Create a Social Purpose Implementation Plan

With the steering committee renewed, create a **Social Purpose Implementation Plan** to organize and phase the work.

The [Social Purpose Assessment Tool](#), introduced in the Develop phase of the toolkit, is a useful resource to support this task. It is organized into **seven core practice areas**, covering a total of **50 practices**:

1. Business Model
2. Governance and Leadership
3. People and Culture
4. Operations
5. Customer Experience and Marketing
6. Business Ecosystem
7. Monitoring and Reporting

Three of these practices were reflected in the Develop phase:

- Business Model (Practice 1):
Clear and Compelling Purpose: Our purpose is distinctive, motivating and relevant to our business. It addresses a local or world need and concisely and unambiguously communicates why we exist.
- Business Model (Practice 2):
Purpose Narrative and Story: The purpose is supported by a narrative used on a variety of platforms explaining its meaning, relevance and value to the business, customers and society and is publicly accessible.
- Governance and Leadership (Practice 8):
Purpose Leadership: Our board, shareholders and/or owners actively and publicly support our purpose and regularly monitor progress on it.

The Implement phase will help you work through the remaining 47 practices, supporting deeper integration.

For each practice area, the assessment tool includes a **baseline year** and a **five-year ambition**. Working through the assessment clarifies the different elements involved in implementing a social purpose. It also builds alignment on your current state of purpose integration and where you would like to be in five years.

The assessment's value lies in building shared understanding and informing priority-setting.

Use the assessment to:

- Determine the company's current state of purpose integration.
- Identify priority practice areas to focus on first.
- Clarify where the organization wants to be over the longer term.
- Decide what progress should look like over time.
- Sequence actions in a realistic, stepwise way.

The steering committee typically completes the assessment, but ideally it should **consult colleagues across the organization**, drawing on the insights of leaders, managers and staff who are closest to different parts of the business.

After aligning on the current state assessment and five-year ambition, use the tool to develop a **three-year Social Purpose Implementation Plan**.

You will likely notice that even if your organization has only recently adopted its social purpose – and especially if it did so a year or more ago – you will already have achieved a number of purpose-related activities.

As this work moves forward, your company will be shaping a new future while continuing to run the core business. Staff will need to reimagine how the company operates while still generating the revenues and margins required to achieve your social purpose.

The Importance of a Roadmap

One of the most common challenges during transformation programs is companies having the patience and discipline to roadmap, prioritize and sequence work to ensure they have the focus and resources needed to follow through. The saying “start less, get more done” often proves true!

The [Social Purpose Assessment Tool](#) helps you do just that – turning your priorities and ambitions into a practical, phased implementation plan.



Illustrative Approaches to Building a Three-Year Social Purpose Implementation Plan

Use these examples to see how smaller and larger organizations might translate their assessment results into a three-year Social Purpose Implementation Plan.



Simple Approach for a Smaller Organization

This is one way a smaller organization might use the assessment tool to create a three-year plan.

Year 1 priorities:

- Provide purpose education to management and ownership.
- Embed purpose into governance structures and make it a standing item on meeting agendas.
- Incorporate purpose into employee experience and culture.
- Align existing sustainability or community investing initiatives to the purpose.

Year 2 priorities:

- Design purpose goals and metrics for integration into business strategy and bonuses or rewards.
- Implement purpose KPIs into incentive structure.
- Update corporate values, vision and mission to reflect the purpose.
- Embed purpose into customer experience and marketing.
- Introduce suppliers to social purpose and update Supplier Code of Conduct to align with purpose objectives.
- Evaluate progress and introduce continuous improvement measures.

Year 3 priorities:

- Report on purpose progress using purpose disclosure standards.
- Establish a multi-year purpose collaboration with key interest groups.
- Conduct an internal review of purpose integration.
- Renew the three-year integration plan.

Comprehensive Approach for a Large Organization

Organizations with greater scale or complexity may choose a more detailed approach. Below is an example of how a larger organization might translate the **Governance and Leadership** practices into a three-year implementation plan, starting with the company's overall assessment targets, of which Governance and Leadership is one component.

The example below assumes the organization has completed the [Social Purpose Assessment Tool](#) and established a baseline score across all practices. The targets illustrate how a company might set progressive improvement goals over several years based on its desired level of purpose integration.

Assessment targets:

- FY baseline score: X%
- FY + 1 target score: X%+
- FY + 2 target score: X%++
- FY + 3 target score: X%+++

Governance and Leadership Initiatives

FY + 1 – target score of X+:

- **Provide education to board and executives:** Hold purpose education session for the board and senior management.
- **Implement an interest-group engagement framework:** Create an implementation framework that sets out how our company will collaborate with interest groups on our purpose.
- **Implement an executive social purpose performance objective:** Include at least one performance objective related to social purpose for all senior leaders.
- **Update and trial the purpose section of the board template:** Enhance executive and board templates to drive social purpose innovation across all divisions.

- **Obtain board approval of the Social Purpose Three-Year Integration Roadmap and targets to FYX:**

Approve a roadmap for our social purpose integration for FYX – FYXX, providing a plan for action, integration and accountability.

- **Include a social purpose metric in the CEO's performance objectives:**

Incorporate a measurable social purpose metric into the CEO's performance objectives and incentive plan to ensure alignment of executive leadership with our social purpose goals.

FY + 2 – target score of X++:

- **Create a Social Purpose Steering Committee:** Create a cross-functional working group made up of key decision makers and subject matter experts, responsible for overseeing social purpose initiatives, supporting alignment with social purpose, corporate vision and strategic goals and facilitating cross-functional collaboration.
- **Develop a Social Purpose Toolkit for executives and senior Leaders:** Develop practical resources, including tailored messaging for each division, to support leaders in embedding social purpose into their everyday operations, decision-making, relationships, behaviours and presentations.
- **Implement social purpose performance objectives and incentives for all managers:** Extend the requirement to include at least one social purpose-related performance objective to managers.

FY + 3 – target score of X+++:

- **Implement social purpose performance objectives for all employees:** Extend the requirement to include at least one social purpose-related performance objective to all employees.

Governance and leadership outcomes:

- A clear roadmap outlining our strategic initiatives and goals for the next three years is established and guides staff efforts to advance our social purpose and corporate vision.
- An active and engaged Social Purpose Steering Committee oversees and drives social purpose initiatives, ensuring alignment with strategic goals. Success will be evident through regular meetings, strategic decision-making and visible leadership engagement.
- Purpose leadership competencies are consciously cultivated.
- Governance and leadership structures lead to continuous improvement and engagement.
- The board is equipped to have effective purpose governance oversight and has received recognition for its purpose governance practices.
- **Our leaders are role-modelling social purpose to peers;** we are a social purpose role model in our professional and industry groups.
- We achieved the Social Purpose Three-Year Integration Roadmap targets.

Governance and leadership criteria outstanding in FY + 3:

- **Purpose is a key factor in our innovation and R&D processes;** we collaborate with third parties to pilot and scale purpose-centric innovations (3/5).
- Our subsidiary companies and joint venture partnerships demonstrate our purpose (3/5).

4.3 Align Roles and Responsibilities to Your Social Purpose

Leaders set the tone for integrating social purpose across the organization. This step clarifies – and where needed, adjusts – how existing roles support your social purpose in practice.

The aim is alignment, not restructuring. Most organizations do not need to change reporting lines or create new teams. Instead, they identify where purpose should show up in existing roles and decision-making.

Phase these adjustments within your three-year Social Purpose Implementation Plan, starting with executive role clarity in Year 1 and expanding as implementation deepens.

4.4 Integrate Social Purpose Into Executive Roles

Start by integrating social purpose into executive and senior leadership roles. This makes it clear that purpose is a core leadership responsibility, not a parallel initiative.

Use the [Guide to Executive Social Purpose Roles](#) to identify how purpose can be reflected in roles such as the CEO, VP Finance, VP HR, etc.

For example:

- **CEO** ensures social purpose informs growth priorities and long-term strategy, sets expectations and represents the organization's purpose externally.
- **VP Finance** aligns financial decision-making, budgeting, investment and reporting with purpose priorities.
- **VP HR** embeds purpose into culture, HR policies, leadership development and performance objectives.

These responsibilities do not need to be implemented all at once. They can be phased in, aligned with the organization's maturity and capacity.

4.5 Establish Roles to Coordinate Implementation

In addition to executive leadership, many organizations establish **dedicated roles that coordinate and support implementation** across functions. These roles complement – rather than replace – existing structures such as the Social Purpose Steering Committee.

Drawing from the [Guide to Social Purpose Job Descriptions](#), options may include:

- **Chief Social Purpose Officer (CSPO)**: typically reports to the CEO; responsible for overall purpose strategy, integration, partnerships, board liaison and external leadership.
- **Social Purpose Director**: responsible for executing the Social Purpose Implementation Plan, advancing innovations and coordinating cross-functional teams.
- **Social Purpose Coordinator**: supports projects, internal social purpose communications and training, and tracking progress.

Some organizations create a **social purpose unit** to centralize coordination and support consistent implementation. Frequently, this replaces and integrates the work of established CSR, ESG or sustainability units.

Adapt Structure for Smaller Organizations

Smaller businesses, or those without formal executive teams, can take a more streamlined approach.

Rather than creating new roles, designate a **purpose lead** – often the owner, general manager or operations lead – to coordinate implementation. This role:

- Champions purpose in everyday decisions.
- Assesses the effectiveness of purpose actions using KPIs.
- Tracks progress using the Social Purpose Assessment Tool.
- Reports regularly through leadership or management meetings.

For example:

- The **owner/CEO** integrates purpose into strategy and customer relationships.
- An **operations lead** embeds purpose into supplier choices and team practices.
- A **small steering committee** (typically two to four people) provides accountability and shared ownership, without requiring full-time hires.

As with larger organizations, responsibilities can expand gradually as the business grows and implementation matures.



How Companies Are Structuring Social Purpose Roles

Libro Credit Union

Director, Purpose Integration

Social Purpose Specialist

Coast Capital Savings

VP, Social Purpose

Senior Manager, Purpose

and Climate Performance

*Senior Manager,
Social Purpose Innovation*

*Senior Manager, Social
Purpose Ecosystems*

BCLC

Chief Social Purpose

Officer and VP Marketing

*Director, Purpose,
Partnerships and Engagement*

*Manager, Social Purpose
and Engagement*

*Senior Specialist, Social
Purpose and Engagement*

4.6 Formally Integrate Purpose Into Board Mandate (if applicable)

The board is the ultimate custodian of the organization's purpose. It is responsible for ensuring the organization's social purpose is embedded in corporate strategy, CEO terms of reference and performance objectives, executive incentives, enterprise risk management, capital allocation, culture and purpose disclosures.

If you do not have a board or formal governance structure, proceed directly to the next step: [Embed](#).

Once your social purpose has been approved, update your governance policies to make the board's role in purpose oversight explicit (often referred to as **Purpose Governance**). If this is already in place, use this opportunity to review and strengthen your approach.

Embed social purpose in governance documents so it:

- Stays visible through leadership and strategy changes.
- Is reviewed regularly alongside other priorities.
- Anchors organizational direction and oversight.

Update governance documents to reflect this oversight role. This may include:

- Board or committee terms of reference.
- Governance manuals or charters.
- Corporate secretary job description.
- Annual work plans for the board or relevant committees.

Ensure these updates clearly signal that social purpose falls within the board's oversight responsibilities, alongside strategy, culture, risk and performance, as illustrated in the Purpose in Practice sidebar next page. Some organizations “mission lock” their purpose by embedding it in legal or constitutional documents (e.g., articles, bylaws or shareholder agreements) to help protect it over time.

Examples of Canadian companies that have formally embedded purpose oversight in their governance include TELUS, which assigns board-level responsibility for approving the company's social purpose and reviewing progress as part of strategic oversight, and Scotiabank, which embeds purpose oversight in its board mandate with committee monitoring of alignment, execution and disclosure. (For more Canadian examples, check out this report: [The State of Purpose Governance Among the TSX 60 \(2026\)](#)).

Equip the Board Effectively

Boards often need support to govern purpose well. Consider:

- Building the board's understanding of its role governing social purpose.
- Providing orientation or regular education on the organization's social purpose and why it matters.
- Clarifying how social purpose connects to strategy, culture, risk and long-term value creation.
- Defining what information the board will receive for oversight, and the reporting cadence.

The [Purpose Governance Toolkit](#) provides practical guidance to help boards strengthen purpose oversight. It includes a board diagnostic, a board–CEO conversation guide, and governance practices that help directors integrate purpose into strategy, capital allocation, CEO accountability, risk oversight and board evaluation.

As purpose governance is still an emerging area of governance practice, many boards benefit from additional guidance. See sidebar next page and the [State of Purpose Governance in Canada \(2024\)](#) report for further insight.

Board Oversight of the Social Purpose Implementation Plan

Board oversight is strongest when the Social Purpose Implementation Plan is brought to the board for approval and used as the basis for ongoing oversight. This allows the board to:

- Confirm priorities and sequencing.
- Monitor progress against agreed actions and milestones.
- Provide ongoing oversight as plans are refined or updated.

For more practical guidance on strengthening your board's oversight of purpose, see [Purpose Governance Guidelines for Boards](#).

Where Boards Often Need Support

Research shows that many boards would benefit from guidance on how to measure purpose impact, monitor integration and embed social purpose into decision-making, risk management and capital allocation.

Source: [State of Purpose Governance in Canada \(2024\)](#)

PURPOSE IN PRACTICE

BCLC – Embedding Purpose in Governance Roles

BCLC provides an example of how social purpose can be embedded across governance and leadership roles.

At BCLC:

CEO Terms of Reference indicates the CEO is responsible for “enacting BCLC’s social purpose”: [CEO Terms of Reference](#).

Chair Terms of Reference positions the chair as the guardian of purpose at the governance level: [Chair Terms of Reference](#).

Corporate Secretary Terms of Reference indicates the corporate secretary’s purpose responsibility is to embed purpose into governance processes – ensuring it is consistently reflected in board materials, discussion and oversight: [Corporate Secretary Terms of Reference](#).

Together, this approach shows how purpose can be integrated across roles:

- Governed by the board
- Executed by management
- Embedded in governance systems

Going Further: Structural Ways to Embed Purpose

Some organizations choose to reinforce their commitment to purpose through formal legal or ownership structures. Examples include:

- Embedding purpose language in governing documents (e.g., articles of incorporation or bylaws)
- Adopting public-benefit corporate forms where available (e.g., Benefit Company, Community Contribution Company, Community Interest Company or similar structures)
- Becoming a certified B Corp and aligning governance with its legal commitment requirements
- Exploring ownership models that align incentives with purpose, such as employee ownership trusts or worker cooperatives

The following resources provide practical guidance and examples to support purpose integration across your organization.

Resources

Tools and Guides

Additional [Social Purpose Roadmap](#) Examples

[Purpose Governance Guidelines for Boards](#)

[Purpose Governance Toolkit](#)

[State of Purpose Governance Among the TSX 60 \(2026\)](#)

[Social Purpose Steering Committee Guide](#)

[A Guide to Social Purpose Job Descriptions](#)

[A Guide to Executive Social Purpose Roles](#)

Video

[Bringing Social Purpose to the Heart of Your Business](#)

Tips for Success

- Establish board oversight early as the foundation for progress.
- Clarify executive and leadership accountability before launching detailed implementation actions.
- Start with a few achievable priorities that build momentum and confidence across the organization.
- Integrate purpose into existing roles and structures rather than creating parallel processes.
- Create and use the Social Purpose Implementation Plan to guide decisions, sequencing and board-level oversight.

Moving to Step 5: Embed

With leadership structures in place, governance oversight established and an implementation plan guiding the work, you're now ready to move to **Step: Embed**. This step focuses on integrating your social purpose into your organization's culture, strategy, decision-making, products, services and day-to-day operations so it becomes part of how your business works.

PHASE 2

Social Purpose Progress

Use the [Social Purpose Assessment Tool](#) to assess your current state. By completing **Step 4 (Plan)**, you've made measurable progress on:

Governance and Leadership (Practice 7): Purpose Governance

The board or highest governing body adopts, periodically reviews and oversees the organization's purpose; ensures it is embedded in strategy and culture; holds management accountable for delivering on it; oversees related disclosures; and reflects these responsibilities in its terms of reference.

Governance and Leadership (Practice 8): Purpose Leadership

Our board, leadership team, shareholders and/or owners actively support our purpose and regularly monitor progress on it.

Governance and Leadership (Practice 9): Executive Purpose Champions: Our company leaders visibly demonstrate support for our purpose, as champions, role models, mentors and coaches to others internally and externally.

Governance and Leadership (Practice 10): Cross-functional Purpose Collaboration: We have a cross-departmental team of senior leaders that meets regularly to ensure we are on track with our purpose goals (could be the executive).

Governance and Leadership (Practice 12): Purpose-based Planning and Budgeting: Purpose is embedded in business planning and budgeting processes, including templates and guidance, and is considered early, consistently and centrally in budgets, work plans and business development.

Download the full [Social Purpose Assessment Tool](#) to baseline your progress and set five-year ambitions.



COMMON BARRIERS TO EMBEDDING SOCIAL PURPOSE AND HOW TO ADDRESS THEM

Use the table below to identify common barriers you may encounter as you begin implementation and consider practical ways to address them. Select actions you can take immediately and others to incorporate into your Social Purpose Implementation Plan.

Barrier	How to Overcome
Lack of resources or competing short-term priorities	Resource purpose implementation (budget, capacity, data/analytics) so it competes fairly with short-term financial pressures; benchmark against peers to strengthen the business case; position purpose and purpose execution as a long-term value creation strategy.
Old mindsets/resistance to change	Build purpose capabilities (training, tools, decision frameworks) for leaders and managers so resistance is not just overwhelm or lack of know-how; understanding what peers and competitors are doing builds confidence and momentum.
Leadership and strategy transitions disrupt purpose	Have a Social Purpose Implementation Plan so the purpose continues through leadership transitions and strategy cycles.
Purpose treated as discretionary, not core	Embed purpose into formal governance (board charters, committee mandates, decision principles, risk and investment criteria) so it cannot be sidelined as discretionary.
Purpose overlooked in routine discussions	Make purpose a standing item on meeting agendas, including board and leadership meetings.
Misaligned incentives undermine purpose	Align performance targets, incentives and recognition with purpose behaviours.
Misaligned or unmotivated leaders block progress	Get the right people on the bus. Ask leaders whether they are motivated to see the purpose through; if not, they may choose to leave. When people are not aligned, they can unintentionally get in the way.
Lack of internal champions	Recruit and engage employees as champions and ambassadors for the purpose.
Inconsistent reinforcement at team level	Set the expectation that middle managers and supervisors raise the purpose in regular team meetings, communicate key actions and results, and reinforce it consistently in conversations with staff.
Purpose feels abstract or inauthentic	Share success stories from across the organization, including stories from the company's history; stories of impact, innovation, and new business or partnerships linked to the purpose can be motivating and make the purpose feel authentic and grounded in the organization's culture and values.

Embedding brings your social purpose to life across the organization. Through learning and engagement, alignment of culture and strategy, and integration into products and services, purpose becomes part of how your business operates.

Step 5: Embed

5.1 Educate and Engage Employees

Once your social purpose implementation plan is in place, start by educating and engaging employees. This step sets the foundation for everything that follows. For purpose to shape culture, decisions or systems, employees must understand it, see how it connects to the success of the business and recognize the role they can play in bringing it to life.

Educating employees goes beyond awareness. Ensure people understand why the company has adopted a social purpose, what it means in practice and how it relates to their day-to-day work. When employees see this connection, purpose becomes relevant rather than abstract.

To bring purpose to life wherein employees live it daily, establish an ongoing cadence of communications across all touchpoints:

- Office environment, memos, reports, email signatures, business cards and stationery
- Internal conversations, team meetings and all-hands updates
- Onboarding, performance reviews and recognition moments

Step 5 At a Glance

- Educate and engage employees.
- Embed social purpose in culture and decisions.
- Update vision and corporate strategy with social purpose goals.
- Embed social purpose in products and services.

Bringing Purpose to Life Through Video

A short social purpose video can make purpose tangible and motivating by connecting it to people, decisions and real-world impact.

Examples:

[Masonite](#)

[Web Express Printing & Mailing](#)



Integrating your purpose is about mobilizing and involving everyone, every time, everywhere in everything.



Make Purpose Noticeable and Actionable

Communications provide an important opportunity to express and reinforce your social purpose. Employees should be able to describe it clearly and explain how your products and services advance it. Use storytelling with real examples from across the organization to make connections visible. To achieve this, align executives and team leaders on the stories they'll share and the key messages they'll convey about the purpose – so their communications are consistent and therefore more effective.

Purpose implementation rarely succeeds without visible, sustained leadership from the CEO or business owner. Weak or inconsistent communication from senior leaders is one of the biggest barriers to activating purpose.

Employees take their cues from what leaders do – especially when under pressure, during trade-offs or in times of uncertainty. When leaders consistently apply purpose in decisions, priorities and behaviours, they signal that purpose is real and operational, not just rhetorical. When leaders articulate and role-model the mindsets and behaviours aligned with the company's purpose, managers and teams are more likely to integrate purpose into their own decisions and actions with greater confidence.

Engagement is equally important. Employees are not simply an audience for purpose communications – they are essential to activating it. Design engagement to be two-way and experiential, giving employees opportunities to explore purpose through conversation, learning and participation rather than one-way communication. Create opportunities for dialogue, learning and early contribution to build shared ownership and signal that social purpose is a collective direction, not a top-down initiative.

Rather than relying on charismatic leaders or one-off communications, make purpose a routine part of how work gets done. It is not the social purpose statement itself, but the ongoing process of nurturing dialogue around it, that keeps purpose front of mind and ensures employees use it as a guide for business decisions.

Coast Capital shows how this works in practice (see [Coast Capital Implementation Case Study](#)). Following the adoption of its social purpose:

- **Purpose launch events and conversations:** Coast Capital introduced its social purpose through a company-wide town hall, briefing employees on purpose, vision, mission and strategic direction.
- **Ongoing learning opportunities:** It offered a social purpose learning course for employees and hosted a regular lunch & learn series to explore different aspects of purpose.
- **Peer engagement and champions:** Strategy champions were recruited to lead purpose table talks across the organization, creating spaces for learning and dialogue.
- **Performance alignment:** Employees were asked to include purpose in their annual performance objectives, helping them understand how purpose shows up in their roles.
- **Values co-creation:** Employees participated in creating new organizational values that aligned with purpose, strengthening meaning and ownership.
- **Employee value proposition:** Coast Capital rebuilt its employee value proposition around the opportunity to work for a social purpose company, integrating purpose into recruitment, onboarding, job descriptions and the employee lifecycle.

These actions helped employees understand the purpose, connect it to their roles and begin contributing in meaningful ways. **Smaller organizations can apply these same principles using simpler approaches – such as owner-led conversations, team meetings or informal learning sessions – rather than formal programs.**

“When purpose is lived – not just stated, but lived – it changes everything. It inspires teams, builds trust, fosters innovation and creates momentum that extends beyond the organization.”

– MICHAEL MCCAIN, EXECUTIVE CHAIR AND FORMER CEO OF MAPLE LEAF FOODS

Practical Actions to Educate and Engage

- **Launch internally:** Host a company-wide town hall or all-hands meeting to connect purpose to business goals, vision and impact.
- **Onboard early:** Introduce purpose in job postings, interviews, orientation and new-hire materials.
- **Build learning:** Offer workshops, purpose courses, lunch-and-learns or peer-led table talks.
- **Recruit champions:** Identify and equip purpose ambassadors across teams to spark dialogue and ownership.
- **Enable contribution:** Invite ideas early through challenges, feedback forums or collaborative activities.
- **Align performance:** Include purpose in annual objectives, reviews and recognition.

Scale to Your Organization

Larger organizations may use formal programs like Coast Capital's approach described above. **Smaller organizations can achieve the same through owner-led conversations, regular team huddles or day-to-day reinforcement.**

Educating and engaging employees builds shared ownership. With this foundation, purpose becomes part of daily work and positions your organization to embed it deeply into culture, decisions and ways of working.



To connect employees' day-to-day work to your social purpose, see the [Connect Your Employees to Purpose](#) worksheet.



If your purpose is not translated into your values, it won't affect culture, and your purpose is unlikely to influence how people make decisions or behave.



PURPOSE IN PRACTICE

Unilever – Developing Personal Purpose

Unilever introduced “Discover Your Purpose” workshops for employees as part of its Future of Work program. These structured, facilitated sessions are designed to help employees identify their personal purpose and use it to guide their career choices and contributions at work.

The initiative has been scaled across the organization, reaching a large global workforce as part of a broader effort to align employee development with the company's purpose-led strategy.

In the workshops, employees:

- Reflect on formative life experiences and defining moments.
- Identify personal values, motivations and strengths.
- Explore the impact they want to have in the world.
- Articulate their personal purpose.
- Connect that purpose to their role, career and the company's purpose.

In one internal study, **92% of participants reported more inspiring jobs after attending.**

The result is not a change in roles, but a shift in how work is understood – turning everyday tasks into meaningful contributions.

5.2 Embed Social Purpose in Culture and Decisions

With employees educated and engaged, the next step is to embed social purpose into the culture and decision-making of the organization. Here, purpose shapes how work gets done, how priorities are set and how choices are made every day.

Link Purpose and Values

Your purpose defines *why* your business exists. Your values define *how* you behave in bringing your purpose to life – guiding decisions, actions and relationships. Values should be enduring and provide clear behavioural guidance across changing circumstances.

Embed purpose in your culture by reviewing and updating your company values so that one or more clearly reinforce a purpose mindset. Updating values alone does not change culture – alignment builds over time through consistent leadership behaviour, management practices and reinforcement in everyday decisions. In smaller organizations, this often happens informally through daily leadership actions and conversations; in larger organizations, this often requires leadership development, manager coaching and integration into performance management and training.

Not all values serve the same role. Many organizations list foundational expectations such as honesty, integrity and respect. While important, these are baseline behaviours expected in any organization and do not differentiate how your purpose shapes decisions. Purpose-led values instead describe what is distinctive about your organization – how you prioritize, act and make trade-offs in service of your purpose.

Begin by identifying the values and key behaviours that bring your purpose to life.

Ask:

- What values are needed for our company to fulfill its purpose?
- What behaviours reflect those values in action?
- What behaviours does our workforce need to demonstrate to advance our social purpose?
- How should people act when navigating trade-offs or ambiguity?
- How should our social purpose guide the way we engage with customers, communities, partners and other external interest groups?
- What values do we celebrate and why?

From these behaviours, distill one or more values that define your purpose-forward culture. Consult employees to build buy-in, gather insights and generate momentum for your new or refreshed values.

When leadership modelling and shared values reinforce each other, purpose becomes the lens for decision-making – turning belief into daily practice.

See page 67 for examples of values from companies that have adopted a social purpose.

TRY THIS

Discover Your Own Purpose

AppreciatingPurposeAI, developed by 1-DEGREE/Shift, is a quick, easy and engaging tool you can try for yourself. It uses guided questions to help you reflect on what motivates you and the impact you want to have – at work and in your life.

Broaden to External Relationships

Many organizations focus their values mainly on internal relationships – how employees work together – while overlooking those that shape external interactions. Social purpose companies go further by defining how they engage externally with customers, communities, suppliers and partners.

When updating your values, ensure they reflect how your purpose is expressed both inside and outside the organization.

Measure Purpose Through Employee Experience

Culture is reflected not only in stated values but also in how employees experience and perceive purpose over time. Purpose perception questions are especially important for identifying gaps between stated purpose and everyday decisions, where misalignment can quickly undermine credibility and trust.

To understand whether social purpose is truly embedded, include purpose-specific questions in your organization's employee engagement surveys.

Include questions such as:

- Would I recommend this company as a place to work because of its purpose?
- Do I feel equipped and empowered to contribute to our social purpose?
- Do senior leaders consistently model the company's purpose?
- Do I personally feel aligned with the company's purpose?
- Do I feel the company is living up to its purpose?

Including purpose-focused items alongside traditional engagement measures reveals whether purpose is becoming a lived part of the organization's culture – not just something communicated from the top.

For more sample questions and approaches, refer to the [Purpose Perception Survey](#) resource.

Redesigning Jobs for Purpose

One way to bring social purpose to life is to redesign everyday roles so they contribute more directly to societal impact. Often called job purposing, this approach involves adjusting how work is done – without changing job titles or structures.

Job purposing expands the societal impact of roles by reshaping job tasks: deepening what matters most, adding new elements or replacing activities with more purpose-driving alternatives. Research shows that purpose is a powerful driver of engagement and productivity – often more motivating than pay alone.

This is a practical exercise in which employees endeavour to “purpose” their job by deepening it, adding to it, taking something away or replacing some aspect of the job with something else. The intent is to design ways to affect societal impact within specific workplace tasks, ideally tasks that are core to the job.

Convene a team meeting of employees with similar job functions. Follow these steps:

- Identify the task(s) most core to the job.
- Discuss how the societal impact of this task could be expanded.
- Consider what could be added, removed, replaced or deepened.
- Identify potential actions and agree on pilots to test them.
- After the pilot phase, update job descriptions to reflect any changes.

For more information, visit [Do Good at Work: How Simple Acts of Social Purpose Drive Success and Wellbeing](#).

EXAMPLES OF VALUES THAT REFLECT SOCIAL PURPOSE

Social Purpose	Values
 Working together for a better financial future. Source	Respect: We harness the power of inclusion and opportunity in our business, trust those we work with, and value everyone's contribution Integrity: We operate with honesty, courage, transparency and fairness in all we do Service: We act with empathy and humility, putting the people and businesses we serve at the centre of what we do Excellence: We set high standards for what we do, championing innovation and using our energy, expertise and resources to make a positive difference Stewardship: We are passionate about leaving things better than we found them
 We exist to generate win-wins for the greater good. Source	Integrity I TAKE RESPONSIBILITY for my impact – even when it's hard. I BUILD TRUST by being honest and consistent in what I say and do. Curiosity I ASK QUESTIONS that deepen my understanding and room for impact. I actively SEEK GROWTH through new insights, experiences and connections. Human Connection I COLLABORATE across teams and communities, so together we win. I ENCOURAGE others by showing POSITIVITY and FOCUS, even under pressure.
 To blend care and creativity to nourish the world. Source	Make the future better: We are optimistic and courageous while making choices in pursuit of our dreams. Sustainability informs our curiosity, imagination, and innovation. We are passionate about leaving our planet a better place for future generations. We believe the best is yet to come. Work together globally: We recognize our diversity creates a unique strength, and we learn from our colleagues and partners globally. By collaborating, communicating, sharing, and learning, we create better together. Act like family: We are a caring family company where everyone has the opportunity to grow, follow their own personal "Purpose" and find fulfillment in their work. We support each other and demonstrate mutual respect. We nourish people's well-being – physical, mental, and financial. Behave like owners: We are passionate about creating long-term value. We believe that we are part of something bigger than ourselves and strive to make a difference. We trust each other and treat talent as a valuable resource. We believe in strategic risk-taking and in doing the right thing, especially when it is hard to do. Build customer success: Recognizing that our success depends on our customers' success, we work to create value and ensure success by understanding, anticipating and prioritizing customer needs. We build a mutual commitment to derive sustainable long-term value. Deliver results: We take personal responsibility for meeting our commitments. We are focused on achieving objectives aligned to our triple bottom line of people, planet, and performance. We execute with excellence, measure results, and reward success.

Embed Purpose in the Employee Lifecycle

Purpose becomes real when it is woven throughout the employee journey – from recruitment to recognition. Use this [Employee Social Purpose Lifecycle Tool](#) to identify opportunities to integrate purpose into:

- **Recruitment and onboarding:** Incorporate purpose into job postings, interviews and orientation; screen for values alignment and refresh onboarding to build early connection.
- **Performance management:** Include purpose-linked goals in objectives, reviews and career development plans.
- **Development and training:** Provide purpose-specific learning and skill-building opportunities through formal training, mentoring and competency models.
- **Recognition and rewards:** Celebrate purpose contributions via peer recognition, incentives and promotions.

This lifecycle approach ensures purpose shapes every employee touchpoint, creating consistent lived experience.

Given how fundamental these elements are for embedding social purpose within an organization and achieving meaningful impact, team leaders can use the [Social Purpose Performance Management Guide](#). It provides examples on how to create performance goals that embed purpose into decision-making, employee engagement and team roles.

Physical Space Refresh

How purpose shows up in workplaces, on vehicles, through signage and in other everyday visual cues sends a clear signal about what matters and helps build a visible purpose culture. The examples below and on the next page illustrate different ways organizations make social purpose visible and tangible across their physical environments.

Illustrative examples shown:

Front-of-house and internal workplace environments from Web Express Printing & Mailing, Pro-Claim Group (PPCR), Return-It and Armour Valve, together with purpose displayed on a PPCR company vehicle.



Incorporating Your Purpose in Job Postings Attracts Candidates Who Share Your Values

Including purpose in job postings signals to candidates what the organization stands for and what it means to work there – beyond the role itself – and amplifies the company's social purpose brand in the marketplace.

BCLC includes its purpose within its job postings, as illustrated below:

“BCLC exists to generate win-wins for the greater good.

For our people, our players, our communities, our industry, and our planet.

Being a social purpose company, we are not only able to better align our business decisions with our purpose, but more importantly, we are committing to doing our part in creating a better world.

We bring our purpose to life by ensuring all our actions, behaviours and decisions create benefits for communities and the planet.

Motivated and guided by our social purpose, everything we do must benefit the greater good. And we encourage our employees, partners, players, industry and communities to engage with us on this ambition.”

“We use a multi-tiered communications approach and market our purpose internally as well. We have it up on the walls. Part of our success with purpose is that we market it as hard to employees as we do to external clients.”

– TREVOR BURNS, MARKETING DIRECTOR,
PRO-CLAIM GROUP



Embed Purpose Into Decisions

As culture takes shape, social purpose must be embedded into how decisions are made. This includes strategic, operational and day-to-day choices – especially where trade-offs arise. Without a practical way to apply purpose, decisions default to habit, urgency or short-term pressures.

Managers and business owners play a critical role here. They translate purpose into real choices – guiding teams to decide what to focus on, what to pause and what to rethink. To do this well, they need simple, usable tools that support judgment rather than add bureaucracy.

One effective approach is a [Social Purpose Decision Lens](#).

A decision lens is both a **mindset and a practical tool**. It enables teams to quickly determine whether decisions:

- Advance the organization's social purpose.
- Are neutral with respect to purpose.
- Detract from purpose and require reconsideration, mitigation or redesign.

In practice, purpose-guided decisions often start with a few simple questions:

- Is this aligned with our social purpose?
- Does this meaningfully advance why we exist as a business?
- Is this the most effective way to deliver on our purpose, given our size and capacity?
- How could this be adjusted to better support our purpose?

A well-designed **Social Purpose Decision Lens** becomes a shared point of reference across the organization. It clarifies what drives the business, allowing people in different roles to ask, “What does this mean for me?” rather than waiting to be told what to do. This clarity supports faster decision-making, greater autonomy, and increased agility, while keeping decisions aligned with the organization's social purpose.

Once established, the Social Purpose Decision Lens can be built into practical screens and criteria used in product development, client selection, procurement, budgeting and investment decisions.

Organizations need to be willing to revisit decisions, practices and activities that no longer align with their social purpose, including stepping away from those that clearly undermine it. When purpose is consistently sidelined in decision-making, it quickly loses credibility and risks becoming hollow. Using purpose as a decision lens helps guard against this risk by making purpose a practical reference point in real choices – not just something stated in principle. Without this discipline, organizations can fall into **purpose-washing**, where a social purpose is articulated but not consistently reflected in everyday decisions and behaviours. Applying a Social Purpose Decision Lens is therefore a critical early step in preventing purpose-washing and building trust, internally and externally.

For small businesses, this may simply be a short discussion during a team meeting or owner check-in. For larger organizations, it may be built into planning, approvals or investment reviews. What matters is not the formality of the process but using purpose consistently to guide choices.



To help leaders and teams apply this approach in real decisions, use the [Apply a Purpose Decision Lens](#) worksheet.

Use Purpose to Filter the Noise

Social purpose can act as a **decision filter**.

Test new interest-group expectations or emerging issues against your core purpose: **Does this align with why we exist and what we can deliver over the long term?**

If yes, take it on deliberately. If not, don't absorb it as a responsibility.

Why this matters: Without a purpose filter, organizations risk reacting to every pressure – diluting focus and credibility.

What a Social Purpose Decision Lens Looks Like in Practice

The examples below show how a Social Purpose Decision Lens can guide both **innovation** (creating new, purpose-advancing products) and **exit** (stopping activities that no longer fit your purpose) in organizations.

Clarify Roles and Responsibilities Across the Organization

Clear roles and responsibilities are essential to embedding social purpose into culture and decision-making. Purpose execution falters when organizations treat it as everyone's responsibility but fail to embed it in roles or structures.

Assess how social purpose is reflected across departments – or, in smaller organizations, across core functions and roles – such as strategy, finance, operations and people practices. Clarifying responsibilities ensures purpose is integrated into planning, performance objectives and accountability mechanisms across the business, rather than residing in a single function or initiative.

Use this [Social Purpose Departments Checklist](#) to map how each department contributes to your company's purpose and where further integration may be needed.

PURPOSE CHALLENGE

CVS Chose Purpose Over Sales and Bounced Back

Sometimes social purpose companies accept short-term profit impacts when transitioning to more purposeful products and services. CVS is a well-known example.

In 2014, CVS became the first major U.S. pharmacy chain to stop selling cigarettes and other tobacco products because this conflicted with its purpose of helping people on their path to better health. It made this decision knowing it was walking away from an estimated \$2 billion in annual tobacco-related revenue.

Subsequent research showed that in states where CVS had a significant market share, cigarette pack sales fell faster than in states without CVS stores, and purchases of nicotine patches increased, indicating more quit attempts. This demonstrated that the decision had a real public health impact by reducing access to cigarettes and supporting customers' efforts to quit.

CVS showed that this purpose-led choice was financially sustainable. Following the removal of tobacco, total company revenue increased, supported by growth in its pharmacy and health businesses, even though front-of-store sales initially declined.

PURPOSE IN PRACTICE

Coast Capital Used a Social Purpose Decision Lens to Drive Innovation

Coast Capital used its Social Purpose Decision Lens to review a new chequing account it was about to launch. The team realized the product would be purpose-neutral, which sparked an internal conversation about how it could be changed – could the company renegotiate or redesign features to better advance its purpose of helping people and businesses grow their incomes? Guided by these questions, it redesigned the offer and created the **Elevate Chequing Account**, combining everyday banking with free access to thousands of online courses and professional certificates via a learning platform called Coursera. This innovation aligned the product with its purpose by helping its members (customers) build skills and increase their earning potential.

PURPOSE IN PRACTICE

Barclays Used Its Purpose to Stop Misaligned Activity

Barclays Bank in the UK used its purpose to justify closing its tax reduction department. The bank decided it would no longer engage in transactions where the main objective was tax avoidance, even though these activities were legal, because they conflicted with its purpose of **"Creating Opportunities to Rise."** This is an example of a Social Purpose Decision Lens leading to a deliberate choice to stop work that is inconsistent with the organization's purpose.

[Source](#)

PURPOSE IN PRACTICE**Armour Valve – Aligning Employee Performance With Social Purpose**

Armour Valve, a family-owned small business supplying specialty industrial valves and equipment, provides an example of how purpose can be embedded across all functional areas of an organization. The table below outlines actions taken and planned to align operations with its purpose goals.

Functional Area	Implemented (2023-2025)	Planned (2026-2030)
HR	Purpose embedded in job descriptions, interviews, employee survey and performance reviews. Sustainability & Purpose 101 training modules created.	Provide net-zero homes training; introduce an EV stipend for employees by 2030.
Sales and Marketing	Sustainable promotional items introduced; employees trained on selling with purpose; digital product catalogue generator implemented. Sustainable procurement adopted as standard.	Measure purpose engagement in customer and supplier satisfaction surveys.
Operations	LED lighting installed; sustainable packaging incorporated; electric forklift and pump truck acquired; consolidated shipments implemented to reduce emissions. Hybrid vehicle acquired. Scope 3 logistics measurement revised and baseline year reset to 2024.	Conduct an energy audit. Install occupancy sensors, smart thermostats and HVAC upgrades. Introduce lifecycle assessments (LCA life) for key products or services.
Service	Remote training for customer maintenance personnel implemented. Repair vs. replace calculator tool launched to encourage clients to choose repair.	Transition service vehicles to hybrid/ electric at end-of-life.
General Administration	Hybrid work implemented; sugar sheet paper adopted; purpose integrated into business forms and collateral. Purpose added to management meeting agendas.	Expand purpose to all meeting agendas.
Senior Management	Purpose strategy and governance model adopted; became signatories to Net-Zero Challenge and A Call to Purpose. Family Business Sustainability Pledge signed; purpose KPIs developed for management review. Expanded reporting to include non-purpose sustainability goals.	Introduce purpose KPIs for management.



Purpose Moment Tip: Reserve two minutes at the start of every meeting for someone to share how their work advanced the company's purpose since the last meeting.



Reinforce and Monitor

Embedding social purpose into culture and decisions requires ongoing reinforcement – not a one-time push. Employees watch closely to see whether leaders live purpose during tough trade-offs.

Leadership example sets the tone: Purpose is reinforced when senior leaders or business owners visibly model it in their own decisions and communications.

In all-hands meetings or regular updates share:

- Why the purpose personally matters to them.
- How they use purpose to guide decisions.
- How the business contributes to positive societal outcomes.

Personal stories help normalize conversations about purpose and build connection.

Managers translate purpose into daily work: Team leaders often play the most influential role in helping employees see how purpose applies to their roles. Support managers to make these connections – this is often more effective than top-down messaging. Support managers by:

- Providing simple talking points or prompts managers can adapt.
- Creating regular opportunities for managers to reflect together on how purpose is showing up in their teams and to identify and address any barriers or actions that are counter to the purpose.
- Recognizing leaders who actively bring purpose into day-to-day work.



Use the [Connect Personal and Company Purpose](#) worksheet to facilitate short team conversations linking personal purpose to company purpose.

Feedback and reflection sustain momentum: Use light-touch feedback mechanisms to understand whether purpose is showing up in decisions and behaviours. This may include pulse surveys, decision reflections or informal reviews that ask questions such as: Is purpose influencing how we make choices?

For small businesses, this may be as simple as incorporating purpose into weekly team check-ins or monthly owner conversations.

Leadership example, manager translation and regular feedback create reinforcing loops that embed purpose into everyday behaviours, decisions and structures.

This ongoing attention reveals gaps, confirms progress and ensures purpose remains a practical guide – even as people, priorities and conditions change.

Celebrate Progress

Purpose doesn't arrive fully formed. It shows up in moments, experiments, conversations and small wins. If you don't notice these moments, they disappear – and so does momentum.

Celebrating progress is not a “nice to have.” It's how people know their efforts matter.

Celebrate when:

- A team makes a decision differently because of purpose.
- A product or process shifts in a more purpose-aligned direction.
- Someone speaks up, tries something new or challenges the status quo.
- A collaboration sparks learning – even if it's messy or incomplete.

Keep it human. Keep it visible. Keep it fun.

Celebration doesn't need a stage or a budget. Celebrate through:

- A shout-out in a team meeting.
- A short story in an all-hands update.
- A Slack post, email or bulletin board moment.
- A handwritten note, shared laugh or “that was a good call” acknowledgment.

Importantly, celebrate **learning**, not just success. Purpose work involves trade-offs and course corrections. Naming what didn't work – and what you learned – builds trust and credibility. Over time, capture these moments in a shared story archive or vault so people can see how purpose shows up across the organization.

These small celebrations do something powerful: they signal what your organization truly values. They tell people, *this is who we are becoming*.

When purpose is noticed, it's repeated. When it's celebrated, it sticks.

4.3 Update Vision and Corporate Strategy With Social Purpose Goals

This task translates your social purpose into organizational direction. It ensures your organization's North Star – its social purpose – actively guides strategy, goals, budgeting and performance systems. By updating your vision and corporate strategy with social purpose goals, you move from defining why you exist to determining how you will create lasting value for society and your interest groups.

A clearly articulated purpose is the foundation of a purpose-led company. To bring it to life, your purpose must inform your vision and flow through your corporate strategy or business plan, shaping priorities, investments, resource allocation and budgeting decisions.

Purpose defines why your business exists and the societal contribution it seeks to make. Vision describes the better future you're working toward if that purpose is fulfilled. Strategy outlines the priorities that will move your organization toward your vision. Mission describes what your organization does each day to advance that purpose. Purpose endures, vision inspires, strategy evolves as conditions change and mission guides daily actions.

Use Your Purpose to Set or Refine Your Vision

Begin by ensuring your organization has a clear, up-to-date vision that reflects its social purpose. A strong vision articulates the ideal future state your company is working toward – often five to 10 years ahead – and makes clear how your business intends to advance its purpose.

Reflection Prompts: Reviewing Your Vision

- What does success look like if we fully realize our purpose?
- How is the world made better by our work?
- How will we know we're making progress toward our purpose?
- What bold future state could inspire our teams and external interest groups and partners?

Engage key interest groups early to co-create or refine your vision. These include employees, customers, partners, community representatives or others who are affected by or connected to your purpose. Prioritize engagement with those most relevant to your purpose and scale the process to fit your organization's size and capacity.

HOW PURPOSE, VISION, STRATEGY AND MISSION WORK TOGETHER

Concept	Core Question	Time Horizon	Example
Purpose	Why do we exist – what societal need do we serve?	Enduring	"To advance clean energy access"
Vision	What does success look like if we fulfill our purpose?	Five to 10 years	"A world powered by affordable renewable energy"
Strategy	What priorities and actions will move us toward our vision?	One to five years	"Invest in local renewable capacity; build community partnerships"
Mission	What do we do every day to deliver on our purpose?	Ongoing	"Deliver renewable energy solutions to communities"

FIGURE 21: THE ROLES OF PURPOSE, VISION, STRATEGY AND MISSION

PURPOSE IN PRACTICE

BCLC – Refreshing Vision to Advance Social Purpose

After adopting its social purpose (“to generate win-wins for the greater good”), BCLC refreshed its vision to advance on its purpose and guide its corporate strategy.



Clarify How Your Purpose Creates Change

Once your vision is clear, the next step is to articulate how your organization believes it can contribute to that future. This is where a purpose theory of change can be helpful.

A purpose theory of change describes how your organization's core activities, products and decisions are expected to lead to specific outcomes and to the societal impact your purpose seeks to achieve.

In practical terms, it describes:

- What you invest (inputs).
- What you do (activities).
- What you produce (outputs).
- What changes as a result (outcomes).
- The broader difference you seek to make (impact).

It makes explicit the pathways that connect what your organization does every day to the societal contribution your purpose intends to achieve. (See pages 42–43 for guidance and examples.)

Use this process to:

- Clarify how your purpose works in practice.
- Test assumptions about how change occurs.
- Strengthen the evidence behind your purpose.
- Link strategy, operations and impact.
- Identify where your competencies uniquely position you to contribute.

Not all organizations need a formal theory of change. **For small teams, ask: “How do our daily products and services create change?”**

For larger organizations, the theory of change may be documented more formally as a flowchart, diagram or narrative. It can also be included in supporting materials that explain how the organization will advance its purpose.

In many cases, elements of this thinking may already exist in your **purpose narrative** developed earlier. Revisiting it during the Embed phase helps refine and validate your assumptions as you build a strategy to deliver on your purpose.

See the Armour Valve example on the next page for a purpose theory of change in practice.

Define Your Purpose Priorities

Given the future you want to achieve (your vision) and how you believe change occurs (your theory of change, if you create one), the next step is to determine where to focus.

Purpose priorities guide your strategy by concentrating effort on the areas where your business is best positioned to contribute to meaningful impact.

Defining priorities typically involves research and reflection to better understand:

- The societal challenges, problems or opportunities your purpose seeks to address.
- The evidence supporting your chosen contribution.

- Where your company is already creating impact.
- Where future effort and investment could have the greatest effect.

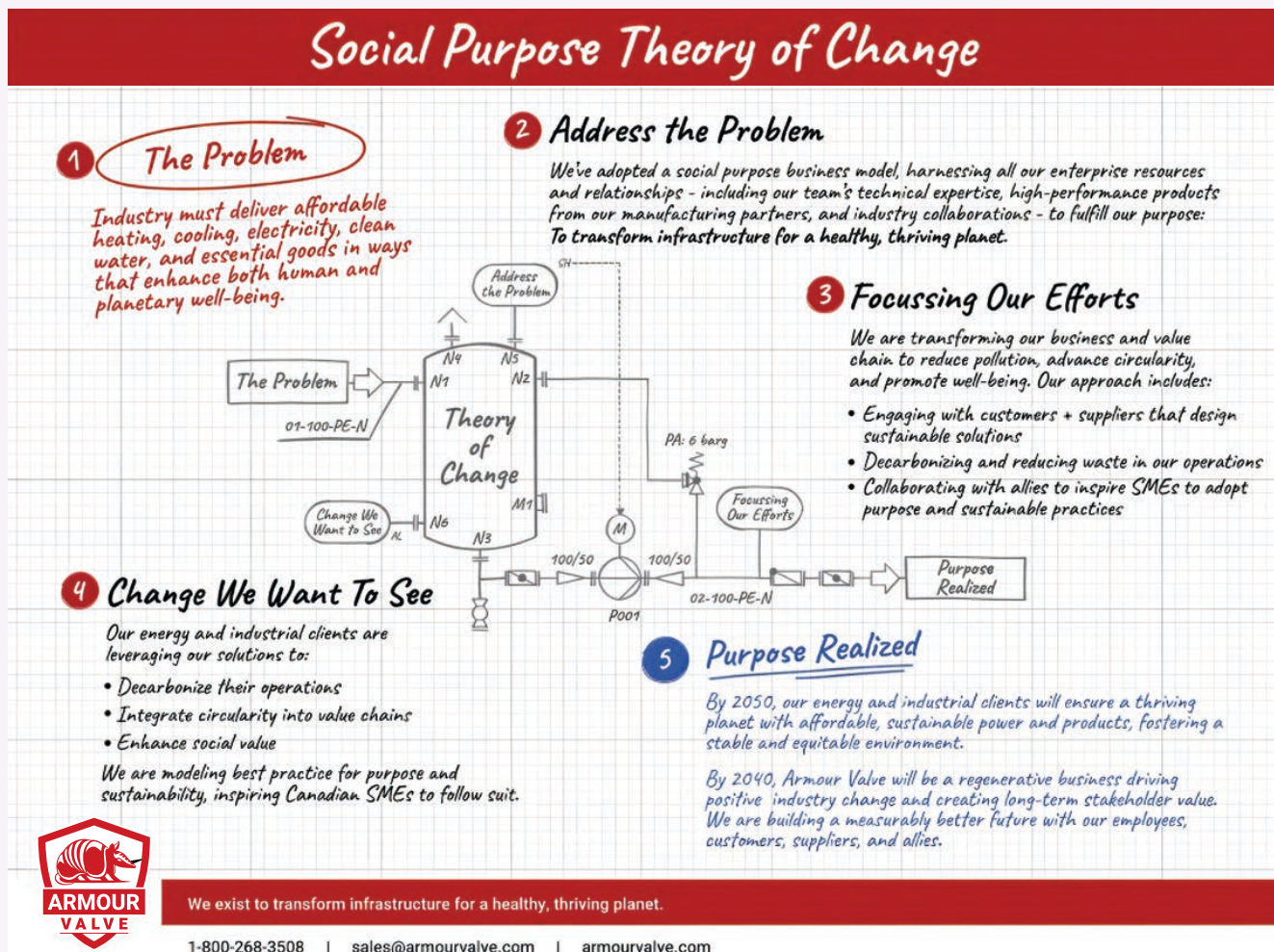
Organizations that developed a “purpose narrative” in Phase 1 can draw on that work to inform this exercise. Conduct a brief current state assessment to see where you’re already contributing to your purpose.

Aim for around three to five purpose priorities to focus energy and resources effectively. **Smaller organizations may choose fewer priorities to maintain clarity and capacity.**

PURPOSE IN PRACTICE

Armour Valve – Developing a Purpose Theory of Change

The example below shows how **Armour Valve**, a family-owned industrial company, connects its social purpose to business outcomes through a simple theory of change, illustrating how core operations contribute to system-level impact.



Turn Purpose Priorities Into Goal Statements

Once your purpose priorities are defined, translate them into **long-term purpose goals**. These goals describe what success looks like as you advance on your vision, and provide a basis for planning, measurement and learning.

Typically, long-term goals align with your vision horizon – often 10 years – and are then broken down through back-casting into:

- Medium-term goals (e.g., three to five years).
- Shorter-term goals and annual targets (suitable for an annual business plan).

Set goals that stretch your organization while remaining achievable. Wherever possible, they should be quantifiable and measurable, but qualitative goals are also appropriate when progress can be assessed in meaningful ways.

Some organizations hesitate to set social purpose impact goals because achieving them often depends on factors beyond their direct control. This is a common and valid concern. Many social purpose outcomes require collaboration with others. While these outcomes cannot be fully controlled, setting impact goals provides direction, accountability and a shared basis for learning and adaptation. It also helps identify where collaboration with others will be essential to achieving the broader societal outcomes your purpose seeks to create – a topic explored in Step 6: Collaborate.

If you have developed a purpose theory of change, it can help identify these dependencies, clarify the contribution your organization can reasonably be accountable for and reveal where collaboration with others will be essential to achieving your long-term impact goals.

SETTING PURPOSE GOALS

- ☐ Include at least one goal that every employee can connect to.
- ☐ Ensure one goal relates to your core products or customers.
- ☐ Add at least one goal requiring collaboration with external interest groups.
- ☐ Balance ambition with realism – combine measurable (quantitative) and qualitative goals.

Use these prompts during your strategy development or goal-setting workshop to ensure breadth across internal, external and system-level objectives.

As you translate purpose priorities into goals, it is helpful to distinguish between – and include – two types of goals:

1. **Impact goals**, which describe the societal or system-level outcomes you are seeking to contribute to through your purpose.
2. **Process or integration goals**, which describe how your organization will embed its purpose into its operations – and are investments in your future impact.

Impact goals are unique to each organization's purpose. Process goals, however, can often be shared or applied across many organizations.

Here are examples of process goals:

- Percentage of product or service portfolio aligned to our purpose
- Percentage of strategic initiatives that explicitly advance our purpose
- Number of new products, services or features designed with explicit purpose objectives
- Percentage of customers who engage with or choose the organization because of its purpose
- Percentage of staff or customers who believe the company is living its purpose
- Percentage of employees who have received training on the purpose and their role in delivering it
- Number of partnerships or collaborations explicitly designed to advance the purpose
- Percentage of revenue generated from purpose-aligned products or services

When selecting process metrics, to avoid siloed planning, consider including some that span multiple functions and require cross-departmental collaboration. Metrics should be manageable in number and include both **leading indicators** (predictive of future performance) and **lagging indicators** (reflecting past results).

For illustrative examples of social purpose impact goals, see [Social Purpose Impact Goals](#).

For examples of process and integration goals, see [Social Purpose Process Metrics](#).

Setting Ambitious Goals

Research on goal setting consistently shows that people achieve more when goals are ambitious but achievable. Setting the bar high – while still feeling possible – can help build momentum, sustain motivation and reinforce commitment. It is better to set meaningful goals and improve through learning than to avoid goal setting altogether for fear of not having “perfect” results.

Build a Purpose Measurement Framework

From your goals, you can develop a **purpose measurement framework** (at right) that links your purpose, vision and goals across different time horizons. This framework tracks performance, informs decision-making and supports ongoing learning. **In small organizations, this framework may be a simple set of agreed goals and indicators reviewed regularly, rather than a formal system.**

Purpose measurement frameworks evolve. As strategies are implemented and insights are gained, goals and metrics can be refined to reflect changing conditions and deeper understanding. Start simple. Choose three to five indicators that reflect your highest priorities and refine them as you learn.



FIGURE 22: PURPOSE MEASUREMENT FRAMEWORK

PURPOSE MEASUREMENT FRAMEWORK EXAMPLE

Time Horizon	Goal Type	Example Measure	Review Cycle	Checklist Item
Long term (10 years)	Impact	Societal outcome indicator (e.g., reduced emissions, improved community well-being)	Annual	Requires collaboration with external interest groups
Medium term (3-5 years)	Process	% of products aligned with purpose	Annual	Relates to your core products or customers
Short term (1 year)	Process	Employee engagement in purpose programs	Quarterly	Connects to every employee

FIGURE 23: ILLUSTRATIVE PURPOSE MEASUREMENT FRAMEWORK

Recalibrate Your Scorecard or Dashboard to Reflect Your Purpose

Review your existing scorecard or dashboard – it likely already tracks growth, market share, efficiency, customer experience and employee engagement. Add your social purpose goals and targets so they are managed alongside conventional business metrics.

Embedding purpose into your scorecard makes it clear that purpose is part of performance, not separate from it. Include purpose indicators beside financial and operational indicators to guide decisions, track progress and reinforce accountability across the organization.

When you update your scorecard, reflect both impact and process goals; for example, societal outcomes alongside indicators of how purpose is embedded in products, culture and operations.

Start small. Select a few high-quality indicators that align with your purpose priorities and expand or refine them as your strategy and measurement capabilities mature.

Resource Your Purpose

When setting up budgets and capital plans, ensure you allocate resources to support your purpose-related investments and initiatives. Your purpose should also be reflected in any merger and acquisition plans and major transformation initiatives.

SMALL BUSINESS MICRO-FRAMEWORK EXAMPLE

Metric	Target	Owner	Check Monthly
Purpose-aligned sales	20% of revenue	Owner	☐
Community partnerships	One active	Sales Lead	☐
Employee purpose ideas	One per quarter	All	☐

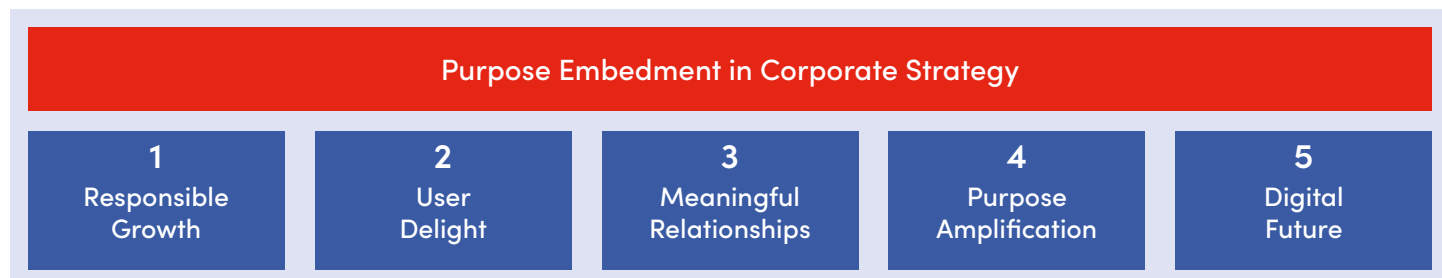
Small Business Scorecard

Add one purpose metric to your existing monthly report. Example: “% of sales from purpose-aligned products.” Track alongside revenue/profit.

Illustrative Example: Purpose Embedded in Overall Corporate Strategy

In the example below, purpose is embedded explicitly in the fourth strategic pillar: *Purpose Amplification*. The other strategic pillars can also be supported by initiatives that advance societal impact.

With purpose now guiding your vision, strategy, scorecard, budget, culture and decisions, your organization will operate as a unified purpose-led enterprise.



PURPOSE CHALLENGE

Turning your purpose into business objectives, goals and targets is a major drop-off point for many companies but is essential. Many companies struggle at this point, yet once your purpose starts driving everyday decisions, the payoff is significant: alignment, motivation and long-term impact.



PURPOSE IN PRACTICE**Armour Valve – Integrating Purpose Into the Corporate Scorecard**

Armour Valve’s social purpose is to *transform infrastructure for a healthy, thriving planet*. To operationalize this commitment, the company has integrated purpose-related goals and targets directly into its corporate scorecard alongside financial and operational metrics. The scorecard is also used to inform incentive KPIs for the senior management team.

KPI Category	Metric	2026 Target	Weight (%)	Score (1–5)
Profitability	Net profit margin vs. budget	Confidential	Required	Pass/Fail
Revenue Growth	~2x 2023 (\$15M)	Confidential	20%	1–5
Purpose-Aligned Revenue	% of revenue aligned with purpose	50%	20%	1–5
GHG Emissions Reduction	% reduction in Scopes 1, 2 and 3 vs. 2022 baseline	>35%	15%	1–5
Stakeholder Satisfaction	Customer satisfaction score	≥90% annually	10%	1–5
NPS	Net Promoter Score (customers, employees, suppliers)	≥8	10%	1–5
Employee Engagement	% of employees fully engaged with purpose	≥70%	10%	1–5
Retention	Employee retention rate	≥90%	10%	1–5
Industry Influence and Advocacy	Speaking engagements and media mentions	Ongoing	5%	1–5
Governance and Culture	Purpose embedded in processes and decision-making	Implement	Required	Pass/Fail

PURPOSE IN PRACTICE

Novo Nordisk – Iterating Strategy as Purpose Evolved

Novo Nordisk is a global healthcare company founded in 1923 and headquartered in Denmark. It is a publicly traded pharmaceutical company known for its insulin products for Type 2 diabetes and employs approximately 64,000 people worldwide. This example shows how Novo Nordisk adjusted its strategy as it redefined its purpose over time, informed by what it learned about diabetes, access to treatment and prevention.



Purpose and Strategy 1:

Selling insulin (early commodity focus)

At an early stage, Novo Nordisk's purpose and strategy were focused on selling insulin. The company's role was defined by producing and supplying a treatment for diabetes.

Purpose and Strategy 2:

Expanding access to insulin (subsidies for low-income markets)

Novo Nordisk identified that approximately two-thirds of people living with diabetes were in countries that could not afford insulin. In response, the company adjusted its approach: continuing to sell insulin in countries that could afford it, while using some of those profits to subsidize access in countries that could not.

Purpose and Strategy 3:

Treating diabetes (holistic treatment)

The company then broadened its focus from a single product to diabetes treatment more generally. Insulin became one option among others. This shift led Novo Nordisk to work more closely with doctors and hospitals to support a wider range of diabetes treatments.

Purpose and Strategy 4:

Preventing diabetes (prevention)

Novo Nordisk later shifted its focus again, from treating diabetes to preventing it. This resulted in partnerships with NGOs and communities and a \$20 million donation to the University of Toronto to support research on diabetes and chronic disease prevention. During this stage, the company also launched Cities Changing Diabetes, in collaboration with the Steno Diabetes Center in Copenhagen, University College London and an initial group of five cities. The initiative supported cities with tools and discussions to design diabetes prevention strategies.

Purpose and Strategy 5:

Addressing chronic disease more broadly (systems-level prevention)

Building on its diabetes prevention work, Novo Nordisk broadened its approach to address chronic disease more generally, including obesity and heart disease. Through initiatives such as Cities for Better Health, the company extended its city-based prevention approach beyond a single disease, working with cities and partners to support population-level health outcomes.

Together, these stages show how a company revised its purpose in steps and made corresponding strategic choices at each stage. Rather than holding a single, fixed definition of its role, Novo Nordisk adjusted its strategy as its understanding of the problem and its potential contribution changed.

Aligning CSR, Sustainability, ESG and Community Investment With Your Social Purpose

Many organizations already have corporate social responsibility (CSR), sustainability, environmental, social and governance (ESG) or community investment strategies in place before they adopt a social purpose. These efforts represent meaningful commitments and long-standing relationships. However, they are **not the same as social purpose**.

Your social purpose defines **why your organization exists**, while CSR, sustainability and ESG help your organization **manage its social and environmental impacts, risks and responsibilities**. Community investment programs **direct resources, such as funding and employee volunteering, to community priorities**. While closely related, they serve different roles and must be intentionally aligned to your purpose.

A common challenge is assuming that existing CSR, sustainability, ESG or community investment priorities can simply become a company's purpose goals. Experience shows this can dilute strategic focus and create confusion about what the organization is ultimately trying to achieve. Social purpose companies avoid this by ensuring that CSR, sustainability, ESG and community investment strategies and programs **link to, reflect and advance** their purpose – rather than define it. For example, a bank's existing ESG focus on reducing emissions could connect to – but not substitute for – a broader purpose to advance community resilience.

IKEA provides an example of how social and environmental commitments can be connected to a company's purpose: "Our purpose is to create a better everyday life for the many people. And to do so in a way that is affordable, sustainable and respects human rights." (*emphasis added*)

Common Approaches to Alignment

Organizations take different approaches depending on their size, structure and maturity. Common approaches include:

- **Focusing CSR, sustainability, ESG and community investment** on purpose priorities to increase impact and coherence.
- **Re-mandating existing CSR, sustainability, ESG and community investment roles** to also support purpose implementation.

Practical Ways to Align CSR, Sustainability, ESG and Community Investment With Purpose

1. Upgrade Your Terminology

As you begin communicating your social purpose internally, update the language used to describe legacy programs. For example:

- Philanthropy or CSR programs may be described as investments in our purpose.
- Grant budgets may be framed as purpose innovation funds.

Updating the language signals a fresh approach, demonstrates the company's seriousness about purpose and builds internal momentum. Continuing to use legacy terminology can create confusion about what has changed.

2. Reinforce Your Commitments

Adopting a social purpose is an opportunity to revisit existing CSR, sustainability and ESG initiatives – to stop, reprioritize or reinvigorate them. Consider how these efforts could advance your purpose and where they can deliver the greatest benefit.

As one social purpose CEO noted, "*Our purpose is broad enough that we can wedge all of our CSR in, but if we make it more streamlined, we can have more impact.*"

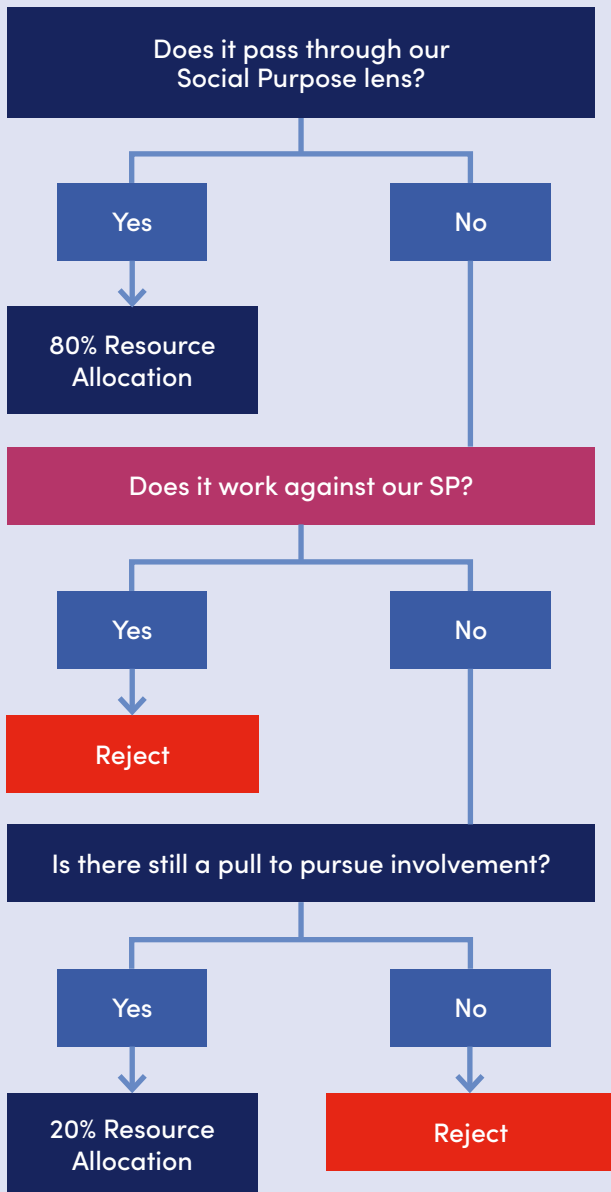
Your purpose can act as a **filter** for community investment decisions. Employee volunteering programs, sponsorships and partnerships can be directed toward purpose-related initiatives. While embedding purpose priorities into CSR or sustainability programs is possible, relying on those programs alone risks leaving the impression that social purpose is simply another CSR activity – which undermines its role as the reason the organization exists.

3. Pivot Your Partnerships

Review whether existing CSR, sustainability, ESG or community investment partnerships – with suppliers, customers, community groups or non-profits – can evolve from transactional or short-term arrangements into longer-term collaborations aligned with your purpose. Purpose-aligned partnerships can foster co-innovation, deepen relationships, build credibility and extend impact beyond what your organization could achieve alone.

See the example below and [this resource](#) for additional examples of aligning CSR, sustainability, ESG and community investment with social purpose.

COMMUNITY INVESTMENT & SOCIAL PURPOSE



Source: Community Savings Credit Union



4.4 Embed Social Purpose in Products and Services

This task translates your social purpose into how your products and services are designed, delivered and improved – so they advance purpose priorities while supporting business performance.

Your products, services and core processes are the primary ways your organization brings its purpose to life. When they are not aligned, purpose risks remaining aspirational rather than lived and can undermine credibility.

After adopting a social purpose, organizations benefit from stepping back to review their **product and service portfolio through a purpose lens**. This reveals which offerings strongly advance the purpose, which are neutral and which may no longer fit as the business evolves – informing **decisions about where to grow, adapt, and enter or exit markets**. It also surfaces opportunities to strengthen purpose impact through existing products, services and brands.

For many organizations – especially small and medium-sized businesses – this work is incremental rather than transformational. It involves refining existing offerings, adding purpose-enhancing features, adjusting how services are delivered or being more intentional about which products and services to grow, adapt or phase out.

Together, these choices form a **practical transition approach** – not a one-time overhaul, but a series of decisions that gradually align what you offer with why you exist.

Truly driving purpose means accepting uncomfortable trade-offs at times

There may be significant (and sometimes controversial) trade-offs that will require principled rationale that can stand up to scrutiny. These predictable dilemmas should be identified early so they can be surfaced, debated and addressed transparently rather than reactively.

Review Your Products and Services Through a Purpose Lens

Begin by reviewing how your current products and services contribute to your purpose priorities. You may find the [Social Purpose Decision Lens](#), introduced earlier, a useful tool for evaluating your products and services. Alternatively, run a simple discussion with leadership, product owners or frontline staff who understand how customers use your offerings.

Ask:

- Which products or services most strongly support our social purpose?
- Where could small changes – such as product extensions, new features or service enhancements – increase purpose impact?
- Where might partnerships or supplier collaboration help advance our social purpose through our products or services?
- Are there offerings or markets that conflict with, or detract from, our purpose and may need to be adapted or phased out?
- How should we approach exiting products or markets that undermine our social purpose, even if this involves short-term revenue or margin trade-offs?
- Where might innovation, new features or new markets advance our social purpose?
- How can customer education, incentives or engagement encourage greater uptake of purpose-aligned products or services?

This review helps distinguish between:

- Products and services to strengthen or evolve because they advance your purpose, and
- Products, practices or markets to rethink or transition away from if they undermine your purpose.

PURPOSE IN PRACTICE**Siemens – Applying and Measuring Social Purpose Through Portfolio and People**

Siemens is a global technology company founded in 1847 and headquartered in Munich, Germany, with approximately 300,000 employees and operations across industry, infrastructure, transport and healthcare in more than 190 countries. Siemens Canada has been part of our national fabric since 1912 and has helped shape the country.

Siemens' purpose is **to create technology to transform the everyday, for everyone**. This purpose defines how the company describes its contribution to society, emphasizing the role of technology in addressing large-scale system challenges.

One way Siemens brings its purpose from intention to impact is by sharpening its focus on technologies that enable customers to decarbonize their operations, infrastructure and value chains. Siemens concentrates on advancing and scaling digital solutions, enabling electrification and system-integration solutions that respond to emerging decarbonization challenges.

These offerings include expanded grid digitalization and software platforms that support higher penetration of renewable energy, new building solutions designed to increase energy efficiency and improve how we manage and interact with buildings, and advanced digital and automation tools that optimize resource and energy use within industrial operations.

Siemens also measures its customers' avoided emissions to account for its real-world impact and support customers' net-zero goals. The company established a baseline and set a goal to enable its customers to avoid more than 1,000 million tonnes of CO₂e through its products and services sold from 2023 to 2030, and transparently published its detailed methodology showing how it calculates avoided emissions.

Siemens has set a target to achieve net-zero emissions in its own operations by 2030 and is in a strong position to achieve this target.

The Siemens example illustrates how social purpose guides innovation priorities, shapes customer offerings and introduces new forms of impact measurement – embedding purpose directly into how value is created and assessed.

Expect Trade-offs and Use Them Deliberately

Aligning products and services with purpose can surface difficult trade-offs. Some decisions may involve forgoing short-term revenue, discontinuing legacy offerings or sunsetting long-standing customer or supplier relationships.

These moments are not signs of failure – they are predictable and necessary tests of whether purpose is being applied authentically. Address them openly, with a clear rationale, to ensure purpose is embedded in the business model rather than sidelined when decisions get hard.

Many organizations find it useful to **pilot and prototype** purpose-aligned changes – testing new features, services, partnerships or delivery models before scaling what works. The fact that some changes will not succeed is part of the process and an opportunity to learn and adapt.

Living your purpose authentically can feel uncomfortable at times. It may involve surfacing new questions in meetings, having more difficult conversations about parts of the business, or re-examining relationships with partners through a clearer purpose lens. These moments of discomfort are a normal part of alignment. Wrestling with these questions helps test whether purpose is truly guiding decisions – and whether the organization is prepared to act in ways that are consistent with its purpose.

Scale the Approach to Fit Your Organization

Larger organizations may formalize this work through structured product reviews, portfolio strategies, investment criteria, procurement standards, market research or capital-allocation discussions.

Smaller organizations can take an informal approach – using regular planning meetings, customer feedback, supplier conversations or small pilots to test purpose-driving improvements.

Embedding purpose into products and services differentiates your business, strengthens customer trust, reduces risk– and ensures that growth aligns with the positive impact your purpose is meant to achieve.



Use the [Social Purpose Product Transition Plan Tool](#) to evaluate your product and service portfolio and identify priority changes, and the [Embed Purpose in Products and Services](#) worksheet to guide your review.

Applying a Social Purpose Lens to Products and Services.

A COFFEE SHOP EXAMPLE



Social Purpose:
To build thriving communities
through ethical coffee

STRONG ALIGNMENT:

Fair-trade beans
→ advance economic justice

OPPORTUNITY:

Add reusable cup discount
→ reduce waste

MISALIGNMENT:

Single-use plastics
→ phase out

PURPOSE IN PRACTICE

TELUS – Delivering Social Purpose Through Core Connectivity Services

TELUS is a Canadian telecommunications company providing network infrastructure, digital services and technology solutions across the country. Its purpose – **to leverage technology to enable remarkable human outcomes** – is expressed through how it designs and delivers its core services.

One way TELUS brings its purpose from intention to impact is by expanding access to connectivity through its telecommunications offerings. As a national network provider, the company invests in broadband infrastructure to reach rural, remote and underserved communities, including Indigenous regions, enabling greater participation in the digital economy.

In addition to infrastructure, TELUS offers targeted service plans designed to reduce barriers to access, including low-cost internet and mobility services for lower-income households, seniors and youth transitioning out of care. These offerings extend the reach of TELUS' core services to populations that might otherwise be excluded.

Through these products and services, TELUS enables access to education, employment, healthcare and social connection. This example illustrates how a company can use its core business capabilities to **deliver meaningful social outcomes at scale**, embedding purpose directly into how value is created and delivered.



PURPOSE IN PRACTICE

GreenShield – Embedding Purpose Through Innovation

GreenShield's social purpose is to **advance better health for all**. As a non-profit social enterprise, it **reinvests excess earnings into social impact initiatives that further its purpose** rather than distributing profits to shareholders. GreenShield puts its purpose into practice by focusing on health system gaps where its capabilities can help address unmet needs and partnering with others to co-create solutions that build on those strengths to improve outcomes and expand access.

Youth mental health is one of Canada's most urgent health challenges. More than 1.2 million youth are affected by mental illness, yet over half of those needing support do not receive care. To help address this gap, GreenShield launched a Youth Mental Health initiative focused on care navigation, equitable access and affordability, co-designed with more than 20 youth-serving organizations, young people with lived experience and mental health leaders.

At the heart of the initiative is an integrated Youth Mental Health Ecosystem that helps young people navigate and access mental health support, including free virtual therapy, digital cognitive behavioural therapy and connections to culturally relevant community-based services. More than 100,000 youth have accessed free mental health supports through the initiative.

Delivered through GreenShield+, GreenShield's integrated health and benefits platform, the Ecosystem brings together GreenShield's capabilities in benefits, care delivery and digital health with the expertise, services and resources of community partners to address barriers to access, affordability and navigation. Through GreenShield+, the Ecosystem is also accessible to plan sponsors and members, including through Employee Assistance Programs, Student Care and Student Health Plans.

GreenShield has also created a Youth Mental Health Data Hub, developed in partnership with Mental Health Research Canada. The Data Hub brings together intersectional data on youth mental health in a publicly accessible resource, helping researchers, policymakers, educators and service providers learn from emerging needs, generating insights that can strengthen supports for youth and students and be applied more broadly across GreenShield's products, services and care delivery.

Guided by its purpose, GreenShield is leveraging its service capabilities and working with community partners to develop and deliver solutions that address unmet health needs. The Youth Mental Health initiative illustrates how social purpose can guide innovation – shaping the solutions a company develops, how they are delivered, and how learning from them can strengthen its broader services and business.

ADVANCED PRACTICE INNOVATING YOUR BUSINESS MODEL THROUGH SOCIAL PURPOSE

Fully integrating social purpose requires examining how it shapes your company's business model. A business model describes how an organization creates, delivers and captures value. This includes its purpose, target customers, offerings, strategies, organizational structures, sourcing and trading practices, and operational processes.

Ensure your approach to value creation reflects why your organization exists. Align your products, services, revenue streams, partnerships and operations with your purpose so they reinforce – rather than contradict – your intended impact. A purpose-led business model creates value for all interest groups while generating the revenue needed to advance its purpose.

Approach business model innovation as a disciplined, test-and-learn process. Rather than attempting large-scale change all at once, use pilots, prototypes and proofs of concept to explore new ways of working. Short, action-oriented innovation sprints allow your teams to test ideas, learn quickly and scale what works – while stopping or redirecting efforts that do not deliver expected results. This approach supports innovation while maintaining focus on day-to-day operations.

Integrate social purpose into business model innovation by:

- Running short, agile innovation sprints to test purpose-aligned ideas.
- Balancing quick wins with longer-term pilots that require sustained investment.
- Testing new offerings, features or business models with current or potential customers.
- Starting locally and expanding regionally or nationally as evidence and confidence build.
- Integrating purpose into new business development and market exploration.

Optional small-scale mechanisms to support testing and learning include:

- Setting aside funding for pilot projects, such as a small internal venture or innovation fund.
- Running short design sessions or hackathons with employees, customers or partners.
- Establishing dedicated units to explore cross-line-of-business opportunities with flexible accountability structures.
- Collaborating with suppliers, customers, competitors, governments or NGOs when opportunities are not immediately clear.

As with any business innovation, feasibility matters. Business model changes should be assessed for both commercial viability and social purpose benefit. Pilots and proofs of concept help validate assumptions, manage risk and inform decisions about whether and how to scale.

Organizations that already use strategy or performance frameworks – such as business model canvas or balanced scorecard tools – can use this stage to explicitly connect social purpose to those systems.

Business Model and Innovation Resources

These optional tools may be helpful when exploring business model innovation through a social purpose lens:

- Agile Innovation: [Reference](#)
- Lean Startup: [Reference](#)
- Business Model Canvas: [Reference 1](#) and [Reference 2](#)
- Value Proposition Canvas: [Reference](#)

PURPOSE IN PRACTICE

TELUS – Advancing Purpose Through a Corporate Venture Fund

TELUS created the [Pollinator Fund for Good](#) to invest in companies and founders driving social innovation. As a corporate venture capital fund, it deploys capital to help early-stage mission-driven businesses scale, while enabling the company to support, learn from and accelerate purpose-aligned innovation.

BUSINESS MODEL TRANSFORMATION EXAMPLE

Social purpose can reshape a business in different ways. The following examples illustrate two distinct forms of business model transformation.



Maple Leaf Foods – From Meat to Protein

Maple Leaf Foods Inc., founded in 1927 and headquartered in Mississauga, Ontario, is a publicly traded protein company with about 9,500 employees operating across Canada and the U.S. This example illustrates how a legacy food company expanded its business model from traditional meat production to a broader purpose-led protein portfolio.

Long known as a meat company, TSX-listed Maple Leaf Foods undertook a deliberate repositioning to become a **purpose-led protein company**, aligning its strategy with evolving consumer expectations, environmental pressures and long-term value creation.

In 2018, the company adopted its social purpose – to **raise the good in food** – alongside a vision to become **the most sustainable protein company on earth**. To translate this ambition into action, Maple Leaf Foods introduced its **Blueprint** – a strategic framework designed to align purpose with growth, innovation, brand investment and sustainability priorities.

This reframing became visible through portfolio and brand decisions. Maple Leaf Foods strengthened its leadership in sustainable meats through **Greenfield Natural Meat Co.**, now the **#1 brand in sustainable packaged meats in Canada** and the **#3 brand in the U.S.**, demonstrating how sustainability leadership could be embedded within core protein categories.

At the same time, the company expanded into plant-based proteins through the acquisitions of **Field Roast Grain Meat Co.** and **Lightlife Foods**. Field Roast ranks **#3 in refrigerated plant protein in the U.S.**, while Lightlife holds leading positions as the **#1 tempeh brand**, **#1 plant-based hot dog brand** and **#1 plant-based bacon brand** in the U.S.

Together, these decisions reinforced Maple Leaf's repositioning from a meat-centred identity to a diversified protein mission, supported by long-term commitments to carbon neutrality, safer food, better nutrition, humane animal care and environmental stewardship.



SOURCE: MAPLE LEAF FOODS

PURPOSE IN PRACTICE

Co-operators – From Insurance to Resilience

Co-operators is a Canadian financial services co-operative founded in 1945. It offers multi-line insurance and investment solutions, as well as personalized services and advice, and employs approximately 7,800 people across Canada. This example illustrates how a co-operative redefined its business model around resilience as a central expression of its social purpose.

At the start of its 2023-2027 corporate strategy, Co-operators elevated its long-standing mission to a social purpose: **To provide financial security for Canadians and our communities.** This aligned with a shift in both mindset and business model, moving from a traditional insurance provider to a resilience-focused organization.

Key changes include:

- Expanding into home services and adjacent models beyond core insurance.
- Launching a resilience accelerator lab to test innovative solutions.
- Expanding products and services to address the impacts of a changing climate, including its TomorrowStrong™ endorsement to support property owners in building back stronger after a climate-related loss.
- Tracking client financial resilience as a proxy for purpose performance.

Together, as a purpose-led organization, these shifts mark a transformation from indemnity-based protection to proactive resilience-building.



The following resources provide practical tools, case studies and examples to help you deepen purpose integration across your organization, strengthen employee engagement and decision-making, align products and services and establish meaningful goals and metrics.

Resources

Case Studies

[Coast Capital](#) Implementation Case Study

[Hemlock Printers](#) Implementation Case Study

Tools and Guides

[Employee Social Purpose Lifecycle Tool](#)

[Social Purpose Performance Management Guide](#)

[Social Purpose Values](#)

[Social Purpose Decision Lens](#)

[Social Purpose Departments Checklist](#)

[Social Purpose Process Metrics](#)

[Social Purpose Impact Goals](#)

[CSR/ESG Transition](#)

[Social Purpose Product Transition](#)

Video

[Bringing Social Purpose to the Heart of Your Business](#)

Tips for Success

- Establish employee engagement early to build shared understanding.
- Update corporate values to build your purpose culture.
- Integrate purpose across the employee lifecycle – from onboarding to recognition.
- Adopt a Social Purpose Decision Lens to guide tough choices.
- Clarify departmental roles for shared accountability.
- Translate your purpose priorities into strategic goals and initiatives.
- Review top products through a purpose lens to identify quick integration wins.

Moving to Step 6: Collaborate and Step 7: Report

With employees engaged, values updated, priorities set and products reviewed, you're ready to move to **Step 6: Collaborate**, working with partners and interest groups to advance and scale the impact of your purpose, and to **Step 7: Report**, where you monitor progress, communicate results and strengthen your purpose over time.

PHASE 2

Social Purpose Progress

Use the [Social Purpose Assessment Tool](#) to assess your current state. By completing **Step 5 (Embed)**, you are advancing progress on the following practices:

Business Model (Practice 3): Purpose-Related

Values: One or more of our values set out the behaviours that guide how we express our purpose in the business and in all our relationships.

Business Model (Practice 4): Future State: Our vision defines the aspirational future state we are working toward if our purpose is fulfilled, and how the world is made better through our purpose.

Business Model (Practice 5): Purpose Management System: Our strategy management system (e.g., business model canvas, balanced scorecard, integrated long-term plans) is designed to advance our purpose.

Business Model (Practice 6): Purpose in Strategy and Investments: Our purpose goals, targets and metrics are embedded in our corporate strategy. Capital and resource allocation reflect our purpose priorities. Priorities are translated into departmental and business-unit goals, plans and day-to-day work.

Governance and Leadership (Practice 9): Executive Purpose Champions: Our company leaders visibly demonstrate support for our purpose, as champions, role models, mentors and coaches to others internally and externally.

Governance and Leadership (Practice 10): Cross-functional Purpose Collaboration: We have a cross-departmental team of senior leaders that meets regularly to ensure we are on track with our purpose goals (could be the executive).

Governance and Leadership (Practice 11): Purpose North Star: Purpose is used to guide “go/no-go” decisions, initiatives and products and provides clarity to our people to guide behaviour on critical issues and in times of ambiguity.

Governance and Leadership (Practice 13): Purpose Decision Lens: When making decisions, staff are expected to ask: Does it help advance our purpose? What changes could be made so that greater purpose is achieved?

Governance and Leadership (Practice 15): Purpose Across Entities: Our subsidiary companies and joint venture partnerships align their strategies and operations to our purpose.

Governance and Leadership (Practice 16): Purpose

Rewards: Purpose is a visible component of our rewards, recognition systems, promotions and incentives; everyone in our organization has purpose-related objectives in their performance plans, reviews and job descriptions.

Governance and Leadership (Practice 18): Consistency of Purpose: The pursuit of purpose is steady, enduring and present through success and adversity.

People and Culture (Practice 19): Purpose Culture: Purpose is a flourishing and measured aspect of the corporate culture, such as employee engagement surveys and audits assessing internal purpose alignment.

People and Culture (Practice 20): Purpose Competency: Our purpose is understood and supported by employees throughout the business. They understand how the purpose of the business connects to the success of the business and their role in it.

People and Culture (Practice 21): Employee Purpose Contribution: Employee-generated innovation and proactive initiative-taking for purpose are cultivated and recognized. Purpose discussions are encouraged, and a process is in place to solicit employee feedback on our purpose efforts and progress.

People and Culture (Practice 22): Purpose Teams: Teams, work groups, functions and business units have purpose-based goals and plans and understand how they directly or indirectly advance our purpose impact goals.

People and Culture (Practice 23): Internal Purpose Communications: Our internal communications reinforce our purpose with employees. We share the stories of our people fulfilling our purpose.

People and Culture (Practice 24): Purpose Recognition: Using a variety of approaches and channels, purpose achievements and successes are recognized and celebrated as are lessons learned from both successes and failures from purpose implementation.

People and Culture (Practice 25): Employee Purpose Lifecycle: Our purpose is evident across the employee lifecycle (e.g., employer brand, recruiting strategies, recruitment interviews, offer letters and orientation through to retirement, legacy planning and retiree engagement).



People and Culture (Practice 26): Employee Purpose Capability: Our employees have the skills, knowledge and confidence to activate our purpose at work.

People and Culture (Practice 27): Purpose Leadership Development: Purpose leadership competencies are consciously cultivated (e.g., they are reflected in the competency model, leadership and career development, succession planning).

Operations (Practice 28): Purpose in the Workplace: Our office policies, practices and physical premises visibly demonstrate our purpose ethic.

Operations (Practice 29): Purpose-centred Organizational Design: Our departments, reporting lines, leadership team, and roles are organized to integrate purpose into how the business operates.

Operations (Practice 30): Purpose Innovation Hub: Our offices, sites and branches are hubs of purpose-driven innovation. Our business is used by us or partners in our value chain as a test site for purpose innovations and solutions.

Operations (Practice 31): CSR and Sustainability

Purpose Alignment: Our corporate social responsibility, sustainability and community investment strategies link to, reflect and advance our purpose.

Customer Experience and Marketing (Practice 37):

Purpose-oriented Product Design: Our purpose is considered during product or service development; processes allow products or services to be changed when they do not demonstrably advance our purpose.

Customer Experience and Marketing (Practice 38):

Purpose Product Portfolio: All our products and services visibly and meaningfully advance our purpose, and any misaligned offerings are actively reviewed and addressed over time.

Download the full [Social Purpose Assessment Tool](#) to baseline your progress and set five-year ambitions.



Collaborating Beyond Your Organization

With employees engaged and your purpose embedded in your culture, strategy and products, attention now shifts beyond the organization.

This section covers **Step 6** of the **Social Purpose Roadmap** and shows how social purpose is expressed through customer experiences, external relationships and collaboration – extending impact beyond your business boundaries.

As your organization implements its Social Purpose Implementation Plan, collaboration becomes a primary way of delivering on the long-term social purpose impact goals identified in your corporate strategy. **While embedding purpose within your organization focuses on achieving *process* and *integration* goals, collaboration focuses on achieving your *long-term social purpose impact goals* – the broader societal outcomes your purpose seeks to create.** It is a strategic lever that enables your organization to extend your impact, access complementary capabilities, manage shared risks and create value that cannot be achieved alone. Many of the outcomes associated with these impact goals sit beyond the direct control of any single organization, making collaboration essential to creating lasting social value.

This section addresses how you embed social purpose in customer and interest-group relationships, form collaborations that advance your social purpose impact goals and contribute to the broader **Purpose Economy**.

Step 6 At a Glance

- Embed social purpose in the customer experience.
- Prioritize and engage interest groups.
- Build external social purpose collaborations.
- Advance the Purpose Economy.

Step 6: Collaborate

Step 6 focuses on working with customers, partners and other interest groups to advance your social purpose beyond the organization. At this stage, purpose begins to shape how value is created and shared externally – through relationships, collaboration and collective action.

You can implement these tasks at a scale appropriate to your organization – from informal relationship-building and pilot collaborations to more structured partnerships and initiatives.

“We believe the best way to create lasting value is to create value for everyone connected to the business – our people, customers, communities and the planet we share.”

– MICHAEL MCCAIN, EXECUTIVE CHAIR AND FORMER CEO, MAPLE LEAF FOODS

6.1 Embed Social Purpose in the Customer Experience

Embedding social purpose in the customer experience ensures customers encounter it consistently across its offerings and communications and creates opportunities for customers to actively advance it. **This work should follow internal engagement on purpose. When employees understand the purpose and how it shapes decisions, they are better equipped to bring it to life credibly in customer interactions.**

Principles for Embedding Social Purpose in the Customer Experience

Effective customer-facing purpose follows core principles:

- **Internal understanding comes first.** Purpose shows up externally only when employees already understand and believe in it.
- **Purpose should be experienced, not just stated.** Customers should be able to see, feel or participate in your purpose through products, services, service interactions and business decisions – not just through messages or slogans.
- **Purpose communication must be integrated, not episodic.** Purpose is not a one-off campaign or a tagline added to every message. It should be woven into your brand and amplified at the right moments through real actions.
- **Proof matters more than claims.** Authentic purpose communication relies on reasons to believe – human stories, concrete examples and data that demonstrate how purpose is being lived. Organizations can actively invite customer-facing employees to surface examples and proof points, strengthening both credibility and internal buy-in.
- **Purpose is a dialogue, not a broadcast.** Customers and interest groups should be invited to ask questions, share feedback and participate in shaping how purpose comes to life.
- **Make your audience the hero.** Frame purpose communications around the role customers and other interest groups can play in advancing the purpose, rather than positioning the company as the hero.

PURPOSE CHALLENGE

Price, quality and customer experience are now table stakes – expected, but no longer enough to stand out. Purpose provides the differentiation that builds competitive agility, deeper loyalty and lasting competitive edge.

Plan How Social Purpose Will Be Communicated to Customers

You don't need to put purpose front and centre in every communication. Instead, make it a felt and consistent part of the customer experience.

When planning external communication of your purpose:

- Be clear about the moment you're responding to and the outcome you want (e.g., strengthen competitive positioning, build trust, invite involvement).
- Identify your key customer and interest-group audiences.
- Align messaging across marketing, communications, sales and customer service so purpose shows up consistently through stories, examples and proof points.

These planning steps apply whether your customers are retail consumers (B2C) or business organizations (B2B). What changes is the mix of channels, touchpoints and evidence used to demonstrate your purpose.

The example on page 99 shows a phased, internally grounded approach to [external social purpose communications](#). Draw on it for ideas on what you can do at your company.

For small and growing businesses, see the Simple Purpose Communications Plan on the next page. For further guidance and examples on external social purpose communications, see this tool: [Social Purpose External Communications](#).

Rights-Respecting Terminology

The term “stakeholder” can be inappropriate when referring to Indigenous Nations, as it may obscure their status as rights and title holders and reinforce colonial decision-making frameworks.

Consider the following terminology:

- Rights and Title Holders for Indigenous Nations
- Interested Parties/Groups or Interest Holders for others

Note: This toolkit uses the term interest groups in place of stakeholders.

SIMPLE PURPOSE COMMUNICATIONS PLAN

For small and growing businesses, these four quick actions provide a practical way to begin communicating your purpose.

1. Choose one proof-point story

Pick a single real example that shows your purpose (e.g., a customer outcome, community impact or change in how you operate). Turn it into a short story you can share on your website, in a newsletter or in conversations.

2. Pick one two-way channel

Choose one place where you can invite dialogue about your purpose (e.g., a social post asking for ideas, a question in a customer survey or a prompt in a client meeting). Listen for what resonates and what questions people have.

These small steps keep the work manageable, build early proof points and ensure your purpose is communicated as a lived reality, not just a slogan.

3. Align one core message across touchpoints

Write a simple, plain-language sentence that links what you do to your social purpose. Use the same sentence (or a close version) on your website, in proposals and in email signatures so customers hear a consistent message.

4. Give employees one simple update

Share with your team why you are introducing your purpose externally, the proof-point story you chose and how they can describe your purpose in their own words when customers ask.

Measure Customer Purpose Engagement

Before embedding purpose in touchpoints or communicating externally, **establish a baseline** for how customers experience your purpose. Track purpose-specific measures alongside standard measures like Net Promoter Score (NPS) and Customer Satisfaction (CSAT) (or Customer Effort Score [CES] for B2B) if you use them.

Establish a **Customer Purpose Perception Score** using the following statements. Ask respondents:

On a scale of 1 to 5, how true are the following statements?

- I believe the company is authentic and purpose-driven.
- By being in a relationship with this company, I feel I contribute to making the world a better place.
- I would recommend this company to others because of its purpose.

These statements provide a starting point – see the full set in the [Purpose Perception Survey Toolkit](#). They establish your baseline, allowing you to compare results after embedding purpose in customer touchpoints and communications.

Why baseline first: Without this starting point, you can't prove your efforts shifted customer perceptions or justify what to prioritize.

This lets you measure customer purpose engagement – how well they understand, feel aligned with and actively support your purpose – and adjust your communications and offerings accordingly.

Next, assess your internal readiness before communicating your purpose externally.

Assess Communication Readiness

Before launching external communications about your social purpose, **confirm your organization is internally prepared**. Key readiness factors include:

- Lived proof points.
- Purpose embedded in operations with concrete stories and examples.
- Leadership alignment.
- Executives and board unified on purpose messaging.
- Risk and compliance mitigation.
- Historic issues or brand risks addressed to avoid skepticism.

Assess your readiness using the Exercise on the next page.



EXERCISE: EXTERNAL COMMUNICATIONS READINESS CHECK

Test your internal readiness for external communications with this exercise to confirm proof points, alignment, leadership buy-in and evidence-backed claims.

Ensure your organization is aligned internally before going public. In order for the organization and its communications to be perceived as authentic and genuine, build proof points of your purpose in advance using the prompts below.

Signs you may be ready to communicate:

- Our purpose has been part of our DNA for some time, not just a new statement.
- We have been advancing the issues in our purpose for years and can point to specific stories and examples that demonstrate it in action.

- We are approaching a meaningful milestone (e.g., a major anniversary or a leadership/ownership transition) that provides a natural moment to share our purpose.

Signs you may need more time before a big public launch:

- The ideas embedded in our purpose are new to our company and interest groups; we need to build proof points to demonstrate authenticity.
- We have historic brand risks or unresolved issues that could undermine our purpose message and need to be addressed before we communicate more broadly.
- Employees don't understand our purpose or believe the leadership is committed to it.

You can still talk about your purpose in smaller, grounded ways while you build proof points, but a major external “launch” should wait until you have some lived evidence behind the words.

In an environment where many people are skeptical of corporate claims, companies must earn trust by being transparent about both progress and gaps, rather than presenting a perfect picture.

Once an organization is ready to communicate externally, purpose begins to extend beyond owned channels through earned communications and third-party amplification.

EXAMPLE: COMMUNITY SAVINGS CREDIT UNION EXTERNAL SOCIAL PURPOSE COMMUNICATIONS PLAN

Use this to get ideas for your own phased approach. This example illustrates a phased, internally grounded approach to external social purpose communications.

Social Purpose:

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

Month 1

Objective: Ensure key messaging around our social purpose is clear

Target Audience: Executive team

Craft the key messages around our social purpose and a challenging Q&A to ensure that all the executive team members understand the social purpose and how this informs our business decisions. Defining what we stand for, what we don't stand for and how we are good corporate citizens will shape internal conversations with the wider company.

Activities included:

- Executive education and planning sessions.
- Key message development.
- Challenging Q&A development.
- Detailed guide on how we use our Social Purpose Decision Lens to identify the issues we lead on, the issues we support and the issues we are against.
- Development of an HR guide outlining how the social purpose will be implemented through job postings, new hiring, reviews, remuneration and development.

Months 2–3

Objective: Ensure company-wide support

Target Audience: Employees

It is key that our social purpose is understood and supported by all our employees. Activities included:

- Town hall meetings with branches (executive road show).
- Internal sessions with line managers to discuss the social purpose and how it affects day-to-day work.
- A half-day workshop to identify social purpose issues the organization could take a leading role in versus a supporting role.
- Identifying social purpose champions throughout the company and assigning roles and responsibilities.

Months 3–5

Objective: Ensure our external-facing communications and visual identity reflect our social purpose

Target Audience: Members (Customers)

Activities included:

- Refreshed brand guidelines and messaging platform.
- Refreshed website design, including a “Values/ Issues We Care About” section.
- Updated brand imagery.
- Updated email signatures.
- Updated social media bios with social purpose.
- Updated boilerplate language for media relations.
- Integration of social purpose messaging into media interviews.
- Updated marketing materials.
- Updated event materials.
- Creation of an impact year-end report to engage members, union partners and charities.

Months 5–8

Objective: Create more impact

Target Audience: British Columbians

Activities focused on:

- Developing products and services that best fit the social purpose.
- Working with credible organizations in areas where the organization is still learning.
- Developing campaigns that “unite working people to create a more just world.”
- Partnering with organizations aligned with the social purpose.

Embed Social Purpose in Customer Touchpoints

As you assess communication readiness, begin embedding purpose across touchpoints while building proof points.

Make your social purpose visible. Every interaction – from packaging and invoices to social media and premises – leaves a lasting impression and is an opportunity to express your purpose.

To start, review all external communications for embedding opportunities and ensure consistent disclosure across websites, reports and other customer-facing materials.

- Update digital and physical materials (e.g., websites, proposals, logos, advertising, investor and customer materials across traditional, digital and social channels) to reflect your purpose and how it shapes products and services.
- Make purpose visible in high-frequency engagement moments such as email signatures, invoices, work orders, proposals and on-site signage.
- Publicly launch your purpose at an appropriate moment, using stories and concrete examples of purpose-influenced decisions, supported by regular progress updates.
- Equip sales, marketing and customer-facing teams to explain your purpose clearly and consistently, and to link it to customer value, products and services.

PURPOSE IN PRACTICE

Hemlock Printers – Planned, Multi-Channel Customer Engagement

Social Purpose: To create connections, build community, and inspire actions that safeguard the health of the world's forests.

Hemlock Printers embedded its social purpose into the customer experience by integrating it across external communications and customer touchpoints. The company trained its sales team to articulate the value of its social purpose, developed marketing materials that explain how its purpose shapes its products and services, and updated its website to reflect its purpose. Hemlock also launched its social purpose publicly through a customer-facing event and engaged customers by promoting purpose-aligned offerings, including its net-zero products.

How Social Purpose Companies Communicate Purpose on Their Website

Many social purpose companies use their websites as a primary channel to clearly express why they exist and how their purpose shapes what they do.

- **BDC** uses its “[Purpose and values](#)” page to explain why it exists and how that purpose guides its financing and advisory services.
- **Cool Air Rentals** integrates purpose into its [website](#), showing how operational choices and services contribute to its purpose.
- **Hemlock Printers** shares the story behind its purpose on its [website](#) and how it informs business decisions, culture and long-term direction – building credibility through transparency and reflection.
- **Maple Leaf Foods** communicates its purpose on its [website](#) as *Raise the Good in Food* and uses its Blueprint to show how that purpose guides strategy, priorities and decisions across the business.
- **Pro-Claim Group** clearly articulates its purpose on its [website](#) and links it directly to the projects and infrastructure work it delivers, reinforcing purpose as core to how it operates.
- **Rio Tinto** communicates its purpose on its [website](#) as a shift in how the business creates value – prioritizing the metals and materials needed for a low-carbon future.

Wherever possible, design interaction points so customers actively support your purpose – such as choosing purpose-aligned products or services, participating in campaigns or events, sharing their own stories or contributing time, data, ideas or resources that advance the impact.

Check out this resource for a comprehensive touchpoint inventory: [Customer Social Purpose Lifecycle Roadmap toolkit](#).

For further guidance and examples on integrating social purpose across the customer journey, see the [Social Purpose Customer Lifecycle](#) toolkit.

Mobilize Customers as Purpose Partners

Once purpose is visible in touchpoints, and measurement confirms purpose resonance, invite customers to actively join your journey. People want to feel part of the solution – give them simple ways to participate, co-create change and amplify your impact. At its most powerful, **this builds a movement around your brand**, where customers rally together to contribute to shared goals. Reimagine your customers as partners who scale your impact, contributing through:

- Joint volunteering or collaborations with impact organizations.
- Purpose-aligned giving (e.g., portion of sales to causes).
- Acting as sales channel partners by referring or reselling in their networks.
- Contributing ideas, data or stories to advance your purpose.

Reimagining the Customer Role

Customers can act as sales partners through channels they control or influence, participate in crowdsourcing to help fund your innovations or even invest financially in your growth for exclusive perks. No harm in asking your customers to commit more – their potential roles (and value) have virtually no limit.

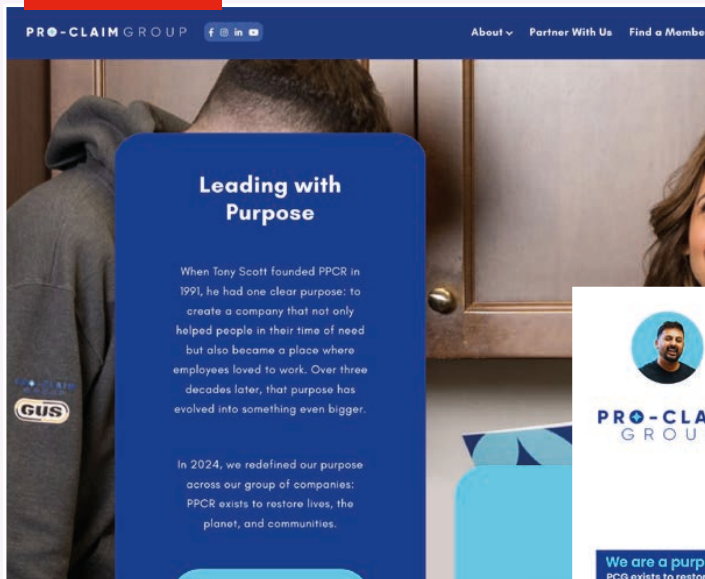
PURPOSE IN PRACTICE

Pro-Claim Group – Simple, Consistent Purpose Visibility at Interaction Points

Pro-Claim Group provides an example of how social purpose can be communicated to customers and interest groups through high-profile, everyday interaction points. The company makes its social purpose visible in places where customers regularly encounter the brand.

Pro-Claim Group showcases its social purpose prominently on its website and reinforces it through employee email signatures, helping ensure that customers and interest groups consistently encounter the company's purpose across key communications.

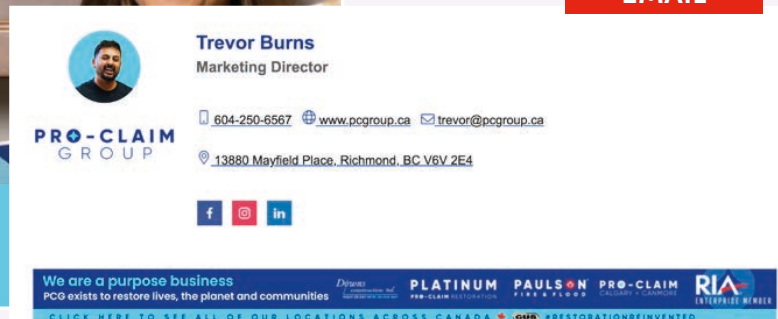
WEBSITE



Social Purpose:

To restore lives, the planet and communities.

EMAIL





Tell their story not just yours. Share customer successes via case studies, testimonials and social media. Provide shareable tools like badges (“Proud Purpose Partner”) or memes so they broadcast their purpose-driven identity to their networks. This builds emotional connection, turns buyers into brand advocates and creates a self-reinforcing movement around your brand.

How this shows up will vary depending on whether your customers are individuals or organizations.

For business customers, mobilizing them includes encouraging and supporting clients to adopt a social purpose themselves, creating alignment around common goals and opening opportunities for deeper partnerships or joint ventures.

“We go by the saying: ‘people buy and companies pay.’ We’re all B2P – Businesses selling to People. Sales should lead with heart.”

– CHRIS PEACOCK, FORMER CHIEF MARKETING OFFICER, TRACTION ON DEMAND

EXAMPLE: ENGAGING CUSTOMERS THROUGH EVERYDAY PURPOSE TOUCHPOINTS

This example shows how a company can use everyday customer communication touchpoints to reinforce its social purpose and invite customers to play a role in advancing it.

Please review your order details and contact us as soon as possible if any details are incorrect. If you want to check your order status, reschedule, or cancel your order click [here](#) or log into your IKEA account online.

It is always our goal to provide you with the best customer experience possible. However, if you're not completely satisfied, please feel free to [contact us](#).

Did you know? We are on our way to using only renewable, recycled and recyclable materials by 2030 – in our products, packaging and shipping. Learn more about how we are creating a sustainable everyday [here](#). Thank you for doing your part by reusing or recycling your packaging.

*Yours everyday,
IKEA Canada*

Use Multiple Channels: Owned, Earned and Paid

Build trust, engagement and collaboration opportunities through consistent presence across owned, earned (media coverage and customer content) and paid channels. When interest groups encounter your purpose consistently – through what you say, what others say about you and how you act – it strengthens trust and creates emotional connection and partnership potential. Research shows that when purpose appears in only a few channels, customers are less likely to view it as authentic. **Small businesses can get going with website and email messaging, everyday in-person interactions and one or two simple ways customers can participate.**

Social Purpose Companies Can Earn Disproportionate Visibility

Community Savings Credit Union, whose purpose is to unite working people to build a just world, secured 64% of earned media share of voice within its direct peer group – illustrating how a clear, consistently expressed social purpose can attract third-party coverage and amplify impact beyond owned and paid channels.

- **Owned:** Owned channels are the easiest to control. Your website, social media, newsletters, blogs, facilities, packaging and in-person experiences are often the easiest places to start. Aim for purpose to be evident from the moment customers encounter your organization or pick up a product. Internal communications are also critical; when employees understand goals, progress and achievements related to your purpose, they act as authentic ambassadors. Research shows that many employees are willing to share company content and use branded hashtags with their social media networks.

Purpose Drives Loyalty

Purpose-led brands build stronger, more resilient customer relationships – driving higher sales and lifetime value. Purpose bolsters brand confidence, offering protection from trust incidents and safeguarding the bottom line. Even if trust falters, a meaningful purpose increases the odds that customers will give a business a second chance.

- **Earned:** Media coverage, partnerships and others' storytelling about your work amplify your purpose and its impact. By taking a stand on social issues connected to your purpose, publishing research or thought leadership on a social purpose topic, launching a social purpose campaign, participating in moments such as International Women's Day, National Day for Truth and Reconciliation, Earth Month, Canada's Purpose in Business Week, or open-sourcing frameworks and solutions that enable replication and collaboration across your industry, you create opportunities for others to share, extend and carry your purpose into the public conversation.
- **Paid:** When appropriate, paid channels – such as ads, sponsored content or promoted posts – bring your purpose into customers' daily lives and newsfeeds. Paid channels work best when you tailor messages to different audience segments and contexts while keeping your core purpose consistent.



From Managing to Mobilizing:
A conventional business *manages* resources and relationships; a social purpose business *mobilizes* them around its purpose.



Marketing's Role in a Purpose-Led Business

In a purpose-led business, marketing shifts from:

- Product advertising → Purpose-led brand experiences.
- One-way communication → Purpose-inspired customer stories.
- Passive recipients → Co-creators of purpose offerings and actions.

More and more customers want to know the people and values behind a brand. This is increasingly part of the value proposition. As purpose becomes embedded in everything you do, it becomes an integral part of the customer experience – and a lens through which customers evaluate your authenticity and impact.

Action Step: To help marketing teams shift from traditional promotion to purpose-led engagement, convene an internal discussion focused on how social purpose should shape marketing strategies, priorities, channels and measures of success. Use [Marketing on Purpose](#) as a shared pre-read to explore how marketing evolves from selling to dialogue, trust-building and customer participation.

Guide the conversation using the [Social Purpose Continuum](#). Ask marketers: “Where are we today: which stage do we want to reach in 12 months or five years?”

Building a Purpose-Led Brand Community

The continuum below maps marketing's evolution across four maturity stages. At its most advanced, marketing builds a community that actively extends the organization's purpose.

Customers, consumers and partners become contributors – shaping, sharing and growing the brand and its impact.

Brand loyalists become ambassadors for your products, services and purpose. They understand the impact you are creating, believe in it and choose to participate in it.

With the right conditions, this community becomes a powerful extension of your marketing efforts – driven not by promotion, but by shared purpose and collective action.

As purpose matures from philanthropic to social purpose, customer relationships transform from transactional exchanges to movement-building partnerships.

These partnerships extend your purpose beyond customer relationships and into a broader ecosystem of partners and interest groups.

SOCIAL PURPOSE MARKETING CONTINUUM

Stage	Customer Purpose Role	Brand Promise	Marketing
1.0 Philanthropic	None	Quality: aware company donates money	Paid advertising tells a story
2.0 Strategic	Volunteer/donate	Trust: aware of how company contributes to community	Earned media/cause marketing tells a story
3.0 Integrated	Join/co-create	Pride: aware of company's socially beneficial impacts	Customer tells a story
4.0 Social Purpose	Customer movement	Meaning: believe society is better off if they do business with the company and that as customers, they are part of a social movement	Everything you do tells a story

FIGURE 24: ADAPTED FROM SOCIAL PURPOSE CONTINUUM (STRANDBERG 2015)

PURPOSE IN PRACTICE

Intrepid Travel – From Customers to Purpose Partners

Intrepid Travel shows what it can look like when customer relationships evolve beyond transactions to become part of delivering a company's purpose. Through its travel experiences, Intrepid engages customers in its purpose while working with local communities, suppliers and other partners to extend its impact across a broader ecosystem. The case study illustrates how **purpose can become part of the customer experience** itself – and how customers and value-chain partners can help bring that purpose to life.

See the full [Intrepid Travel case study](#).



PURPOSE CHALLENGE

Brands no longer belong just to the company – they're community property. Customers, employees and interest groups all shape and sustain them. Purpose-led businesses invite customers to co-own the brand's story, turning buyers into advocates who amplify impact through their networks and choices.



6.2 Build External Social Purpose Collaborations

Social purpose businesses have an opportunity to advance their purpose and extend their impact by working with others, including customers and a broader set of partners and interest groups. Through these collaborations, you can **access external knowledge, expertise, relationships and resources**. Social purpose collaborations increase the scale and effectiveness of solutions, while sharing costs, risks and learning.

Put another way, **your social purpose cannot be realized by acting alone**. Collaboration enables your organization to extend its reach and influence – creating shared value and greater impact with customers, partners, peers and other actors in your ecosystem. This section focuses on building external social purpose collaborations and prioritizing and engaging key interest groups that can help advance your social purpose goals. It builds on previous guidance on engaging customers – how your purpose is expressed through your customer relationships – extending the focus to a wider set of interest groups and system actors essential to enabling progress on your purpose.

This may involve working with non-profits, community organizations, suppliers, customers, industry peers (and, where appropriate, competitors), governments, or academic and subject-matter experts. By engaging others around shared objectives, organizations build coalitions of common purpose and achieve outcomes that would be difficult to reach independently.

Given this, collaboration becomes a defining strategy for making progress on your purpose. The form and scope of collaboration should reflect your purpose, capacity and context – from small pilots to long-term multi-interest-group initiatives.

Definition of Social Purpose Collaboration

Unlike **transactional partnerships**, which centre on exchanging value (such as sponsorships, procurement relationships or short-term projects), **social purpose collaborations** are defined by:

- **Joint commitment:** advancing a shared social purpose goal.
- **Shared outcomes:** joint accountability for impact.
- **Longer time horizons:** commitments three to five years or longer
- **Mutual value creation:** benefits all parties and systems.
- **Adaptive evolution:** learning and iteration over time.

The Business Case for Social Purpose Collaboration

To engage in collaboration effectively, your organization needs a clear understanding of why it is doing so and what it is trying to achieve.

The framework on the next page (Figure 25) shows the “collaboration sweet spot” – where what the world needs from you intersects with what you need from others to achieve your social purpose.

Research Note

These practices are drawn from the **Social Purpose Collaboration Guide for Business: Advancing Purpose Through Collective Action and Influence**, developed through research supported by the Social Sciences and Humanities Research Council of Canada. The project was led by **Dr. Ingrid Kajzer Mitchell**, Associate Professor, School of Business at Royal Roads University, in collaboration with the Canadian Purpose Economy Project.

The research generated a set of evidence-informed collaboration practices designed for practitioner use. Selected frameworks and graphics reproduced in this section were developed through the research and are included with permission as part of CPEP's broader professional resource offerings.

FINDING YOUR COLLABORATION SWEET SPOT

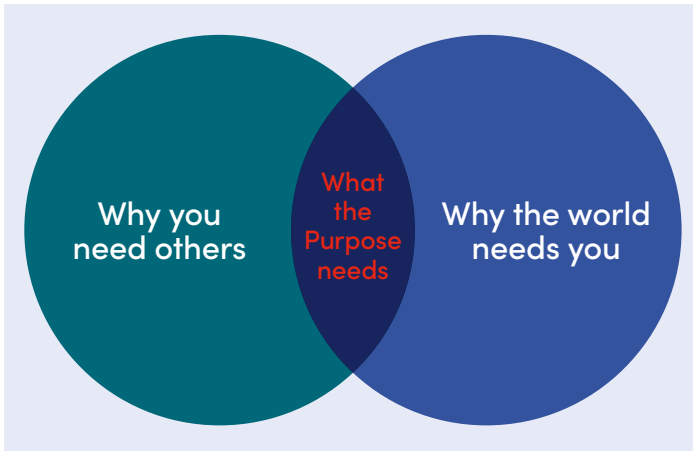


FIGURE 25: IDENTIFYING THE COLLABORATION SWEET SPOT AT THE INTERSECTION OF WHAT THE WORLD NEEDS FROM YOU AND WHAT YOU NEED FROM OTHERS (DEVELOPED BY KAJZER MITCHELL, 2025)

Purpose collaborations take shape at the intersection of these two forces:

1. **Why you need others:** The resources, expertise and influence of partners that are essential to achieving your social purpose goals.
2. **Why the world needs you:** The distinctive value, innovation and social impact your organization brings to collective efforts.

The overlap represents your highest potential for impact. Concentrating collaboration here reveals opportunities for collective action that amplify results and create shared value.

This is where collaboration becomes a business advantage – delivering benefits that strengthen performance while advancing your social purpose.

“A lot of businesses are scared to embark on purpose because it’s so huge. And it doesn’t even seem attainable and that’s just the thing. No, it’s not for you alone but it is attainable when you start finding those other people who align with your purpose and start making new things happen.”

– MARY ELLEN SCHAAFSMA,
FORMER DIRECTOR, SOCIAL PURPOSE
INSTITUTE, UNITED WAY BC



The business benefits of collaboration can be understood across four key categories as outlined in the table below:

HOW COLLABORATION CREATES BUSINESS VALUE

Business Benefit Category	What Collaboration Enables
1. Extend social purpose impact and influence across systems.	• Expand reach, influence and scale across systems (a system is the network of organizations, people and relationships affecting your purpose). • Amplify and accelerate your social purpose impact. • Shape industry standards and practices. • Influence policy and build political support. • Strengthen broader system legitimacy and trust. • Raise awareness of the societal issue and help build momentum for collective action.
2. Access capabilities and resources to advance your purpose beyond the organization.	• Access complementary expertise, technical support and new technologies. • Access information and knowledge. • Access new networks, funding and other resources.
3. Strengthen innovation, performance and resilience in pursuit of your purpose.	• Unlock and accelerate innovation and learning. • Open new markets, customer segments and business opportunities. • Increase operational efficiency. • Increase resilience and adaptability. • Share and reduce the risk of new approaches. • Strengthen interest-group trust, credibility, loyalty and legitimacy.
4. Build trust, reputation and relationships aligned with your purpose.	• Demonstrate thought leadership and build reputation. • Increase marketplace differentiation. • Attract and retain skilled talent.

FIGURE 26: THE BUSINESS BENEFITS OF SOCIAL PURPOSE COLLABORATION

Articulate the business rationale to position collaboration as a strategic investment, not a discretionary activity. Collaboration benefits not only your organization but also partners, communities and the broader ecosystem connected to your social purpose.

These benefits arise because collaboration gives businesses access to network-level resources – shared expertise, tools, relationships and learning – that extend beyond what any single business can develop on its own.

How to Build a Social Purpose Collaboration

Create a social purpose collaboration through **four phases: prepare and assess, initiate and engage, innovate and adapt, and evaluate and evolve**, as shown below. Each phase builds on the previous one, moving the organization from planning to action, learning and longer-term impact.

FOUR PHASES OF SOCIAL PURPOSE COLLABORATION

1 Prepare & Assess	2 Initiate & Engage	3 Innovate & Adapt	4 Evaluate & Evolve
- Identify Social Purpose Goal from Strategy - Agree on Business Rationale for Collaboration - Conduct Collaboration Gap & Opportunity Assessment - Map the Social Purpose Ecosystem - Prioritize Interest Groups/Actors to Engage - Assess Collaboration Readiness	- Reach out to Priority Interest Groups/Actors - Align on Collaboration Purpose & Scope - Design the Collaboration Structure & Governance - Establish Shared Goals & Metrics	- Co-create Solutions - Pilot & Test - Iterate & Refine	- Measure Purpose Impact - Strengthen & Sustain - Continuously Improve - Scale, Change or Sunset

FIGURE 27: SOCIAL PURPOSE COLLABORATION PHASES (COLLABORATIVELY DEVELOPED BY KAJZER MITCHELL & CPEP)

The four phases provide a practical pathway to build a social purpose collaboration – from clarifying your goal and readiness, to engaging partners, co-creating solutions and strengthening impact over time.

While these phases appear sequential, collaboration is not strictly linear. You may move back and forth between phases as relationships deepen, new insights emerge or conditions change.

Success depends most on the first phase. Investing time upfront to clarify your goal, assess readiness and engage the right partners will significantly increase the effectiveness and durability of your collaboration.

The sections that follow provide detailed guidance for each phase, starting with Prepare and Assess.

Phase 1: Prepare and Assess

The Prepare and Assess phase is critical – investing time in preparation sets the foundation for long-term success. This phase includes six key steps.

1 Prepare & Assess	2 Initiate & Engage	3 Innovate & Adapt	4 Evaluate & Evolve
- Identify Social Purpose Goal from Strategy - Agree on Business Rationale for Collaboration - Conduct Collaboration Gap & Opportunity Assessment - Map the Social Purpose Ecosystem - Prioritize Interest Groups/Actors to Engage - Assess Collaboration Readiness	- Reach out to Priority Interest Groups/Actors - Align on Collaboration Purpose & Scope - Design the Collaboration Structure & Governance - Establish Shared Goals & Metrics	- Co-create Solutions - Pilot & Test - Iterate & Refine	- Measure Purpose Impact - Strengthen & Sustain - Continuously Improve - Scale, Change or Sunset

Step 1: Identify Social Purpose Goal to Pursue Through Collaboration

From the long-term social purpose impact goals in your corporate strategy or business plan, determine which are best advanced through collaboration and how working with others will enable you to achieve them. Reflect on:

- What social or environmental outcomes or impacts are you aiming to achieve to fulfill your purpose?
- Why can't this outcome be achieved alone?
- How would collaboration strengthen or accelerate this outcome?
- What capabilities or resources are missing internally?

- What would success look like if others were involved?

Refer back to the social purpose goals and measurement framework of your corporate strategy, illustrated below. Select one of your long-term impact goals to serve as the foundation for your collaboration efforts. It is likely to be the one most closely aligned to your Vision, your 10+ year system-level goal and relevant metrics.

Not every goal requires the same level of collaboration. Choose the goal where working with others is likely to make the greatest difference.



FIGURE 28: SOCIAL PURPOSE GOALS IN THE CORPORATE STRATEGY

Step 2: Clarify the Business Rationale

Once you identify the goal, build internal agreement on why you are initiating the collaboration.

Clarify your business rationale to secure internal alignment and ongoing support and to filter partnership opportunities to those most aligned with your purpose and strategic priorities.

Review Figure 26, The Business Benefits of Social Purpose Collaboration, on page 108 with your Social Purpose Steering Committee and agree on the top reasons for collaboration.

Share this rationale with your leadership to ensure collaboration is recognized as a strategic investment, and not a discretionary activity. This secures internal buy-in and sets the stage for success.

The **Virtuous Cycle of Collaboration Benefits** illustrates how the business benefits of collaboration reinforce one another over time. By collaborating, a social purpose business expands its reach, scale and influence and unlocks innovation, while increasing access to new markets and resources, mitigating risks and improving efficiencies. Share this image with your team to build understanding, spark discussion and gain agreement on the strategic value of collaboration.

COLLABORATION BENEFITS: A VIRTUOUS CYCLE



FIGURE 29: VIRTUOUS CYCLE OF COLLABORATION BENEFITS
(COLLABORATIVELY DEVELOPED BY KAJZER MITCHELL AND CPEP)



Step 3: Conduct a Collaboration Gap and Opportunity Assessment

A Collaboration Gap and Opportunity Assessment

evaluates your organization's capabilities against your selected social purpose goal to identify strengths to leverage and gaps to fill. This determines the types of partners – and their roles – needed for success.

Assess what your organization brings to the table across four areas: capabilities, assets, relationships, and platforms and influence – your organization's Core Competencies and Assets (see Figure 30 below).

If you completed the “Develop” phase of the Social Purpose Toolkit, draw on your earlier Core Competencies and Assets analysis. If not, use the framework below to quickly assess your organization's strengths.

Based on this assessment, answer the following:

- Where can we contribute our strengths alongside others?
- **Why we need others** – who can fill our gaps for mutual success?

- **Why the world needs us** – who would benefit from our unique capabilities?
- Who are we already partnering with that we can do more with?

From these answers, select specific partners with collaboration potential.

Outcomes of this assessment:

- Clear understanding of **internal strengths** to leverage.
- Insight into **gaps** that potential partners can address.
- A preliminary list of **key actors** to engage.

These partners then form the basis for Step 4 on ecosystem mapping.

CORE COMPETENCIES AND ASSETS FOR COLLABORATION

CAPABILITIES What your people know and can do	☐ Employee time, skills and expertise, including volunteering and pro bono work ☐ Professional knowledge and lived experience ☐ Leadership and management capability ☐ Innovation, problem-solving, research and service-delivery capacity
ASSETS What your business owns, operates or controls	☐ Products and services ☐ Land, retail outlets, branches, facilities and other physical locations ☐ Community investments, donations and sponsorships ☐ Infrastructure, equipment and technology platforms ☐ Data and intellectual property ☐ Financial capital and investment capacity
RELATIONSHIPS Who your business is connected to and trusted by	☐ Employees and workforce relationships ☐ Customers and clients ☐ Industry peers, business partners, suppliers, vendors and contractors ☐ Community organizations, unions and governments ☐ Universities, technical and research institutes and think tanks
PLATFORMS AND INFLUENCE How your business might use its influence	☐ Brand reputation and visibility ☐ Purchasing and buying power ☐ Convening and partnership capacity ☐ Influence within your sector or value chain ☐ Advocacy, public voice and leadership on key issues

FIGURE 30: CORE COMPETENCIES AND ASSETS CHECKLIST

PURPOSE IN PRACTICE

ABC Recycling and Modo – Identifying the Right Collaboration Partners

These stories highlight how businesses draw on their strengths, spot missing capabilities and engage the right partners to advance their social purpose, demonstrating a practical application of Step 3 and the value of network-level resources.

Social Purpose	Collaboration
 To preserve the world’s resources and strengthen the lives of our people and communities.	ABC Recycling collaborates with Indigenous communities and organizations such as the Indigenous Zero Waste Technical Advisory Group (IZWTAG) and the Major Appliance Recycling Roundtable (MARR) to develop metal recycling programs and training, and to jointly access funding. ABC Recycling’s collaboration with IZWTAG and MARR is a good example of leveraging business competencies and assets while addressing critical gaps through partnerships. By combining its own industry expertise and infrastructure with Indigenous knowledge and priorities, community-led cultural guidance and government support, the company is advancing its social purpose – preserving the world’s resources through accelerated metal recycling, while strengthening the lives of Indigenous peoples and communities through training, participation and shared value creation.
 To build a sustainable, inclusive future where shared vehicles strengthen communities.	Modo collaborated with TransLink, Evo car share and Mobi bike share to pilot and test the “RideLink Mobile App,” a multi-modal app that integrated various transportation services – public transit, car sharing and bike sharing – into a single, user-friendly platform. The collective goal was to encourage the use of multi-modal transportation, promote sustainable transportation choices and reduce reliance on personal vehicles. Modo leveraged its expertise and existing business relationships while addressing gaps in convening power and influence by collaborating with TransLink, Evo and Mobi to test the RideLink Mobile App. By integrating public transit, car sharing and bike sharing, this initiative promoted sustainable transportation choices and reduced reliance on personal vehicles – aligning with Modo’s purpose to build a sustainable, inclusive future where shared vehicles strengthen communities.

Step 4: Map the Ecosystem to Identify Interest Groups to Engage

In Step 3 potential partners were identified based on your organization's strengths and gaps. Step 4 expands this view to the broader ecosystem — revealing how interest groups and other actors connect, where influence sits and where collaboration has the greatest impact.

Here, you examine your ecosystem to see the full range of interest groups, relationships and influences connected to your purpose.

“Ecosystem mapping” can be done in different ways depending on your social purpose goal and context. The table below outlines three approaches, with varying levels of impact and complexity:

1. **Map your immediate business ecosystem** to activate your purpose through practical, low-risk actions.
2. **Extend your reach across the value chain** to scale impact through coordinated industry collaboration.

3. **Take a broader system perspective** to address root causes associated with your purpose and drive transformative, system-level change.

Each offers a practical way to work with others to move your purpose forward. Choose the approach – or combination of approaches – that fits your organization. Over time, you can expand your efforts, moving from working within your immediate relationships, to engaging your industry, to contributing to broader systems change.

These options reflect increasing scope and influence – from working within your immediate relationships to shaping broader system conditions.

There is no need to map everything at once – concentrate on what is most relevant to your purpose and build from there. Review the three approaches below with your team to identify where you are today and where you may want to expand your efforts over time.



SOCIAL PURPOSE ECOSYSTEM MAPPING: THREE APPROACHES

Mapping Approach	Business Ecosystem Mapping	Value Chain Mapping	Social Purpose Ecosystem Mapping
Stage of Practice	Foundational	Mature	Sophisticated
Scope	Local/ organizational/ community	Industry and value chain	System/society
Primary Focus	Immediate operating environment; existing relationships	Upstream and downstream leverage points across the value chain; industry dynamics	Root causes, system-level challenges and structural enablers (conditions that support change)
Typical Interest Groups	Customers, suppliers, community groups	Plus manufacturers, distributors, industry peers and competitors, industry associations	Plus policymakers, regulators, academics/researchers, NGOs, investors and financial institutions, ecosystem builders, cross-sector actors
Sphere of Influence	Within the organization's immediate relationships	Across the organization's value chain and industry relationships	Across the broader system and enabling environment
Strategic Value	Activate: Makes social purpose actionable within the organization's immediate sphere of influence; identifies practical, low-risk entry points; builds internal alignment and early momentum; strengthens existing relationships; enables experimentation, prototyping and early learning	Scale: Expands impact beyond the organization through value chain engagement; identifies leverage points across existing industry relations; improves coordination across value chain partners; builds credibility and legitimacy for the societal issue at the industry level; positions the business as an industry influencer	Transform: Targets root-causes and structural barriers; identifies system-level leverage points; enables coordinated multi- and cross-sector responses; influences the broader conditions that shape outcomes; positions the organization as a systems leader
Time Frame	One to two years	Three to four years	Five-plus years
Best For	Businesses beginning collaboration with others; piloting and testing interventions and solutions	Businesses seeking to amplify impact and influence across their industry	Businesses pursuing systems leadership and long-term, transformative impact

FIGURE 31: ECOSYSTEM MAPPING APPROACHES FOR SOCIAL PURPOSE COLLABORATION IN BUSINESS (COLLABORATIVELY DEVELOPED BY KAJZER MITCHELL AND CPER, 2026)

Approach 1: Business Ecosystem Mapping

Business ecosystem mapping focuses on your immediate operating environment and existing relationships, showing where your social purpose connects with your customers, suppliers and community groups. This approach activates your social purpose within your immediate sphere of influence, providing practical entry points for action and using these relationships to test, learn and build early momentum.

When to use this approach:

- To explore practical, low-risk entry points and pilot initiatives before committing to more complex collaborations.
- To activate existing relationships with customers, suppliers or community partners around a shared social purpose goal.
- Early in your social purpose journey, when a clear entry point is needed.

The following example illustrates how you can activate your social purpose within your immediate business ecosystem.

PURPOSE IN PRACTICE

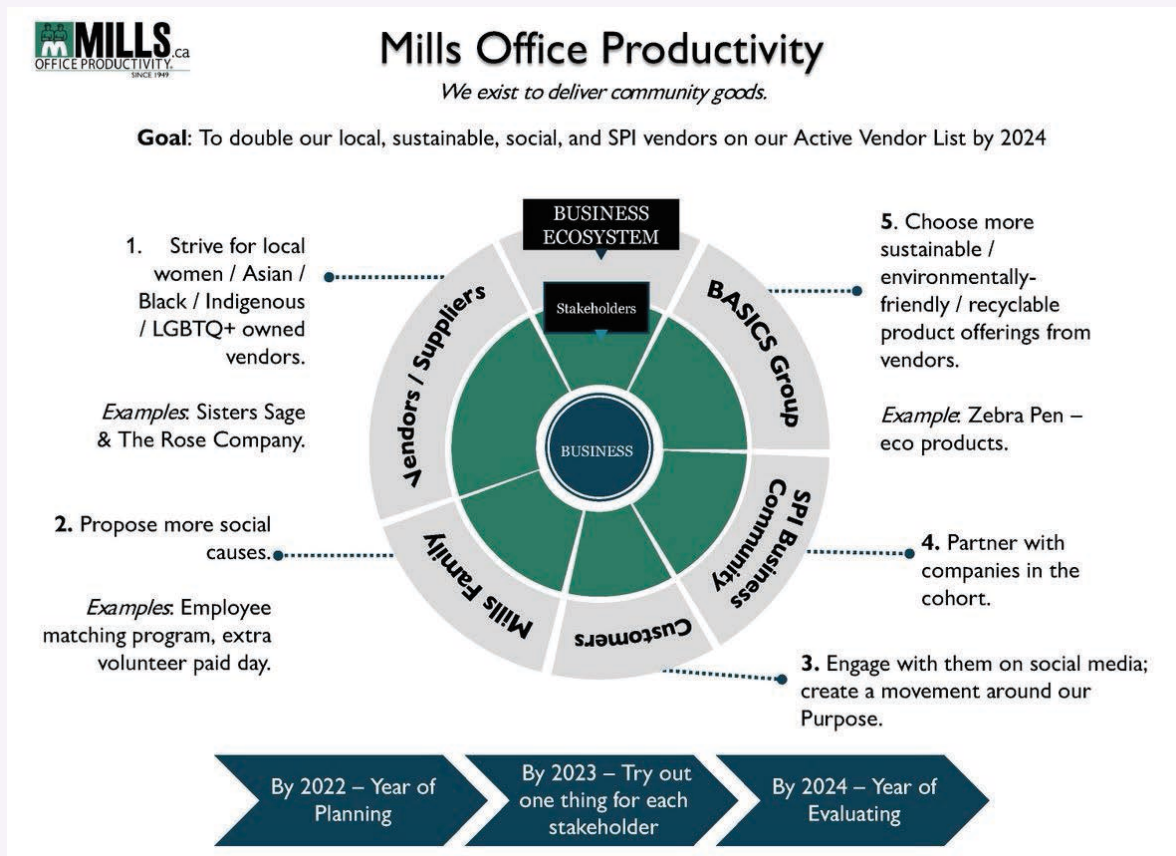
Mills Office Productivity – Business Ecosystem Mapping

Mills Office Productivity mapped its purpose across key parts of its business ecosystem – suppliers, customers, employees and community partners – and identified potential actions aligned with each group.

The graphic shows how collaboration can be approached incrementally, grounded in existing relationships and

practical actions. Rather than beginning with large formal partnerships, organizations can explore pilots, test ideas with different interest groups and build collaborations over time based on what they learn.

For more examples, see [Interest-Group Mapping Practices](#).



Approach 2: Value Chain Mapping

Many social purpose businesses seek to influence and mobilize their industry as allies in bringing their purpose to life. Doing so requires working across the value chain, including engaging manufacturers, distributors, industry peers and the industry associations that represent them.

The value chain comprises the full sequence of activities and relationships – from suppliers through production, distribution and customers – that bring your products and services to market. See the sample value chain map below.

Looking upstream and downstream within your value chain, you can determine where to collaborate with industry actors to influence, for example, sourcing practices, industry standards, customer behaviour, public policy or financial systems toward your social purpose. Value chain mapping clarifies where those efforts should be directed.

This approach enables you to scale your impact by engaging actors across the value chain, building credibility and legitimacy for the societal issue, and coordinating efforts.

When to use this approach:

- To pinpoint leverage points across the value chain where coordinated action could amplify impact.
- When advancing your social purpose requires changes in how value is created and delivered across suppliers, manufacturers and your industry.
- To work with other actors to implement solutions that extend beyond your immediate relationships and shape industry practices.

When applying this approach, consider where these actors – suppliers, customers, industry peers and their industry associations – can address and amplify your purpose.

The following example illustrates how organizations scale their impact by engaging across the value chain. Hemlock Printers, a family-owned printing company, mapped its value chain and engaged key actors around its purpose. By leveraging industry expertise, supplier and customer relationships and NGO credibility, Hemlock Printers scales beyond company-level action to mobilize coordinated, industry-wide efforts. This demonstrates how value chain mapping reveals partners to strengthen scale, alignment and legitimacy for the social purpose issue.

Working this way positions your organization as an industry influencer.

PURPOSE IN PRACTICE

Hemlock Printers – Value Chain Mapping

Social Purpose: To create connections, build community, and inspire actions that safeguard the health of the world's forests.

Hemlock Printers collaborates with others to develop a scalable industry-wide ZERO 2.0 Carbon Neutral Printing program. Priority value chain interest groups include:

- Supply chain and distribution partners (paper mills, paper manufacturers and merchants, printing equipment manufacturer)
- Industry associations (the Canadian Printing Industry Association)
- Peer organizations (other printers)
- Customers

They are also partnering with non-profits:

- Environmental non-profit organizations (Canopy, WWF)

SAMPLE VALUE CHAIN MAP

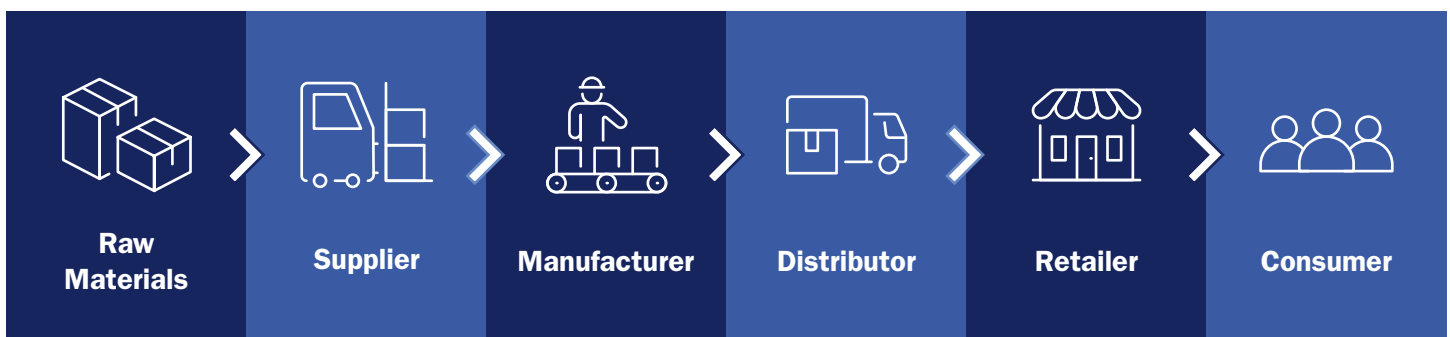


FIGURE 32: VALUE CHAIN MAP

Approach 3: Social Purpose Ecosystem Mapping

When your social purpose is directed at long-term, transformative change – targeting issues shaped by broader systems – social purpose ecosystem mapping traces who is influencing the societal issue your social purpose seeks to address and where to aim your efforts to make a difference at a larger scale.

Use an ecosystem map to step back and see the bigger picture. It allows you to look deeper into the system to understand the forces that affect your ability to deliver on your purpose, revealing opportunities to advance it and risks that could undermine it (see Figure 33 next page).

This approach shifts your attention from your local context and value chain to the wider system surrounding the issue. It explains how the issue is created and perpetuated, who influences it and where change is most likely to happen.

As you do this, look for what is causing the issue, what may be slowing progress and what could unlock solutions. This includes identifying underlying root causes and barriers that lock in the issue, and conditions – such as policy, infrastructure, funding or norms – that enable change and shift it.

Social purpose ecosystem mapping defines where to direct efforts, who to engage and system-level leverage points – where targeted actions drive meaningful change at a societal scale.

When to use this approach:

- Your social purpose goal can't be addressed without changes in the broader system.
- To identify system-level leverage points and direct your efforts where they matter most.
- Root causes of the issue require ecosystem-level solutions.
- Progress depends on others changing how they act or decide.
- To engage cross-sector actors to influence the broader conditions shaping the issue.
- You seek to shape system-level conditions and enabling environments to support long-term, transformative impact.

How to apply this approach:

Create your **social purpose ecosystem map** – a visual representation of interest groups and actors who:

- Affect or are affected by the societal issue your social purpose addresses.
- Influence root causes, challenges or conditions that enable change (directly or indirectly).
- Shape decisions and behaviours that impact progress.

To understand connections, ask:

- What roles do these actors play in this ecosystem?
- Whose decisions create obstacles to progress?
- Who can help address root causes, overcome barriers and shift the issue by changing what is driving it?

Use this approach to see how the system operates and where change might be possible. By mapping actors and their connections, you uncover key leverage points and hidden influencers. This brings into view who is shaping the issue, what is holding it in place – and what needs to change to shift it. **Working this way places your organization in the role of a systems leader.**

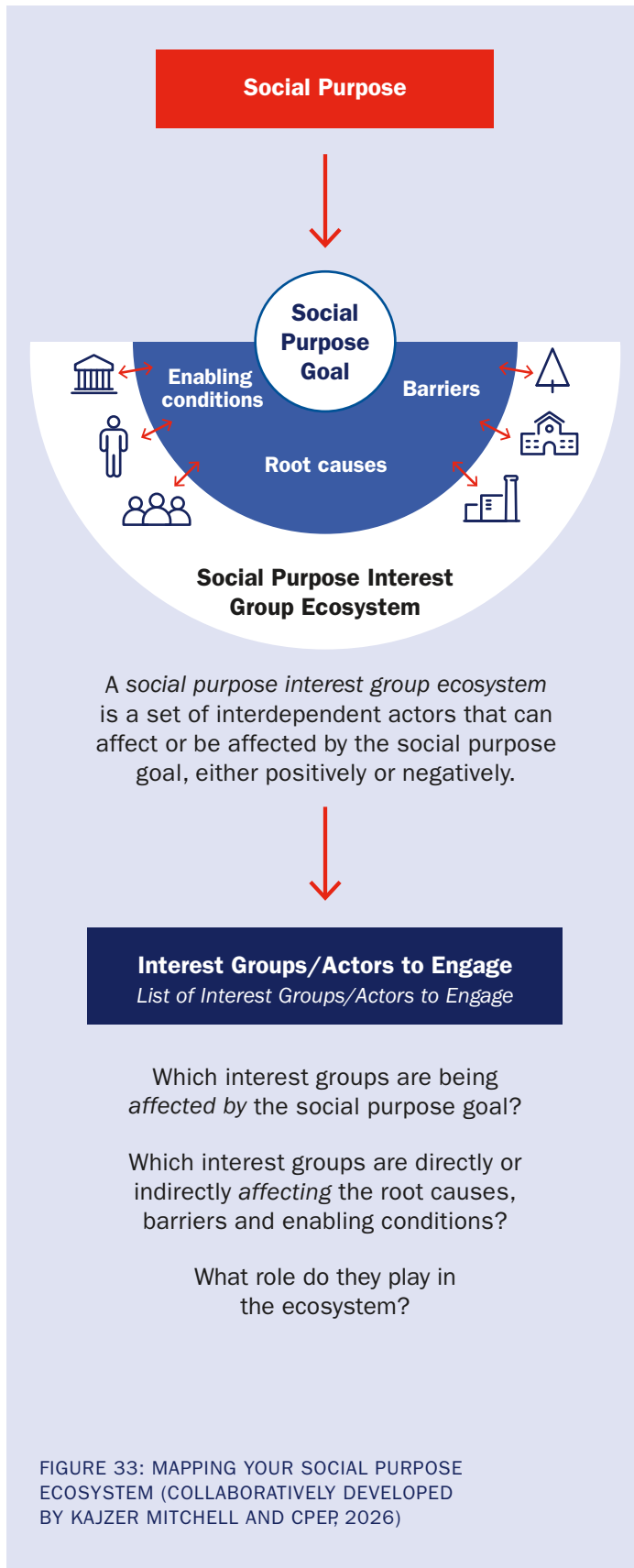
Review the Social Purpose Ecosystem Map on the next page to see a visual example of how this can be applied. Once completed, your map will identify a list of interest groups and actors to engage, preparing you for **Step 5: Prioritize Interest Groups and Actors to Engage.**

Social Purpose Risk and Opportunity Management

As you map the broader system, this guide identifies risks that could undermine your purpose and opportunities to strengthen it, so you can respond proactively.

[Enhancing Risk Management Practices: A How-to Guide for Social Purpose Companies](#)

SOCIAL PURPOSE ECOSYSTEM MAP



The Social Purpose Ecosystem Map on this page illustrates how organizations use ecosystem mapping to identify system-level leverage points and address root causes. The Co-operators example below shows this in practice.

Recognizing climate change as a threat to financial security, Co-operators, whose social purpose is “to provide financial security for Canadians and our communities,” mapped ecosystem actors influencing climate resilience. This revealed a key opportunity: partnering with competitor Gore Mutual Insurance, Social Innovation Canada and York University on the Climate & Equity Lab to co-develop solutions to strengthen approaches to climate risk and resilience that can be adopted across the industry.

This example shows how ecosystem mapping surfaces leverage points and reveals opportunities for collaboration among competitors and cross-sector partners to address systemic threats and amplify impact through policy advocacy and thought leadership.

Once you have reviewed the approaches and identified how you will map your ecosystem – using one or a combination of these three approaches – the next step is to determine whom to engage first. Not all interest groups need to be engaged at once. Prioritize where to start to direct your time and resources toward those best positioned to advance your social purpose.

PURPOSE IN PRACTICE

Co-operators – Social Purpose Ecosystem Mapping

Social Purpose: To provide financial security for Canadians and our communities.

Co-operators collaborates with Gore Mutual Insurance Company (competitor) as its partner in the Climate & Equity Lab to address climate challenges impacting Canada’s most vulnerable communities. Together, they are working to identify solutions that can be shared and leveraged across the insurance industry and society more broadly to strengthen Canada’s resilience against climate change.

“Solving complex problems requires collaborative, innovative solutions and interconnectivity across industries.”

– ROB WESSELING, PRESIDENT AND CEO, CO-OPERATORS

Step 5: Prioritize Interest Groups and Actors to Engage

With your ecosystem mapped, determine which interest groups to prioritize for engagement.

Here are six key criteria to help you prioritize (Figure 34):

Alignment:

1. **Values and purpose fit:** Do they align with your purpose and values?
2. **Trust and proximity:** Is there an existing relationship or shared history?

Influence and engagement:

3. **Degree of influence:** Consider the interest group's ability to influence the issue. Can it drive change, provide resources or open doors?
4. **Level of interest:** Are they actively engaged or willing to participate? Who is already advocating or mobilizing around related outcomes?

Strategic need:

5. **Essential for impact:** Will engaging this interest group meaningfully progress your purpose and objectives? For example, if customer buy-in or industry buy-in is critical, prioritizing their engagement is key.
6. **Diversity of perspectives:** Are different voices and lived experiences represented? You may need to look beyond your industry to bring in new perspectives to drive greater, long-term impact.

Avoid limiting collaboration to familiar partners. Purposeful collaborations thrive on diversity – different viewpoints spark innovation and uncover blind spots. Consider those who bring new or contrary viewpoints, resources or expertise. Avoid defaulting to organizations that only share the same perspectives or approaches.

Not all your interest groups need to be collaborators. Focus on identifying partners who can meaningfully help advance your social purpose in the markets and systems that matter most.

Potential partners include:

- **Value chain actors:** suppliers, customers, peers and competitors.
- **Industry bodies and peers:** associations, coalitions, standards bodies and other social purpose businesses.
- **Financial institutions and investors:** banks, investors, insurers and impact investors.

CRITERIA FOR PRIORITIZING INTEREST GROUPS

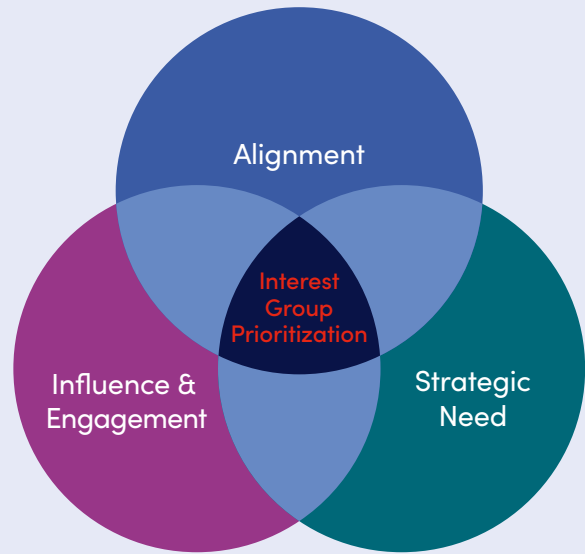


FIGURE 34: INTEREST-GROUP PRIORITIZATION CRITERIA (COLLABORATIVELY DEVELOPED BY KAJZER MITCHELL AND CPEP, 2025)

- **Knowledge and expertise partners:** NGOs, academics and think tanks.
- **Community insight partners:** community groups and institutions.
- **Public sector actors:** governments and Crown agencies.
- **Future players:** emerging markets and purpose-led startups.

If an ideal interest group doesn't exist for collaboration, consider founding a non-profit organization, charity or foundation to help you with your social purpose work. Maple Leaf Foods, for example, launched and founded the [Maple Leaf Centre for Food Security](#) as a registered charity. It collaborates across sectors to reduce food insecurity in Canada by 50% by 2030, through advocacy, policy reform, research and funding scalable programs. It operates independently with a board, including four external experts, chaired by a Maple Leaf executive.

Collaboration also includes encouraging other businesses in your ecosystem to adopt a social purpose themselves, helping build future collaborators and a stronger purpose-led economy.

Step 6. Assess Collaboration Readiness

Steps 1–5 establish the foundation for collaboration – selecting your social purpose goal, identifying partners, mapping your ecosystem to determine where collaboration has the greatest impact in advancing your purpose, and prioritizing who to engage.

Even when alignment appears strong, collaborations stall or fail if readiness is low, whether within your organization, among partners or across the broader ecosystem.

Assess your collaboration readiness where capacity may need strengthening before moving forward (see sidebar: Collaboration Readiness Checklist) to determine what kind of collaboration is feasible now, and where capacity may need strengthening before moving forward.

Gaps at any one of the three readiness levels (see sidebar) will limit what is possible through your collaboration.

To assess the maturity of an existing collaboration or identify advanced practices to build into a new one from the outset, see the [Intersectoral Collaboration Assessment Tool](#).

Phase 1 Outcomes

At the end of Phase 1, you should have:

- A clear collaboration goal and business rationale to guide action.
- A mapped ecosystem and insight into where collaboration can have the greatest impact.
- A list of prioritized interest groups to engage.
- A clear understanding of your readiness to collaborate and the gaps to address.

Indigenous Purpose in Action

Jack59 is an Indigenous-owned, B Corp-certified zero-waste haircare brand founded by Vanessa Marshall of Swan River First Nation and built on Indigenous teachings about land stewardship, holistic well-being and community care. The company produces plastic-free, vegan, cruelty-free shampoo and conditioner bars, preventing over one million plastic bottles from entering landfills, and uses compostable packaging rooted in environmental responsibility. Jack59 integrates reciprocity, cultural values and ethical employment practices, **sourcing from Indigenous suppliers and supporting community initiatives** while fostering a supportive workplace grounded in healing and sustainable living.

COLLABORATION READINESS CHECKLIST

Use this checklist to assess your readiness for collaboration and identify where to focus before or during your engagement. For each area, identify where you are ready to proceed and where gaps need to be addressed.

1. Internal readiness (your organization):

- ☐ Are your company's values and ways of working supportive of collaboration?
- ☐ Do you have the skills and leadership support to engage meaningfully?
- ☐ Are you open to learning, adapting and sharing power with others?
- ☐ Does someone have a clear mandate to commit the organization to collaboration?
- ☐ Have you allocated the necessary financial and human resources to support collaboration?
- ☐ Is there clear ownership and accountability for leading and managing the collaboration?

2. External readiness (priority partners):

- ☐ Are priority interest groups willing and able to engage beyond transactional relationships?
- ☐ Do they have the capacity and decision-making structures to support long-term purpose-led work?

3. Context readiness (the broader environment):

- ☐ Does the broader ecosystem currently support collaboration, experimentation and shared learning?
- ☐ Is there trust, shared language or infrastructure (e.g., intermediaries, labs)?
- ☐ Are there champions or conveners who can help coordinate collective efforts?

Note where gaps exist – these signal where to build capacity before or during collaboration.

Use your assessment to decide where to begin and what to strengthen. Address gaps by building internal capacity, strengthening relationships or supporting enabling conditions for collaboration.

Where readiness is low, begin with awareness-raising, relationship-building, shared learning or convening. As readiness increases, move toward co-creation, shared experimentation, greater coordination and collective action.

(Source: Collaboratively developed by Kajzer Mitchell and CPEP, 2025)

Phases 2–4: Initiate, Engage, Innovate and Evolve

The next three phases build momentum through engagement, co-creation and continuous improvement. With a clear collaboration goal, rationale, prioritized interest groups and a strong understanding of readiness, move from planning to action.

1 Prepare & Assess	2 Initiate & Engage	3 Innovate & Adapt	4 Evaluate & Evolve
- Identify Social Purpose Goal from Strategy - Agree on Business Rationale for Collaboration - Conduct Collaboration Gap & Opportunity Assessment - Map the Social Purpose Ecosystem - Prioritize Interest Groups/Actors to Engage - Assess Collaboration Readiness	- Reach out to Priority Interest Groups/Actors - Align on Collaboration Purpose & Scope - Design the Collaboration Structure & Governance - Establish Shared Goals & Metrics	- Co-create Solutions - Pilot & Test - Iterate & Refine	- Measure Purpose Impact - Strengthen & Sustain - Continuously Improve - Scale, Change or Sunset

Phase 2: Initiate and Engage

Phase 2: Initiate and Engage follows a clear four-step progression:

First, reach out to the priority interest groups and actors identified through Step 5 to build initial relationships.

- **Reach out to priority interest groups:** Initiate exploratory conversations grounded in listening, empathy and relationship-building. Seek to understand others' goals, perspectives and constraints.

Next, align everyone around the collaboration's shared purpose and scope through meaningful discussions.

- **Align on the shared goal and scope of the collaboration:** Explore whether there is a shared intent and alignment on the social purpose goal you are addressing. Clarify what progress looks like, what is within scope and where differences exist.

Then, design the collaboration's structure, governance, roles and responsibilities to ensure clarity and accountability.

- **Design the collaboration structure and governance:** Clarify roles, decision-making, accountability and the overall level of integration and shared resourcing across partners. Social purpose collaborations [exist along a spectrum](#) and governance approaches will vary depending on the level of integration – from lighter

structures (e.g., advisory groups, steering committees) to more formal shared decision-making models as collaborations become more long term and system-focused. Consider whether a neutral or backbone support organization to facilitate working together, such as a secretariat, is needed to coordinate efforts. Be prepared for governance to evolve as the collaboration develops over time. (See Tamarack Institute's tool on [Establishing Values and Principles for Working Together](#).)

Finally, establish shared goals and metrics so all parties understand what success looks like.

- **Establish shared goals and metrics:** In addition to your own organizational KPIs, agree on common outcomes and indicators that matter across partners and support learning and adaptation over time. (See [Tamarack Institute's resources on shared measurement](#).)

Phase 2 Outcomes

At the end of Phase 2, you should have:

- Trusted relationships established with priority interest groups.
- Shared purpose, scope, governance, roles and success metrics.
- Initial momentum through first conversations and alignment.

Phase 3: Innovate and Adapt

At this stage in your social purpose journey, engage your broader ecosystem to co-create innovative solutions to shared challenges. Social innovation approaches are particularly useful where challenges are complex, systemic or require experimentation and learning. Social innovation is not required for every organization or purpose. To learn more about applying social innovation methods to advance your purpose, see the [Corporate Social Innovation Guide](#). It provides practical guidance and tools for designing, testing and scaling collaborative solutions that accelerate progress toward long-term social purpose impact goals.

Social innovation is most relevant when:

- Progress depends on multiple actors changing together.
- Existing solutions are insufficient.
- New approaches demand testing and iteration.

Collaboration thrives on flexibility, not rigid plans. Co-create and test solutions, adapting as you learn from each iteration.

- **Experiment freely:** Pilot different approaches, embracing failure as an important part of the learning process.
- **Build momentum:** Reflect on results, refine and keep going – support a snowball effect through incremental wins.
- **Learn from all outcomes:** Analyze both failures (what to stop doing and avoid) and successes (what to institutionalize) to scale impact.

This phase turns experimentation into momentum. Interest groups join as they see progress, and each iteration strengthens your collaboration's capacity for systems change. See the sidebar to right for ideas on how to design a social innovation lab that you can adapt.

EXERCISE

Design a Social Innovation Lab

A social innovation lab is a structured, collaborative workshop designed to experiment with small-scale solutions to complex societal challenges. Social innovation labs are sometimes called design labs, change labs or living labs, but all serve as incubators for new ideas and approaches.

Use these questions to design a social innovation lab to advance your social purpose:

- What problem or opportunity are you addressing?
- What would you want to learn or test through the lab?
- Who will you invite to participate in the lab and why?
- What outcomes would signal success?
- How will this lab advance your social purpose in practical ways?

Social innovation labs do not need to be large scale. To keep it feasible, ask yourself: What is the smallest version you could run using existing relationships? Could it be embedded within current working groups or partnerships, or does it need to be hosted externally?

Phase 3 Outcomes

At the end of Phase 3, you should have:

- Pilots tested and iterated based on real-world learning.
- Incremental wins building interest-group commitment.
- Refined approach with failures analyzed and successes scaled.

What Makes Purpose Collaborations Work

- **Small actions can scale.** Purpose-led businesses often start with pilot projects or local partnerships that grow into broader influence across industries and communities.
- **Collaboration includes and extends beyond the value chain.** Effective purpose collaborations engage not only suppliers and customers, but also non-profits, researchers, governments, peers and even competitors to test ideas, share learning and co-create solutions.
- **Internal alignment strengthens partnerships.** Organizations with a clear social purpose, visible leadership commitment, engaged employees and systems of accountability are better positioned to build trust and sustain mutually beneficial collaborations.

Source: Royal Roads University and CPEP research on purpose-led collaboration

Phase 4: Evaluate and Evolve

After piloting and testing, **measure the impact** of the collaborative work – continuously assessing what’s working, what’s not and why. Use these insights to **strengthen and sustain** the collaboration so it remains relevant and impactful. As learning accumulates, adapt and improve the partnership, determining whether to **scale up, change or sunset** the initiative based on results and shared value.

As collaborations evolve, also pay attention to how partners and other interest groups experience your organization’s purpose in practice. Feedback on whether interest groups understand your purpose, see it reflected in your actions and believe the collaboration contributes to positive change provides insight into trust, alignment and the long-term strength of the relationship. Listening for these perspectives helps surface concerns early and address them before they affect the collaboration.

You can gather insight through short surveys, partner check-ins, debriefs or informal conversations. Establish a Partner Purpose Perception Score using the following statements. Ask respondents:

On a scale of 1 to 5, how true are the following statements?

- I understand this organization’s purpose and why it exists.
- I believe this organization acts consistently with its purpose.
- Working with this organization contributes to positive change.
- Working with this organization helps me achieve my goals.
- I would choose to continue collaborating with this organization because of its purpose.

These statements provide a starting point. See the full set in the [Purpose Perception Survey Toolkit](#).

Regularly monitoring both outcomes and perceptions ensures the **collaboration continues to deliver meaningful impact** and remains anchored in shared purpose.

For more detailed guidance on designing and managing business-led collaborations, see the [Business Led ESG Collaborations: How-to Guide for Business](#).

Phase 4 Outcomes

At the end of Phase 4, you should have:

- Impact measured (what works, what doesn’t, what needs to be changed and why).
- Collaboration strengthened or sunset decision made.
- Partner perceptions confirming trust, clarity and alignment.

Starting Small

Building social purpose collaborations doesn’t have to begin with large, complex, multi-interest group collaborations. Small, practical steps establish momentum and trust.

Here are some practical, low-barrier ways to initiate and grow collaborations:

- **Begin with existing relationships:** Engage trusted partners before expanding to new ones.
- **Use local networks:** Tap into community or regional connections to achieve early wins and build momentum.
- **Piggyback on existing industry efforts:** Avoid reinventing the wheel; join relevant existing initiatives already underway.
- **Elevate existing partnerships:** Transform transactional partnerships such as one-time donations or sponsorships into deeper collaborations. This requires moving beyond simple support to asking: What can we do together to drive long-term change? What shared goals or initiatives can we co-develop?

Starting small allows you to manage risk, demonstrate value and build trust over time. As your collaboration evolves, you can expand its scope, deepen relationships or adjust the level of coordination as needed – based on what will be most effective in advancing your social purpose.

“Old CSR collaborations would look like ‘let’s claim the brand space for ourselves.’ It was more self-serving, focused on positioning your organization as the leader rather than putting social impact at the centre. Now I’m thinking about how to engage other companies and organizations to join us; sharing the stage and making space for others so we can collectively deliver a much bigger impact.”

– MAUREEN YOUNG, VP, SOCIAL PURPOSE,
COAST CAPITAL SAVINGS

COLLABORATION APPROACHES BY ORGANIZATIONAL SIZE

Collaboration Dimension	Smaller Organizations	Larger Organizations
Structure	Ongoing relationships	Formal partnerships and joint ventures
Approach	Shared projects or pilots	Memorandums of understanding (MOUs)/programs
Leadership and Ownership	Owner- or manager-led	Dedicated staff
Time Horizon	Time-bound experiments	Multi-year

FIGURE 35: CHARACTERISTICS OF COLLABORATION BY ORGANIZATIONAL SIZE

Small Business Collaboration Quick-Start

Small businesses can pursue these actions to execute each Collaboration phase in under 10 hours total. Start with existing contacts; scale up as capacity grows.

Phase	Small Business Action
Prepare/Assess	Pick one goal; call one trusted partner.
Initiate/Engage	Coffee chat; agree on one shared metric.
Innovate/Adapt	Test one idea in 30 days.
Evaluate/Evolve	Quick yes/no: Renew?

PURPOSE IN PRACTICE

BCLC – Embedding Social Purpose Collaboration in Governance and Strategy

BC Lottery Corporation (BCLC) provides an example of how a purpose-led organization can embed collaboration into its governance, strategy and performance management systems to advance its social purpose.

BCLC's board adopted a **Stakeholder Governance Framework**, establishing a program to identify the stakeholders the organization relies on for the success of both its business and its social purpose. For each priority stakeholder group, BCLC is developing engagement plans that explicitly consider opportunities to collaborate in advancing shared purpose-related goals.

This approach is reflected in one of the organization's five strategic goals, **Meaningful Relationships**: *to be the most sought-after employer and partner for the shared value and social good we create together*. Collaboration is therefore positioned not as an adjunct activity, but as a strategic capability tied to purpose and long-term value creation.

To support accountability, BCLC includes **Meaningful Relationships KPIs** within its enterprise dashboard, tracking stakeholder satisfaction and levels of social purpose engagement. This enables the organization to monitor how effectively collaboration is contributing to both relationship strength and purpose outcomes.

Indigenous Purpose in Action

NUQO Modular is an Indigenous-owned, women-led modular construction company founded by Rory Richards of the shíshálh Nation. The company designs and delivers award-winning modular housing, childcare facilities and community infrastructure across Canada.

NUQO specializes in high-quality modular buildings manufactured in Canada and **designed to serve First Nations, public institutions and underserved communities**. The company combines modular construction with culturally informed design, focusing on durable, efficient infrastructure that supports long-term community well-being.

As a women-led company operating in a traditionally male-dominated industry, NUQO prioritizes gender equity in leadership, employment and opportunity across its workforce and partnerships. NUQO is a Certified B Corp, Certified Indigenous Business and Living Wage Employer.

Through close collaboration with First Nations governments, housing providers and public sector partners, NUQO advances practical infrastructure solutions while strengthening Indigenous participation in Canada's construction and manufacturing sectors.



Advance Purpose Through Public Policy and Advocacy

As collaborations mature, extend your impact by engaging in public policy and public dialogue related to your purpose. Participate in industry or multi-interest group policy forums, advocate for regulations that support your social purpose goals, take public stands on issues connected to your purpose and ensure you do not support lobbying or associations whose positions conflict with your purpose. These activities amplify the impact of your collaborations and help shape the broader enabling conditions needed for your purpose to succeed. See the IKEA example in the sidebar.

Five Critical Success Factors for Shaping Social Purpose Collaborations

Five key success factors will help you build and sustain social purpose collaborations:

1. **Clarify the business case:** Before jumping into a collaboration, ensure it supports your purpose and business priorities.
2. **Embed in leadership and strategy:** Treat collaboration as a core business function, not a side project. Ensure leadership is actively engaged and accountable for driving collaboration initiatives.
3. **Design for shared value:** The best social purpose collaborations benefit all parties involved. Look for ways to create value and foster mutually beneficial relationships.
4. **Commit long term:** Social purpose collaborations often take time to build and yield results, so be prepared to invest and evolve over a three- to five-year horizon to achieve meaningful outcomes.
5. **Cultivate a collaboration culture:** Build collaborative capacity internally to enable collaboration externally. Foster a culture that is open to learning, adapting and sharing power with others.

By starting where you are, leveraging what you have and building collaborations to further your social purpose, you create lasting impact while strengthening your business.

As your collaborations mature, your role can expand beyond advancing your own purpose to helping others adopt and embed social purpose – contributing to the broader Purpose Economy.

PURPOSE IN PRACTICE

IKEA Canada – Advancing Its Purpose Through Public Policy

In its 2026 federal pre-budget submission, **IKEA Canada** advocated for policies connected to affordability, circularity, housing, repair and reuse, waste reduction, accessibility and making homes more livable for Canadians.

The submission reflects IKEA's purpose “to create a better everyday life for the many people” and demonstrates how a company can advance its purpose through **public policy engagement and advocacy**.

As part of this work, IKEA engaged with members of Parliament; the Canadian Chamber of Commerce; Global Affairs Canada; Housing, Infrastructure and Communities Canada; and Environment and Climate Change Canada.

This example illustrates that purpose can be expressed not only through products, operations, philanthropy and reporting, but also through government relations and public policy positions.

Source: [IKEA Canada's 2026 Federal Pre-Budget Submission](#)

6.3 Advance the Purpose Economy

Social purpose businesses demonstrate leadership by extending their collaborations to **actively advance the broader Purpose Economy**. Leverage your influence to help other businesses adopt and embed social purpose – raise awareness, motivate peers and **drive the shift toward an economy where social purpose in business becomes mainstream**. Social purpose businesses that engage others on becoming purpose-led create a ripple effect, growing an economy where businesses contribute actively to creating a better world through their core business.

For additional ideas, see [Your Toolkit to Help Grow the Purpose Economy: How Social Purpose Businesses Encourage Others to Adopt a Social Purpose](#).

Advancing the Purpose Economy delivers these four business benefits:

1. **Builds values-aligned partners:** Encouraging other businesses to align with your social purpose helps create a network of like-minded partners. This leads to stronger collaboration, more innovation and a sense of community.
2. **Generates growth opportunities:** A network built on shared values leads to more referrals, clients and customers. You'll find that businesses with similar goals are more likely to connect you with opportunities that align with your purpose.
3. **Deepens loyalty and advocacy:** When suppliers and customers see your commitment to social purpose, it builds trust and advocacy. These stronger relationships support long-term collaboration and mutual success.
4. **Strengthens your social purpose brand:** Encouraging others to join the Purpose Economy strengthens your brand and enhances your reputation as a leader. Being seen as a champion for social purpose will set you apart in your industry.

How Your Business Can Advance the Purpose Economy

Play a catalytic role in advancing social purpose in your business ecosystem and broader network – from simple actions like raising awareness to influential efforts that rally your entire sector toward purpose.

Raise awareness by starting with visibility: Showcase your social purpose externally through your brand, website, reports, communications, email signatures, onsite signage, packaging and other everyday touchpoints. This helps your ecosystem understand your social purpose and sparks interest in how you put it into practice.

Share stories, internally and externally, of business customers and suppliers who embody your purpose: Highlight impactful examples of how your purpose shows up across your value chain. These stories show how social purpose comes to life in practice and encourage wider participation.

Use this visibility and storytelling to engage:

Engage customers, suppliers, business partners and industry peers to build shared understanding and collective momentum around social purpose.

Engage Your Value Chain in Becoming Purpose-Led

- **Engage business clients and customers** by hosting webinars or networking events on social purpose and its benefits.
- **Educate suppliers** through meetings and/or workshops about social purpose and its business value.
- **Integrate social purpose into supplier reviews and RFPs** by asking suppliers to share their purpose statements with you.
- **Offer to share your experience** by speaking on purpose at your industry events.
- **Encourage your industry or professional association** to adopt a social purpose itself and embed social purpose into member education.

See [Sample Association Social Purpose Statements](#) for examples of social purposes adopted by industry and professional associations.

See also [Accelerating Social Purpose Business Through Professional Associations: Case Study](#) for a practical example of how a professional association can embed social purpose across its education, conferences, publications, awards and member services – and help accelerate the Purpose Economy.

Scale Your Impact

Set more ambitious goals to help shift your broader industry ecosystem toward purpose, for example:

- **Engage your association** in exploring how your entire sector or profession could become a force for good, with all members adopting social purpose statements and bringing them to life through collective action. The Canadian Standards Association developed the [ESG and Social Purpose Guide for Associations](#) to support associations through this process. (Click “View Access” for a complimentary copy then go to Section 4.3.10, Purpose Practices.)
- **Develop a plan** requiring your suppliers to have a public purpose statement as a condition of doing business with you. Check out this [Social Purpose Procurement Toolkit](#) for some ideas.
- **Encourage your teams** to advocate for social purpose education within their associations, including training, competency models, industry standards and designations.

Here is an example of how social purpose board members at Family Enterprise Canada are engaging their association on social purpose: [Accelerating Social Purpose Business Through Associations: Case Study](#).

The Social Purpose Professional

Advancing the Purpose Economy is not limited to senior leaders or formal roles. Individuals across the organization often drive this by championing purpose in their day-to-day work and professional networks.

A [Social Purpose Professional](#) actively advances purpose within their function, organization and broader network. They act as **social purpose ambassadors** – helping translate purpose into practice across teams, projects, partners and external networks.

These professionals serve as **multipliers** – helping your organization live its purpose while also supporting others in your ecosystem to understand and adopt a purpose orientation.

A Social Purpose Professional:

- Embeds purpose into departmental functions and everyday decisions.
- Mobilizes peers inside and outside the organization to adopt or elevate purpose practices.
- Acts as a voice for purpose in industry and professional associations, supplier networks and community partnerships.
- Models purpose-centred leadership.

For companies seeking to lead in advancing the Purpose Economy, encouraging and equipping Social Purpose Professionals can be a practical and high-impact lever.

See the Coast Capital example on page 131 for an illustration of how one organization is encouraging more businesses to adopt a social purpose and contribute to growing the Purpose Economy.

National Purpose in Business Week

Each year, social purpose businesses celebrate purpose-led business by participating in Purpose in Business Week, held in the third week of November.

Using hashtags **#PurposeinBusinessWeek** or **#PIBW**, participating organizations share their purpose stories and practices – helping raise the profile of purpose in business more broadly through collective visibility and celebration.

Contact [CPEP](#) for a link to the Purpose in Business Week Amplification Kit, which offers simple ways to participate and help amplify purpose in business.

Join the Purpose Economy Movement

Advancing the Purpose Economy is not an abstract idea or an added responsibility – it is a practical, collective shift in how business operates, aligning the power of commerce with the long-term well-being of people and our shared environment. Every organization that adopts and lives a clear social purpose helps normalize a purpose-first mindset, accelerating a future where businesses exist to contribute meaningfully to people, communities and the world.

This is, ultimately, how social purpose becomes mainstream. The Canadian Purpose Economy Project exists to support and accelerate this shift. Our 2030 vision is for 25% of Canadian businesses to clearly define, embed and act on a social purpose – the tipping point where purpose-led business becomes business as usual and delivers social and environmental progress at scale.

You can play a role in growing the movement in many ways:

- Stay connected by subscribing to the [CPEP newsletter](#) and following us on [LinkedIn](#) to learn from emerging practices, tools and leading examples. Encourage your colleagues and networks to do the same.
- Invite others by encouraging colleagues, suppliers, customers and peers to explore social purpose and join the conversation.
- Signal your commitment by signing the [Call to Purpose](#) (at right) and inviting others in your organization and network to add their voices to a growing movement for purpose-led business.
- Deepen your engagement by participating in conferences, learning forums and peer exchanges hosted by our partner [Greater Purpose](#), which convenes leaders and practitioners working to embed purpose in real-world business contexts.

Growing the Purpose Economy means changing mindsets, norms and expectations – from profit-first to purpose-led and profit-enabled. Every conversation you start, every example you share and every organization you influence helps move business in that direction.

This is how change scales.

This is how business becomes a force for good.

Add Your Voice to the Call for Purpose

Hundreds of prominent Canadian CEOs and others have signalled their support for the Purpose Economy through the Canadian Purpose Economy Project's [Call to Purpose](#).

Join them – and invite your colleagues and networks to sign as well. This is how the Purpose Economy becomes a movement.



CASE STUDY

Coast Capital – Growing the Purpose Economy

Coast Capital treats **growing the Purpose Economy** as a deliberate extension of its social purpose, not a side activity. It is committed to encouraging other businesses to adopt, embed and disclose a social purpose – recognizing that a thriving Purpose Economy is built through the widespread adoption of social purpose across business.

Clear Goal and Metrics

Coast Capital has adopted a long-term Purpose Economy goal: **2030 Purpose Economy Goal**: “People and businesses in Canada have purposeful work and workplaces.”

Progress is tracked using both outcome and output metrics, including: “The number of businesses that have adopted, implemented or collaborated on a social purpose through Coast Capital’s partnerships.” This elevates Purpose Economy advancement to the level of the organization’s other strategic priorities.

Sponsorship and Leadership in the Purpose Ecosystem

Coast Capital is a **founding sponsor** of the Canadian Purpose Economy Project, supporting its mandate to help social purpose businesses start, thrive and grow. Through this sponsorship, Coast Capital has helped leverage additional financial and in-kind support for the broader purpose ecosystem.

Its engagement includes:

- Sponsoring CPEP gatherings that convene purpose-led businesses.
- Early adoption of the [Call to Purpose](#) to spur more Canadian businesses to articulate and embed a social purpose.
- Co-commissioning research into [purpose disclosures](#), helping establish credible expectations for how companies report on purpose.

These actions demonstrate how a company can use sponsorship and thought leadership to strengthen the infrastructure of the Purpose Economy itself.

Building Capability Through Business Networks

Coast Capital also focuses on **education and capacity-building** as a way to normalize social purpose across business communities.

- **BC Chamber of Commerce Social Purpose Course:** Coast Capital was the presenting sponsor of the [Building Your Social Purpose Business on-demand course](#). The course provides practical guidance on how to adopt and implement a social purpose for businesses of any size or geography.
- **Credit Union Sector Engagement:** Coast Capital actively encourages its credit union peers to adopt social purpose, positioning it as a natural evolution for a sector rooted in community well-being.
- **Business School Engagement:** Coast Capital sponsored Corporate Knight’s specialized look into [social purpose within business schools](#) as part of its annual **Better World MBA rankings** to evaluate how MBA programs teach the social purpose business model.
- **Thought Leadership Engagement:** Coast Capital regularly seeks out and shares its perspective on the business imperative for purpose at conferences and business schools, and within the impact business community (e.g., B Corp and Social Venture Institute).

Strategic Integration

This approach shows that Purpose Economy leadership can be intentional, measurable and woven into partnerships, sponsorships and sector influence – transforming advocacy from ad hoc efforts into core business practice.

The following resources provide practical tools, case studies and examples to help you extend your purpose beyond your organization by strengthening customer relationships, engaging interest groups, building collaborations and contributing to the broader Purpose Economy.

Resources

Tools and Guides

[Social Purpose External Communications](#)

[Social Purpose Customer Lifecycle](#)

[Customer Social Purpose Lifecycle Roadmap](#)

[Purpose Perception Survey Toolkit](#)

[Marketing on Purpose](#)

[Interest-Group Mapping Practices](#)

[Enhancing Risk Management Practices:
A How-to Guide for Social Purpose Companies](#)

[Social Purpose and ESG Collaboration Toolkit](#)

[Your Toolkit to Help Grow the Purpose Economy](#)

[Purpose Points of View](#)

[The Social Purpose Professional](#)

[Social Purpose Procurement Toolkit](#)

[Intersectoral Collaboration Assessment Tool](#)

[Corporate Social Innovation Guide](#)

Case Studies

[Accelerating Social Purpose Business
Through Associations: Case Study](#)

[Social Purpose Association Case Study:
BC Chamber of Commerce](#)

[Purpose Pays: How Intrepid Travel Turns
Purpose into Performance](#)

Videos

[Building Partnerships and Amplifying Your
Purpose Message and Impact](#)

[How Companies Collaborate to Advance
Purpose: Case Studies](#)

Tips for Success

- Build internal proof points before making social purpose visible to customers or partners.
- Offer simple ways for customers to participate in your purpose, such as story-sharing, volunteering or joint action.
- Start collaborations with one or two trusted, existing relationships to build momentum and credibility.
- Design collaborations to create shared value, not just reputational benefit.
- Inspire peers in your industry to embrace social purpose through events and how-to resources.

Moving to Step 7: Report

With your customers engaged, social purpose collaborations underway and contributions to the Purpose Economy taking shape, you're ready to move to **Step 7: Report**. This step focuses on monitoring your progress, communicating your results and using what you learn to strengthen your social purpose over time.

PHASE 2

Social Purpose Progress

Use the [Social Purpose Assessment Tool](#) to assess your current state. By completing **Step 6 (Collaborate)**, you are advancing progress on the following practices:

Governance and Leadership (Practice 14): Purpose Innovation: Purpose is a key factor in our innovation and R&D processes; we collaborate with third parties to pilot and scale purpose-centric innovations.

Customer Experience and Marketing (Practice 32): Purpose Visibility to Customers: Our purpose is visible to customers at all touch points.

Customer Experience and Marketing (Practice 33): Purpose Value Proposition: Our purpose is a key reason why customers choose to do business with us, and we have evidence to support this.

Customer Experience and Marketing (Practice 34): Purpose in Brand and Marketing: We have reflected our purpose in our brand DNA, value proposition, and marketing strategies and tactics. We tell stories that authentically share our purpose journey.

Customer Experience and Marketing (Practice 35): Customer Purpose Understanding: Our customers understand and value our purpose and how we make a difference.

Customer Experience and Marketing (Practice 36): Customer Purpose Engagement: We have created a variety of ways to engage our customers in helping us achieve our purpose, fostering a community that actively advances it.

Business Ecosystem (Practice 39): Purpose Collaboration: We collaborate with interest groups on shared goals related to our purpose (e.g., suppliers, industry peers and competitors, local businesses in our markets, business customers, non-profits, academic institutions, governments, industry associations).

Business Ecosystem (Practice 40): Supplier Purpose Awareness: Our suppliers and business partners understand and value our purpose and regard it as a key reason why they do business with us, with evidence to support this.

Business Ecosystem (Practice 41): Supplier Purpose Engagement: We actively engage and support our suppliers and business partners in helping us achieve our purpose.

Business Ecosystem (Practice 42): Industry Purpose Collaboration: We collaborate within our industry to advance our purpose and collective interests.

Business Ecosystem (Practice 43): Purpose Economy Expansion: We encourage and support businesses in our larger business ecosystem to become social purpose organizations to foster their success, create future collaborators and grow the Purpose Economy.

Business Ecosystem (Practice 44): Purpose Advocacy: We advocate for public policies that advance our purpose and the broader Purpose Economy and encourage others to do the same. We do not belong to organizations whose advocacy or positions are inconsistent with our purpose.

Business Ecosystem (Practice 45): Purpose Positions: We have taken public stands on our purpose.

Business Ecosystem (Practice 46): Purpose Thought Leadership: We contribute to thought leadership that advances our purpose or the Purpose Economy.

Download the full [Social Purpose Assessment Tool](#) to baseline your progress and set five-year ambitions.



Reporting, Learning and Improving

With social purpose embedded in governance, strategy, culture and operations – and external interest groups engaged – shift your focus to monitoring progress and credible reporting.

This section covers **Step 7** of the **Social Purpose Roadmap**: how to measure, communicate and refine your efforts on a regular basis.

Step 7: Report

Step 7 focuses on **reporting, learning and improving** by monitoring and measuring progress, communicating performance credibly and strengthening your social purpose. Begin with what is most relevant and manageable for your organization and go at your own pace.

Reporting is not a final step. It is how organizations **learn from implementation, take stock of progress and continuously improve how purpose is embedded across the business and its relationships**.

7.1 Regularly Review Purpose Performance

Regularly review your **purpose performance** to keep your organization accountable, surface areas for improvement and keep purpose efforts on track.

With your social purpose goals, targets and metrics integrated into your corporate strategy and/or business plan, the leadership team and board (if applicable) will regularly review social purpose performance as part of the organization's strategy or business plan monitoring processes.

The Social Purpose Implementation Plan operates at a more detailed level, setting out how social purpose is being embedded across the organization. This plan should be reviewed just as regularly by the Social Purpose Steering Committee and the organization's highest governing body to monitor progress on purpose integration.

Step 7 At a Glance

- Regularly review purpose performance.
- Implement ongoing purpose storytelling and communications.
- Update website and marketing strategy.
- Establish social purpose data collection and management.
- Disclose purpose progress through annual report.

Focus these reviews on:

- Progress against purpose-specific goals and KPIs in the strategy or business plan.
- How purpose shows up in decisions, priorities and behaviours.
- Where initiatives and practices are showing uptake among employees, customers and partners.
- Where gaps remain, momentum has slowed or progress has stalled.

This is an important moment to revisit the [Social Purpose Assessment](#) to take a structured, organization-wide view of how well your purpose is being integrated in practice. Reapplying the assessment helps confirm your current level of maturity, identify gaps or uneven progress across the business, and surface priority opportunities for the next phase of integration.

You may also choose to conduct periodic **internal or third-party audits** of your purpose integration to gain deeper insight, strengthen learning and support continuous improvement. These reviews provide an independent perspective on how consistently purpose is shaping decisions, practices and outcomes – and can surface blind spots that routine strategy and implementation reviews may miss.

Apply continuous improvement by:

- Taking stock of what you have achieved.
- Acknowledging progress.
- Evaluating what has gained the most traction with staff, customers and other interest groups.
- Identifying and addressing remaining gaps or barriers.

Update Your Strategy and Social Purpose Implementation Plan

Use these insights to refine your social purpose objectives and metrics in your corporate strategy or business plan and in your Social Purpose Implementation Plan and overall integration approach.

Celebrating progress matters. Calling out what is gaining traction – however small – helps reinforce effective practices, builds confidence and creates momentum for improvement.

Start Thinking About Measurement Early

Although reporting is addressed in this final step, a good practice is to identify potential indicators and proof points earlier in your implementation journey.

As you advance your social purpose – whether through integration initiatives, collaborations or existing impact efforts – pause to ask:

- What would success look like here?
- What evidence would demonstrate progress?
- What is our starting point today?

Where possible, establish simple baselines before launching new initiatives or expanding existing ones. A clear starting point makes it easier to see shifts, demonstrate gains and show the difference your purpose efforts are making, while enabling early storytelling.

Review the Purpose Statement

From time to time, organizations should step back to test the ongoing relevance of their purpose. Typically, every five years – or sooner if circumstances materially change – this reflection should consider:

- Is this still our purpose?
- Has our purpose evolved in any way?
- Should our goals, targets or KPIs reflect this change?

Any such reflection should be deliberate and well-governed, with changes to the purpose approved by the organization's highest governing body. See the Canada Goose example on the next page for an illustration of how a purpose statement can be updated to reflect changes in business direction.

In addition to formal monitoring, assessment and audits, structured reflection provides insight into how purpose is showing up in the organization.



Use the [Review Social Purpose Progress](#) worksheet to support internal sense-checking, creating space for employees and leaders to reflect on whether purpose is visible, credible and influencing day-to-day decisions and behaviours – and to surface where changes may be needed.

Internal reflection provides an important starting point. To **test how purpose is experienced beyond the organization**, the next task is to gather perspectives from external interest groups. This helps assess whether your purpose is being experienced as intended, and where perceptions, expectations or impacts may not be fully aligned.

PURPOSE IN PRACTICE

Canada Goose – Evolves Its Purpose as Its Business Evolves

As companies expand into new products, categories and customer contexts, their original purpose language can sometimes constrain innovation rather than guide it.

For example, **Canada Goose**, a performance luxury outerwear brand and public company, recognized this as it evolved beyond its roots in extreme-cold outerwear into a global lifestyle brand. Its earlier purpose – “**keeping the planet cold and the people on it warm**” – was powerful when focused on winter apparel but became limiting across broader markets and cultures.

In 2026, Canada Goose adopted a new purpose: “**To embolden explorers and preserve the planet they roam.**” The revised purpose broadens the company’s strategic scope while remaining true to its heritage. “Explorers” is intentionally inclusive, encompassing not only polar adventurers but also everyday urban explorers, while “the planet they roam” expands the company’s environmental commitment beyond climate change to the broader stewardship of the natural world. The new purpose provides greater flexibility to support future products, markets and innovations while preserving the company’s distinctive identity.

Gather Interest-Group Perspectives

Talk with your top interest groups – employees, customers, community partners, peers, suppliers or investors – about their experience of your organization’s purpose and collaborative efforts.

Ask:

- How do you experience our purpose in practice?
- Are there areas where our purpose – or how we act on it – should be strengthened or adapted?
- Where do you see opportunities to deepen collaboration on shared social purpose goals?

Test whether your organization lives purpose credibly, signals it consistently and is perceived authentically.

Learning activities may include:

- Periodic staff discussions to understand whether people feel proud of how the organization is living its purpose, and to identify barriers to implementation.



See [Review Social Purpose Progress](#) worksheet.

- Leadership or Social Purpose Steering Committee reflections on whether purpose influences everyday decisions.
- Interest-group conversations to understand impact, credibility and opportunities for improvement and collaboration.

The goal is not perfection in your social purpose, but learning – understanding how it is experienced in practice, what reinforces it and where it may be unintentionally undermined. This insight helps strengthen purpose delivery and inform continuous improvement.

Use what you learn to:

- Refine goals, targets and metrics.
- Strengthen high-impact initiatives and adjust or discontinue low-value activities.
- Update your Social Purpose Implementation Plan, corporate strategy or business plan.
- Communicate updates to staff and interest groups.
- Identify any additional collaborators or partners.

If you have not yet engaged in co-created or collaborative social purpose initiatives, this may be a good time to begin experimenting.

7.2 Implement Ongoing Purpose Storytelling and Communications

This was addressed earlier in the toolkit, but bears repeating. It is important to regularly share stories that bring your purpose to life. This builds trust, engagement and credibility, both internally and externally. Purpose storytelling helps demonstrate what purpose looks like in action, and together with your broader communications strategy, supports credible, engaging purpose communications that build believability and drive impact.

7.3 Update Website and Marketing Strategy

Ensure your website and marketing strategy remain up to date and accurately reflect how your social purpose shows up in your business. Social purpose will evolve, including how it is communicated and how it creates value for your business.

Check to ensure:

- Your purpose statement and narrative are current and consistent across channels.
- Purpose is clearly linked to your products, services and value proposition.
- Claims about purpose are supported by evidence, examples or results.

7.4 Establish Social Purpose Data Collection and Management

Put systems in place to collect, track and manage social purpose data. This provides the foundation for credible decision-making, learning and disclosure over time. This may include:

- Identifying a small set of priority purpose metrics.
- Assigning accountability for data collection and quality.
- Integrating purpose data into existing business reporting or dashboards.

Start where you are and build gradually — data maturity grows as your purpose work evolves.



7.5 Disclose Purpose Progress

Publishing your purpose progress builds transparency and trust. Whether through an annual report, a standalone purpose report or a webpage with regular updates, communicating progress helps demonstrate accountability and avoid **purpose-washing** (claims about purpose that are not supported by evidence or practice). Purpose disclosures should be grounded in the data and insights you are already collecting and reviewing as part of your purpose implementation and performance management.

Organizations are encouraged to use the Canadian Purpose Economy Project's purpose disclosure resources – particularly the [Disclosing With Purpose: Guidance for Preparers and Users of Purpose Disclosures](#) and [Purpose Disclosure Worksheet](#) – when reporting on their purpose progress.

Many organizations already report using established global reporting standards, which do not yet provide clear guidance on purpose disclosure. The purpose disclosure guidance fills this gap as a supplementary resource, supporting clearer, more meaningful purpose disclosure while also helping organizations identify areas for improvement and strengthen purpose integration over time.

Disclosing With Purpose Guidance

The [Disclosing With Purpose: Guidance for Preparers and Users of Purpose Disclosure](#) outlines what interest groups need to understand about an organization's purpose, how it is governed and embedded and how it creates and drives value – supporting clear, non-superficial disclosure and stronger accountability.

The guidance is organized around key disclosure areas that, taken together, provide a complete and coherent picture of how purpose is executed and operationalized, including:

- **Purpose meaning and development:** How the organization's purpose was defined, approved and refined.
- **Business model and prospects:** How purpose supports commercial success and shapes relationships across the value chain.
- **Strategy, culture and people:** How purpose is embedded in strategic goals, objectives, targets, culture and human resource practices.

- **Governance and accountability:** How purpose oversight is reflected in board responsibilities (if applicable), leadership roles and executive objectives or incentives.
- **Risks and opportunities:** The key risks and opportunities associated with pursuing the organization's purpose and how they are managed.
- **Measurement and impact:** How the organization measures purpose performance and the outcomes or impacts generated.

Purpose Disclosure Worksheet

The [Purpose Disclosure Worksheet](#) supports the purpose disclosure guidance by providing a practical tool to help organizations identify what to report and where reporting gaps exist.

It includes the disclosure elements, disclosure objectives, and illustrative qualitative and quantitative examples from the guidance, along with a working space to capture disclosure responses, note remediation gaps, set a remediation timeline and assess compliance.

This tool helps organizations gather and organize purpose information for reporting, identify reporting gaps and plan their reporting timeline. It also supports audit readiness or third-party assurance of purpose disclosures. Your Social Purpose Steering Committee can also use it to track purpose progress, support internal communications and drive continuous improvement.

The worksheet enables organizations to self-assess and communicate their level of **purpose disclosure maturity** – whether foundational (beginning), maturing or sophisticated.

Organizations approach purpose reporting in different ways. Some may publish a **standalone purpose report**, while others may integrate purpose disclosures into an **annual report** or other corporate reporting. Regardless of format, the worksheet supports the use of a **Purpose Disclosure Index**, helping readers easily locate and understand purpose-related information.

PURPOSE IN PRACTICE

Purpose Disclosure Examples

These public, private and co-operative companies are formally reporting on their purpose progress to avoid purpose-washing, demonstrate authenticity and show how purpose is being implemented, measured and advanced within their organizations. For a deeper look at their disclosure practices, see [Purpose Disclosure Best Practice Case Studies](#). They illustrate different ways companies are drawing on the purpose disclosure guidance in their reporting. See the next page for practical steps to disclose your own purpose progress.

Armour Valve

Armour Valve, a small family-owned industrial business, used the purpose disclosure guidance to inform its purpose disclosures in its combined purpose and sustainability report in 2024 and 2025. The reports show how purpose is embedded across functional areas, include a **purpose theory of change**, outline actions taken and planned, and include a **Purpose Disclosure Index** to support transparency and accountability.

[Armour Valve Purpose & Sustainability Report](#)

Co-operators

Co-operators, a national insurance and financial services co-operative, includes comprehensive purpose-related disclosures within its integrated reporting, informed by the purpose disclosure guidance. Its disclosures include a **purpose materiality assessment**, a **purpose theory of change** and long-term purpose goals linked to strategy and risk management.

[Co-operators Integrated Annual Report](#)

Coast Capital Savings

Coast Capital, a national financial co-operative, used the purpose disclosure guidance to structure its reporting and includes a **Purpose Disclosure Index** to help readers locate key information. Its 2024 and 2025 Purpose Impact Reports set out a clear **purpose theory of change**, a long-term **2030 purpose goal** and performance measures linking purpose to strategy, risk and impact. Notably, Coast Capital also includes information on how it is working to accelerate the Purpose Economy.

[Coast Capital Savings Purpose Impact Report](#)

TELUS

TELUS, a global communications technology company, was the first publicly traded company in the world to use the purpose disclosure guidance, including purpose disclosures in both its 2026 Information Circular and 2025 Sustainability and ESG Report. TELUS includes a **Purpose Disclosure Index** to help readers locate key purpose-related information across its disclosures. Its reporting also demonstrates **how purpose drives commercial success** and long-term value creation, linking purpose to innovation, investment, stakeholder outcomes and business performance.

[TELUS Sustainability and ESG Report](#)

Concert Properties

Concert Properties, a Canadian real estate company, used the purpose disclosure guidance as a reference document for its ESG Report. As a recent adopter of a social purpose, the company's purpose disclosures illustrate how **purpose can be integrated into ESG reporting in the early stages of implementation**.

[Concert Properties ESG Report](#)

Disclose Your Purpose Progress

You don't need a long report or perfect data to disclose your purpose. Start small, be clear and build from there.

Seven Simple Steps to Get Started

- 1. Pick where to share:** Decide whether to use your website, a short report or your annual update.
- 2. Review the [purpose disclosure guidance](#):** Use it as a reference for what to cover – not a checklist to complete all at once.
- 3. Fill in the [Purpose Disclosure Worksheet](#):** Note what you already do well and where information is missing.
- 4. Focus on what matters most:** Prioritize the disclosures that are most relevant to your business and interest groups.
- 5. Use what you already have:** Draw from existing plans, goals, stories, metrics and decisions – no new systems required.
- 6. Be honest and specific:** Share what you're doing, what you're learning and what you plan to improve next.
- 7. Publish and learn:** Share your progress, invite feedback and use it to strengthen your purpose.



The following resources provide practical tools, guidance, case studies and examples to help you disclose your purpose clearly and credibly, strengthen accountability and transparency and continue improving your social purpose over time.

Resources

Tools and Guides

[Disclosing With Purpose: Guidance for Preparers and Users of Purpose Disclosures](#) (purpose disclosure guidance)

[Purpose Disclosure Worksheet](#)

[How Risk and Internal Audit Operate in Social Purpose Companies](#)

[Enhancing Risk Management Practices: A How-to Guide for Social Purpose Companies](#)

Case Study

[Purpose Disclosure Best Practice Case Studies](#)

Video

[Building Partnerships and Amplifying Your Purpose Message and Impact](#)

Tips for Success

- Review and discuss purpose quarterly with your leadership and board (if applicable) to assess progress and course-correct early.
- Ask interest groups how your purpose shows up – and where it could go further.
- Start simple data collection: pick three to five priority metrics and integrate them into existing dashboards.
- Publish progress transparently using the [purpose disclosure guidance](#) and [Purpose Disclosure Worksheet](#) to build trust.
- Use what you learn to update goals, targets and actions for the next planning cycle.

PHASE 2

Social Purpose Progress

Use the [Social Purpose Assessment Tool](#) to assess your current state. By completing **Step 7 (Report)**, you've made measurable progress on:

Monitoring and Reporting (Practice 47): Purpose Data: Information systems are in place to gather purpose-related data to inform innovation, decisions and reporting.

Monitoring and Reporting (Practice 48): Purpose Insights and Feedback: We maintain a regular channel for unfiltered insights from external interest groups and experts, informing leadership on gaps and opportunities to advance our purpose.

Monitoring and Reporting (Practice 49): Continuous Purpose Improvement: We have evaluated our success in advancing our purpose and are implementing continuous improvement measures to address gaps and accelerate opportunities.

Monitoring and Reporting (Practice 50): Purpose Disclosures: We measure and regularly report to interest groups on our results and progress toward our purpose, including through the use of purpose disclosure guidance where appropriate, and actively use interest-group feedback to refine and improve how we deliver on our purpose over time.

Download the full [Social Purpose Assessment Tool](#) to baseline your progress and set five-year ambitions.



Living Your Social Purpose

Defining a social purpose is a milestone. Living it is how you drive impact, grow and put the world on a path to a better future.

You have moved from clarifying why your organization exists to embedding your purpose into governance, leadership, culture, decisions, products, partnerships and accountability.

The journey continues. Social purpose is strengthened through consistent application – in everyday choices, in moments of trade-off and in how the organization responds to change.

Progress rarely follows a straight line. You'll move faster in some areas than others. New opportunities will emerge; priorities will shift; lessons will be learned. What matters is not perfection, but persistence – using purpose as your steady reference point to guide decisions, focus effort and amplify impact.

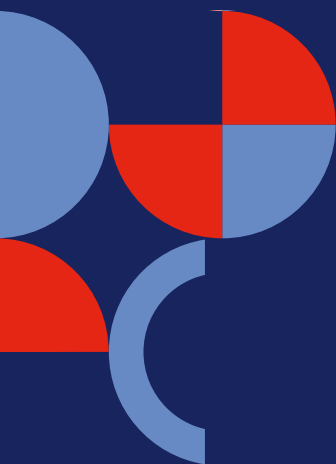
By bringing your purpose to life and mobilizing your enterprise's resources and relationships around it, you create impact in society and meaning in people's work.

As a role model, you help accelerate the transition to a Purpose Economy – encouraging other businesses to adopt and embed social purpose, making it mainstream in business and shaping an economy whose purpose is long-term well-being for all.

Advanced Guidance on Purpose-Driven Organizations

Organizations with mature social purpose practices may be interested in PAS 808 as a guide for deeper reflection on what it means to be a purpose-driven organization. **PAS 808: Purpose-Driven Organizations for Delivering Sustainability**, a Publicly Available Specification (PAS) developed by the British Standards Institution, addresses worldviews, principles and behaviours for governance of decisions that drive, and don't harm, collective long-term well-being.

The forthcoming international standard, **ISO 37011, Purpose-Driven Organizations – Guidance**, will extend this by providing guidance based on international consensus of current best practice in governing and operating a purpose-driven organization.



Social Purpose Resource Library

These resources equip you with ready-to-use tools, templates, guidance and proven examples to define, implement and strengthen your social purpose.

Core Concepts

- [Definition of a Social Purpose Business](#)
- [Social Purpose Continuum](#)
- [Business Case for Social Purpose](#)
- [Social Purpose Statement Criteria](#)
- [Purpose Points of View](#)
- [Introduction to Social Purpose](#)

Governance and Leadership

- [Purpose Governance Guidelines for Boards](#)
- [Purpose Governance Toolkit](#)
- [State of Purpose Governance Among the TSX 60 \(2026\)](#)
- [Social Purpose Steering Committee Guide](#)
- [A Guide to Executive Social Purpose Roles](#)
- [A Guide to Social Purpose Job Descriptions](#)
- [The Social Purpose Professional](#)

Strategy, Operations and Culture

- [Social Purpose Roadmap](#)
- [Social Purpose Values](#)
- [Social Purpose Decision Lens Tool](#)
- [Social Purpose Departments Checklist](#)
- [Social Purpose Process Metrics](#)
- [Social Purpose Impact Goals](#)
- [Employee Social Purpose Lifecycle Tool](#)
- [Social Purpose Performance Management Guide](#)

Products, Customers and Communications

- [Marketing on Purpose](#)
- [Purpose Perception Survey Toolkit](#)
- [Social Purpose CSR/ESG Transition](#)
- [Social Purpose Product Transition](#)
- [Social Purpose External Communications](#)
- [Social Purpose Customer Lifecycle](#)
- [Customer Social Purpose Lifecycle Roadmap](#)

Collaboration and Partnerships

- [Social Purpose Procurement Toolkit](#)
- [Social Purpose and ESG Collaboration Toolkit](#)
- [Intersectoral Collaboration Assessment Tool](#)
- [Interest-Group Mapping Practices](#)
- [Enhancing Risk Management Practices: A How-to Guide for Social Purpose Companies](#)
- [Accelerating Social Purpose Business Through Associations: Case Study](#)
- [Social Purpose Association Case Study: BC Chamber of Commerce](#)
- [Sample Association Social Purpose Statements](#)

Growing the Purpose Economy

- [Your Toolkit to Help Grow the Purpose Economy](#)

Disclosure and Reporting

- [Disclosing With Purpose: Guidance for Preparers and Users of Purpose Disclosures](#)
- [Purpose Disclosure Worksheet](#)
- [Purpose Disclosure Best Practice Case Studies](#)

Case Studies

Developing social purpose:

- [Return-It \(pdf\)](#) | [\(video\)](#)
- [LGM Financial Services \(pdf\)](#) | [\(video\)](#)
- [Hemlock Printers \(pdf\)](#) | [\(video\)](#)

Implementing social purpose:

- [Coast Capital](#)
- [Hemlock Printers](#)
- [Intrepid Travel](#)

ACKNOWLEDGEMENTS

The Social Purpose Toolkit builds upon foundational social purpose work developed in British Columbia over many years. In particular, it draws from early case studies, tools and practical resources created by **United Way BC** through its former *Social Purpose Institute*, which helped establish much of the original thinking and practice on social purpose that informed this field.

The toolkit further builds on the [Building Your Social Purpose Business](#) course offered by the **BC Chamber of Commerce**. Sincere thanks are extended to the BC Chamber of Commerce and to **Mary Ellen Schaafsma**, co-author of the course content and former *Director of the Social Purpose Institute*, and now *Founder and CEO of Purpose Pathways Consulting*, whose leadership helped shape the ideas reflected in this toolkit.

In addition, the toolkit draws on the **Social Purpose Collaboration Guide for Business: Advancing Purpose Through Collective Action and Influence** report developed by Royal Roads University in partnership with the Canadian Purpose Economy Project. This research was funded by the Social Sciences and Humanities Research Council of Canada Partnership Engage Grant. Dr. Ingrid Kajzer Mitchell, Associate Professor in the School of Business at Royal Roads University, is gratefully acknowledged for leading the research underpinning the collaboration guidelines and for her significant contribution to advancing understanding of how social purpose businesses collaborate to scale impact. The Canadian Purpose Economy Project supported this work through research collaboration and practical input.

Sincere thanks are extended to **Jenna Moore**, *Senior Manager, ESG and Sustainable Business Insights at the U.S.-based Chief Executives for Corporate Purpose*; **Phil Preston**, purpose strategist and author of *Connecting Profit with Purpose*; and **Carolyn Butler-Madden**, *Founder and Chief Purpose Activist of The Cause Effect*, and author of *Path to Purpose* and *For Love & Money*, leading voices on corporate purpose in Australia; and **Liz McBeth**, *CEO and President of Armour Valve Ltd.*, for their thoughtful review, feedback and insights, which strengthened the content and practical guidance reflected in this toolkit.

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. It convenes, connects, curates and collaborates to drive the social purpose business movement in Canada toward an economy where social purpose business is the norm, attracting capital, talent and partners. In this economy, businesses unlock all their assets, influence, reach and scale in collaboration with others to help Canada address its societal challenges and realize a flourishing future. We appreciate the ongoing support of Coast Capital, our Founding Purpose Champion, and operate as a project of the Canadian Business for Social Responsibility Education Foundation.

Visit our website at www.purposeeconomy.ca to register for updates, explore our purpose levers of change and join the social purpose business movement.

Help Us Improve This Toolkit

Have feedback, examples or resources to share? We welcome your ideas for strengthening future editions.

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