



Soul of the
Next Economy
Forum **2016**

September 30 - October 1, 2016 at Ambrose University, Calgary AB



Forum Notebook

Thank you to our sponsors and hosts for making Soul Forum possible!

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Welcome to the Soul of the Next Economy Forum 2016!



The Soul of the Next Economy Forum allows participants to engage and strategize with thought leaders on corporate social responsibility, an arena that is vital, yet often forgotten in a tough economic environment. I look forward to dynamic session discussions and encourage attendees to ask questions and take advantage of the opportunity for face-time with thought leaders.

We have continued to support the Forum because we believe this is an exciting opportunity to have Calgary's business leaders and potential leaders learn about social stewardship, effective community development and collaboration among different sectors and to address social and development issues locally and around the world. Over the next two days, I hope you are inspired by the knowledge shared and come away with the understanding that corporate social responsibility and triple bottom line practices don't impede business but rather enhance business outcomes.

Trevor Haynes
Chairman, President & CEO, Black Diamond Group

Forum Hosts



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FOUNDATION



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COMMUNITIES
CALGARY

Thank you U of C Haskayne's Hunter Centre for Entrepreneurship and Innovation, MRU's Institute for Community Prosperity and Calgary West Rotary Club for sponsoring student attendees. Thank you DIG Events for greening the Forum and DialogLoop for facilitating Forum feedback.

WELCOME



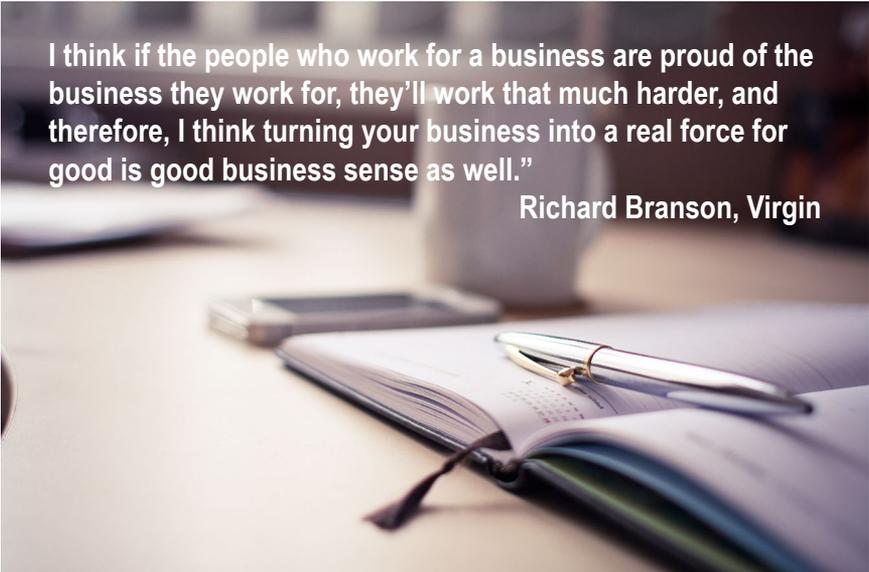
Welcome from BDC

BDC is Canada's only bank dedicated exclusively to entrepreneurs. We believe innovative, ambitious entrepreneurs play an essential role in creating sustainable prosperity in our communities. That's why we're delighted to sponsor and participate in this year's forum. We are the first Canadian financial institution to receive B Corp certification and we are excited to share our experience and insights about this global movement. B Corps (beneficial

corporations) are a force for good and real change in our society and we strongly support the movement. These companies are proving that business can be both profitable and have a positive social and environmental impact.

We look forward to discussing our approach to supporting social entrepreneurship, presenting a newly certified B Corp from Edmonton and taking part in an exchange of ideas and knowledge on how we can collectively help innovative businesses flourish for the benefit of us all. Enjoy the Forum!

Craig Ryan
Director of Corporate Social Responsibility
BDC (Business Development Bank of Canada)



I think if the people who work for a business are proud of the business they work for, they'll work that much harder, and therefore, I think turning your business into a real force for good is good business sense as well."

Richard Branson, Virgin

Thank you for participating in the Soul of the Next Economy Forum.



Vibrant Communities Calgary(VCC) is in its second year of guiding the implementation of Enough for All. VCC's participation in this opportunity reflects its role in poverty reduction in Calgary and Area. In its backbone role through a collective impact approach, VCC works together with multiple stakeholders to address the root causes of poverty in our city.

Increasingly we are becoming aware that an integral component of poverty reduction is doing business differently. It is a recognition that businesses and their employees meaningfully working together can achieve better results.

Although counter intuitive, we are beginning to understand the false dichotomy between a “good top line and bottom line.” It is completely possible for businesses to achieve a strong triple bottom line – social, environmental and financial. This happens over time and requires rethinking business models and pay structures.

The “Soul of the Next Economy” is one step on this journey. We are excited about the ideas that will be explored at this forum point towards a very conscious form of capitalism that enables businesses to look after all their stakeholders. Only when businesses adopt that mindset will they achieve true long-term sustainability.

Together we will transform the future of business and enhance the quality of life for all in the community. I look forward to learning and growing together over the next two days.

Franco Savoia, Executive Director
Vibrant Communities Calgary

We have to bring this world back to sanity and put the greater good ahead of self-interest.”

Paul Polman, Unilever

WELCOME

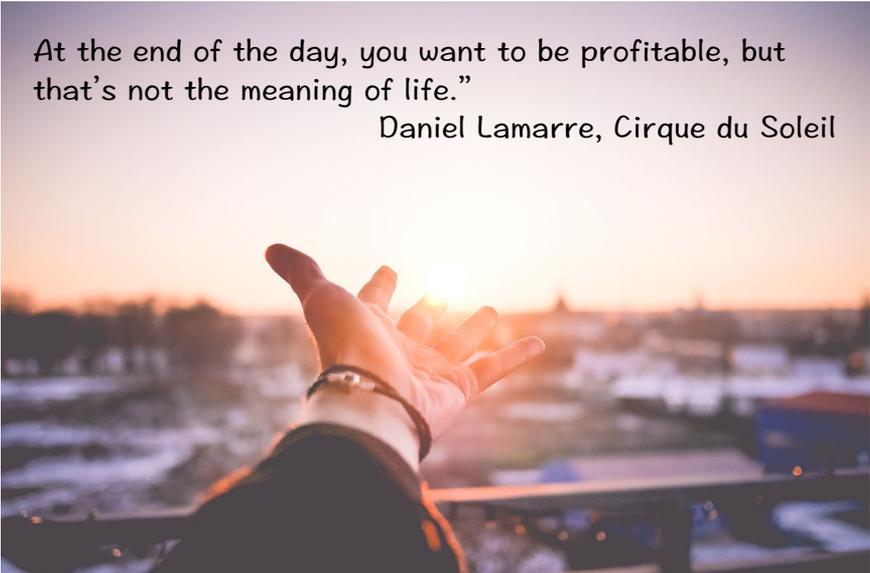


On behalf of the board of directors and all of the wonderful volunteers at the Fig Tree Foundation, I'd like to welcome you to the Soul of the Next Economy Forum 2016 Edition.

Since our inception over 10 years ago, the Fig Tree Foundation has encouraged collaboration and cooperation as means towards achieving our primary objective of "Catalyzing Great Development". The "Soul" Forum provides all of us the opportunity to participate in an open, honest and transparent dialogue with like minded stakeholders from all walks of life. By sharing each other's experiences we can all learn and grow regardless of our professional, educational or social backgrounds. We must all come together if we are going to solve (or even attempt to solve) some of the issues facing our world today.

I'm confident that this will be the best "Soul" Forum yet and I am truly grateful for your involvement and support!

Paul Gomes
Executive Director
Fig Tree Foundation

A photograph showing a hand reaching out towards a bright sunset over a city. The sun is low on the horizon, creating a warm, golden glow. The hand is in the foreground, with fingers slightly spread. The background shows a cityscape with buildings and lights, slightly blurred.

At the end of the day, you want to be profitable, but that's not the meaning of life."

Daniel Lamarre, Cirque du Soleil

Welcome to our third Soul of the Next Economy Forum!

We're excited to have you join us. Once again we have the opportunity to address the role of business in society. Since John Elkington coined the term, "triple bottom line," 22 years ago, business has taken an increasingly more proactive role as a partner with civil society and government to address societal challenges. The examples are many. Companies work in consultation with local partners so that philanthropic contributions benefit not only society but also achieve the firm's interests. In some countries, business leaders can work to shape a country's regulatory environment for the better. This raises standards and brings stability to the community, as well as being good for business.

What's particularly important is that this societal value isn't coming at a cost to the firm's economic objectives. As Suzanne West has said, this isn't about trade-offs. It's about the power of the "and." There is growing recognition that being environmentally and socially responsible provides companies with a distinct competitive advantage. Companies are achieving this by embedding these responsible practices throughout their entire organization and by working together with new types of partners.

This weekend is about exploring what these partnerships might look like in the years ahead. For the many students in attendance, what will their role look like? What about faith communities? These are some of the very questions that Ambrose University as a Christian university is examining through entities like the Canadian Poverty Institute and the Ambrose Business program. And of course, what will your role be?

Over the next two days, you'll have the chance to not only hear from others but to also lend your voice to the discussion. We look forward to hearing what you have to say.

Randy Poon
Associate Professor & Business Chair
Ambrose University



WELCOME

This has been a challenging year or so for Albertans – Fort Mac fires, new governments, continued economic uncertainty, changing government policies, global conflict and so on. Out of challenge though can come resilience and opportunity. As we have been organizing the Forum and interacting with all of the contributors, we have seen example upon example of innovation, collaboration and creativity in response to the challenges – along with continued commitment to social responsibility in the corporate sector.



Now we come together to:

- *learn* about local and global social and development issues
- *connect* with peers, industry experts and other sectors addressing these issues
- *engage* in sustainable business oriented solutions to these issues, fueled through innovation, collaboration and corporate social responsibility

Thank you for joining the conversation again this year on how we can come together from various sectors and work together to make Calgary and our world a better place.

Angie Redecopp
Forum Committee Chair
Ambrose University

As you begin your time at the Forum, please give some thought to what you hope to accomplish over the next day and a half...

Topics you would like to learn more about...

People or organizations you would like to connect with ...

Below is a basic overview of the Forum.
A detailed schedule is provided on the next page.

Friday Sept 30

12:30pm - 1:30pm	Registration & Exhibits
1:30pm - 5:00pm	Executive Roundtable with moderator Suzanne West & CSR in Focus with Phillip Haid & Helle Jorgensen
5:00pm - 6:00pm	Reception & Exhibits
6:00pm - 8:00pm	Film Screenings: <i>The Millennial Dream</i> & <i>Kombit: The Cooperative</i>

Saturday October 1

8:00am	Refreshments & Exhibits
8:30am - 9:30am	Plenary Solving Problems through Local Entrepreneurs with Yunus Social Business
9:45am - 10:45am	Break-out Session A
11:00am - 12:00pm	Break-out Session B
12:15pm - 2:00pm	Buffet Lunch, Exhibits, Networking & Forum Cafe
1:30pm - 3:00pm	Lion's Den Social Innovation Challenge
2:00pm - 3:00pm	Feature Session C
3:00pm - 3:30pm	Wrap-Up Plenary
3:30pm - 4:15pm	Networking & Exhibits

FORUM SCHEDULE

Friday Sept 30

12:30 - 1:30pm	Registration
1:30 - 5:00pm	Executive Roundtable with Suzanne West
5:00 - 6:00pm	Reception
6:00 - 8:00pm	Film Screenings - The Millennial Dream

Saturday Oct 1

8:00 - 8:30am	Refreshments		
8:30 - 9:30am	Plenary - Solving Social Problems Through Local		
	Airhart Room A1085-1	Airhart Room A1085-2	Room A2131
9:45 - 10:45am Break-out Session A	CSR Panel - Business with Purpose	The Impact of Impact Investing	What do Global SDGs Mean for Alberta Organizations?
11:00 - 12:00pm Break-out Session B	The Evolution of CSR: the B Corp Movement	Economic Development as a part of Community Development	Financial Inclusion & Development
12:15 - 2:00pm	Lion's Den contestants can join the Pitching Pit over lunch in Room A2210		Buffet Lunch,
2:00 - 3:00pm Feature Session C	Lion's Den Social Innovation Challenge (1:30pm - 3:00pm)		How Can Companies Succeed by Helping the World Not Fail?
3:00 - 3:30pm	Wrap - up		
3:30 - 4:15pm	Networking		

& Exhibits

& CSR in Focus with Phillip Haid & Helle Jorgensen

& Exhibits

& Kombit: The Cooperative

& Exhibits

Entrepreneurs with Yunus Social Business

Room A2133

Room A2141

Room A2210

Ensuring the
Future Prosperity of
Alberta

Collaboration is
Effective & Messy!

Using Strategic
Mapping to Drive
Toward Collective
Impact

Bridging the Gap
Between Aboriginal
& Mainstream
Businesses

Nothing About Us
Without Us!

Human Centered
Design for Social
Impact

Exhibits, Networking & Forum Cafe

First, Do No Harm

Plenary

& Exhibits



EXHIBITORS

A number of organizations are hosting exhibits throughout the Forum including:

ALBERTA'S PROMISE aims to help both children and youth by connecting organizations from different sectors to help create meaningful impact.

AMBROSE UNIVERSITY is a community of transformative Christian higher education – with a vision for the welfare of our city and our world.

BLACK DIAMOND GROUP LIMITED is one of North America's leading providers of modular workspace, remote accommodation and energy services providing innovative solutions using modular buildings, support equipment and surface rental assets.

BUSINESS DEVELOPMENT BANK OF CANADA

BDC is the only bank in Canada dedicated exclusively to entrepreneurs. They also support entrepreneurs who create certified Beneficial Corporations (B Corps), a new kind of company that uses the power of business to solve social and environmental problems - and a growing global movement. As Canada's only B Corp bank, they help grow the movement by lending to B Corp companies, as well as supporting grassroots organizations and capital market mechanisms designed for them.

CALGARY DREAM CENTRE is a faith-based recovery organization working to change the lives of those most vulnerable in our city. Their holistic process of transformation helps men, women and youth to escape the cycle of homelessness and addiction. Find out how the Calgary Dream Centre is changing lives of the homeless in Calgary, sign up to volunteer and/or donate!

CANADIAN POVERTY INSTITUTE has a mission of trying to reduce poverty through means of research and education.

ENERGY FOR ALL is an organization that has a passion for reducing energy poverty and creating sustainable solutions for those affected.

FAIR TRADE CALGARY is working to increase awareness and encourage availability of fair trade products in Calgary. They are

running a campaign to make Calgary Canada's next Fair Trade Town in 2016, which would show Calgary's leadership and commitment to ethical consumerism and social responsibility. They are part of Engineers Without Borders (EWB) Calgary.

FIG TREE FOUNDATION is a Calgary-based group dedicated to helping disadvantaged populations around the world by fostering collaboration between and raising funds for registered international development organizations.

IJM CANADA believes that justice for the poor is possible. IJM is a global organization that protects the poor from violence in developing countries. Their global team includes hundreds of lawyers, investigators, social workers, community activists and other professionals at work in nearly 20 communities.

MARDA LOOP FILM FESTIVAL presents some of the world's best documentaries on issues that are important to us as individuals, Canadians, global citizens and humans. Since their start in 2006, they have grown to an annual six-day festival in four venues and also present justREEL, a year-round film series.

MEDICAL MERCY CANADA (MMC) is a registered Canadian volunteer organization, which provides support to impoverished persons and refugees along the Burmese borders, Nepal and Ukraine.

OPPORTUNITY INTERNATIONAL provides access to savings, small business loans, insurance and training to 12 million people working their way out of poverty in the developing world. Clients in 28 countries use these financial services to expand businesses, provide for their families, create jobs for their neighbours and build a safety net for the future.

THE MUSTARD SEED exists to help meet the basic needs of shelter, food, clothing and acceptance for men and women experiencing poverty, and to work with them to find sustainable housing and employment.

VIBRANT COMMUNITIES CALGARY (VCC) is a non-profit organization that works collaboratively, with various stakeholders and partners, seeking to engage Calgarians and to advocate for long-term strategies that address the root causes of poverty in Calgary.

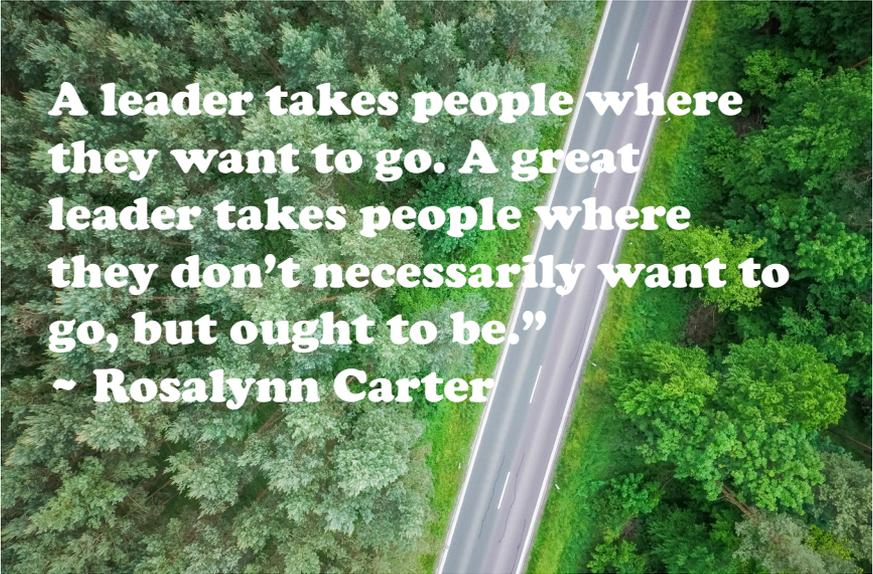
FORUM EMCEE



*Patti Dolan - Forum Emcee
Portfolio Manager
Dolan Wealth Management, Raymond James
Ltd.*

Patti has been in the investment industry for over 30 years and has practiced Responsible Investing (RI) since 1995 and is a portfolio manager for Dolan Wealth Management, Raymond James Ltd. Patti works with individuals, families, nonprofits and foundations in aligning their investments to their values.

Patti serves on the national Board of Directors for the Responsible Investment Association as Secretary. She is a board member of Vibrant Communities Calgary a nonprofit organization that advocates for long-term strategies that address the root causes of poverty in Calgary, University of Calgary Sustainable Investment Committee, a member of the Women's Executive Network and a proud member REAP Calgary a sustainable business organization.

An aerial photograph of a two-lane asphalt road winding through a dense forest of green trees. The road is the central focus, leading the eye from the bottom towards the top of the frame.

A leader takes people where they want to go. A great leader takes people where they don't necessarily want to go, but ought to be."

~ Rosalynn Carter

FOLLOW-UP ACTIONS

CSR ROUNDTABLE

Opening Event – CSR Roundtable

The CSR Roundtable brings together diverse leaders in the business community with non-profit sectors, government, indigenous communities and educational institutions to discuss corporate social responsibility and the role business has in enhancing communities both locally and globally.

Executive Roundtable: The CSR Roundtable will open with a moderated Executive Roundtable with Calgary and area business and community leaders hosting small groups of Forum delegates in roundtable discussions, inviting participants to engage in conversation around CSR topics of interest. These face-to-face discussions will encourage delegates to ask questions and share perspectives around key aspects of social responsibility, as well as hear from their table hosts. The Executive Roundtable concludes with a panel discussion among the moderator and some of the business leaders, summarizing key topics of discussion and notable take-a-ways.

CSR in Focus: We will take it to the next level as we focus on specific topics that are affecting Calgary businesses and the way they responsibly do business. We will be challenged by Phillip Haid from PUBLIC Inc. and then hear responses from Helle Bank Jorgensen of Global Compact Network in response.

THE CSR ROUNDTABLE IS BROUGHT TO YOU BY:

Calgary Chamber



BLACK DIAMOND

GROUP



*Suzanne West - President & CEO
Imaginea Energy*

A Fearless leader. A Visionary.

She is going to change the world. And she's going to do it by getting other people to change the world with her. Imaginea is her latest venture and one of five companies that, over the past 15 years, she has successfully built from scratch.

She spent her early days receiving an engineering degree from the University of Calgary, then spent the first 11 years of her career as a reservoir engineer and in various leadership positions in large corporations.

It doesn't end there – she has also been a fitness instructor for 21 years and participates in philanthropic projects that are very near to her heart; those that involve children, animals, and homelessness.

Her unparalleled wisdom, that only a brilliant and repeatedly successful entrepreneur can offer, has attracted a crack team break down the most daunting of barriers. To require the way we think about energy. To turn what we're doing into what we should be doing. Her latest passion, Imaginea, is to create a new kind of energy company that values all three of Planet, People, and Profits, equally. Essentially, to discover a better way of developing our resources and creating “AND” solutions and new possibilities to transform the energy industry into a force for good. Her truly laudable career has crystallized into an epiphany – that profits are not the nemesis of this planet, and the people on it. That oil doesn't have to be a dirty word. That change can happen, and it will because it's the smart thing to do.

And it's this vision, guided by her insight and astonishing ambitions, that unites our ranks and compels us to realize our great potential.

CSR ROUNDTABLE



*Phillip Haid - Co-Founder & CEO
PUBLIC INC.*

Phillip Haid co-founded PUBLIC in 2008 to disrupt the way companies, charities, governments and consumers/citizens think about public engagement and doing “good”. Driven by a passion to prove that profit and purpose must go hand in hand to generate large scale social impact, he set out to build a hybrid company – part agency/part social

innovation lab – that creates social impact through public engagement, fundraising, advocacy and volunteer engagement programs, campaigns, platforms and businesses. As CEO, he is responsible for overseeing the strategic and creative growth of the business. Phillip is a columnist for Fast Company, the Financial Post and Marketing, writing on “profitable good”. PUBLIC’s clients and partners include: CIBC, Under Armour, Maple Leaf Foods, Sun Life, Kruger, Indigo, Meridian Credit Union, Public Health Agency of Canada, Toronto Zoo, Rick Hansen Foundation, ParticipACTION, Canadian Diabetes Association, and Partners for Mental Health.

**THANK YOU TO ALL OUR
BUSINESS & COMMUNITY
LEADERS WHO HAVE MADE THE
CSR ROUNDTABLE POSSIBLE!**



*Helle Bank Jorgensen -
President
Global Compact Network
Canada*

Building on a background as a Business Lawyer and a State Authorized Public Accountant, Helle brings more than 25 years of experience advising global companies and investors within Corporate Responsibility and Reporting.

Helle has extensive experience providing strategic and operational guidance to all functions within an organization, including advising at the C-suite and board level. Helle was the creator of the world's first LCA-based environmental account, the world's first integrated report, and is the principal organizer for the CEO/Investor-network for Business Ethics and Non-Financial Reporting. She has led the CDP-report of the S&P 500 and Improvement of DJSI ranking and investor communication for global and US companies.

She has led PricewaterhouseCoopers's Sustainability and Climate Change practices in Europe and the US, hereof 11 years as a partner. Since 2012, she has run B. Accountability advising global business leaders in Sustainability and Climate Change. In 2013 she was also asked to build and lead the Global Compact Network Canada, and has over 3 years grown the number of signatories to nearly 100 Canadian companies. In 2014, Helle was chosen as one of 12 Global Facilitators for UN Global Compact Board Programme. She is a speaker and author of thought-leading articles and books and has served on multiple boards. In April 2015, Helle became the first in North America to have received the Certificate of Achievement and passed the GRI G4 Exam.

**“If you change the way you
look at things, the things
you look at change.”**

Wayne Dyer



The New Economy Roundtable

Do you believe in the power of your business to build a better community?

If you're passionate about shared value and inclusive business practices, join the New Economy Roundtable. The New Economy Roundtable is an initiative of the Canadian Poverty Institute at Ambrose University in partnership with the Ambrose University School of Business.

For more information, please contact PovertyInstitute@ambrose.edu



SUSTAINABLE DEVELOPMENT GOALS



Take action on the 2015 Sustainable Development Goals:

1. Join PWC Canada's Alberta SDG Initiative – facilitating discussion among non-profits, industry and government on collaboration and support for the SDGs in Alberta. Local thoughts at [linkedin.com/in/melwilsonpwc](https://www.linkedin.com/in/melwilsonpwc)
2. Join companies around the world on taking action on the SDGs. Use these guides available on-line: PWC's Navigating the SDGs: a business guide to engaging with the UN Global Goals and GRI/UN Global Compact's SDG Compass: the guide for business action on the SDGs.
3. Join Global Compact Network Canada – [globalcompact.ca](https://www.globalcompact.ca) – building the capacity of the Canadian corporate sector by facilitating dialogue, sharing best practices and peer-to-peer learning in order to make it easy for companies to embrace the SDGs and the 10 United Nations Global Compact Principles in their national and global operations.

International

#ENOUGHFORALL

DOING BUSINESS DIFFERENTLY

FOCUSING ON A STRONG BOTTOM LINE WITH SUSTAINABLE & EMPLOYEE-FRIENDLY POLICIES IS GOOD FOR BUSINESS!



WHY DOES IT MATTER?

As a business leader, you can combine your core competencies with the passion, expertise and caring of the non-profit sector and the resources of the government.

Together, we can ensure the success of the #EnoughForAll strategy while improving the performance of your business.



WHAT ARE THE BENEFITS?



- Improved business sustainability
- Increased employee retention
- Better bottom lines.
- Improved reputation.
- An improved quality of life for all.

HOW CAN YOU HELP?



- Be a champion by doing business differently with your peers and colleagues.
- Follow ethical procurement policies, be environmentally sustainable and enact employee-centred business policies
- Be a leader on #EnoughForAll projects like the Financial Empowerment Collaborative.



Local

FOLLOW-UP ACTIONS

Community Involvement Made Easy

By Karen Whiteman, Director at Alberta's Promise

While Alberta's small businesses know the importance of giving back, developing a strategic community involvement program can be daunting. The day-to-day demands of managing a business often leaves community involvement planning on the back-burner. But in a world where social responsibility is moving from buzzword to business necessity, small businesses can't afford to get left behind.

Community involvement, as defined by Alberta's Promise, is businesses giving time, money, goods, or services to build strong communities and a thriving economy. For instance, supporting educational programming for children

contributes to a better educated workforce, while enhancing community programs for families helps improve quality of life for consumers. The conclusion is simple: when approached strategically, community involvement improves both the health of communities and the business environment.

This fall, Alberta's Promise is launching a toolkit to help businesses give back and get ahead in Alberta. Titled *Creating a Community Involvement Program for your Small Business*, the step-by-step guide will be officially unveiled in time for Small Business Week in Calgary.

Request your digital copy of the toolkit via getstarted@albertaspromise.org or visit our booth at the Soul of the Next Economy Forum.



*The toolkit, *Creating a Community Involvement Program for your Small Business*, is a step-by-step guide to giving back in Alberta. This diagram provides a sneak peek into the toolkit launching this fall.*



**CALGARY
FOUNDATION**
FOR COMMUNITY, FOREVER

THE FOUNDATION.
of my community

starts with you and me - more than charity
it's the empathy i feel for the
people where i live.

close to home is where the heart is,
where help goes farthest
my foundation helps me start this

people standing tall
in towns big and small,
urban, rural, one and all.

My care comes through
helping those that can't make do,
or get by, or maybe
just need to fly... 

My foundation has roots across the land,
intertwining, hand-to-hand,

showing what we thousands banded
together can do, including you, making true
the endeavour
to make things better

for generations still,
their dreams fulfilled,

it all gets built ...

on THE FOUNDATION.

Canada's community foundations help communities where they need it the most, connecting people, families and companies with the causes that inspire them. Community makes you. You make your community.

BROUGHT TO
YOU BY THE

191

COMMUNITY
FOUNDATIONS
OF CANADA

communityfoundations.ca
calgaryfoundation.org

Kirby Redwood
Health & Wellness
Committee Volunteer
Calgary Foundation



FILM SCREENINGS

Meet the Filmmaker



As an entrepreneur, filmmaker, and community movement-maker, Greg Hemmings is a global thought leader in the area of positive social impact filmmaking. Greg's focus is on how companies can inspire positive change by investing in social impact films and at the same time, increasing brand trust in the market.

His commitment for positive social change has taken him and his team to all corners of the globe to tell global stories to inspire local change and local stories to inspire global change. His company Hemmings House is a certified B-Corporation and employs 12 full time change-

makers who feverishly produce filmed content that makes a difference. Hemmings House has been producing film content for the brand marketing and global broadcast industries for almost a decade. They have also created a process that engages social community and brand stakeholders in the film story experience helping to accelerate social movements that matter to them.

Their TV series' and documentaries have been sold to over 60 broadcasters around the world, and they have helped connect customers to brands with aligned values by helping tell authentic stories that build trust.

Greg is a member of the Order of the Wallace McCain Institute and a graduate of the Wallace McCain Institute's Entrepreneur Leadership Program. He has also furthered his training with the National Screen Institute for their Global Television Marketing Program in Winnipeg and Cannes France, as well as the North American Media Executive Leadership Program in Banff.

Greg has won multiple awards internationally and regionally including the prestigious Royal Common Wealth Society's Vision Film Award in London England. (See relevant awards and recognitions at the bottom)

Greg is also a mentor, public speaker, podcaster, writer, adventurer, musician...and most importantly a dad and husband.



Saturday, October 1

Rogério Oliviera

Social Business Entrepreneur, Co-Founder & Country Director at Yunus Social Business Brazil

Rogério will be speaking on solving social problems through local entrepreneurs during the Saturday morning plenary.

Yunus Social Business currently operates in seven countries and has supported over 500 entrepreneurs that have either secured or created over 3,000 jobs. To find out more about the impact this is having on various communities they are working with, visit their website.

Rogério has 14 years experience in leading teams in the areas of product development, innovation, sales & marketing, general management and start-ups implementation with companies such as BRMALLS, Warner Bros., Johnson & Johnson, and Nestle. He is also a specialist in the field of Happiness at Work and is the founder of Movimento Buena Onda – an organization that provides workshops, lectures, and consultancy for business schools and organizations (Walmart, Coca-Cola, Telmex, Johnson & Johnson, and more). Oliviera takes pride in mentoring others and is part of the due diligence team at Singularity University – a program that is supported by NASA and Google for creating entrepreneurs that hope to positively impact society. Rogério is a columnist at PEGN, the main entrepreneurship magazine in Brazil, and has an academic background in communication. He holds an MCA from HEC Montréal in Canada.

FOLLOW-UP ACTIONS

Aligning Investments to Values

Written by: Patti B. Dolan, CFP, CIWM, FSCI, RIAC, CIM Portfolio Manager, Dolan Wealth Management of Raymond James Ltd.

There has been a noticeable demand from foundations to align their investments to their mission statements and values. For example; environmental versus fossil fuel, human rights versus non fair trade investments, poverty reduction versus poor pay practices, religious morality versus pornography, alcohol, etc.

Foundations understand that the investments they make can influence environmental, social and governance issues. Foundations are using their conventional equity portfolios in ways that will reflect the values of the foundation. Methods being used are engagement, rather than divestment. The importance of influencing change when actively invested by employing fund managers that vote their proxies in accordance to the foundations values cannot be overstated.

Foundations have the ability to invest

patient capital, money that can be invested for a longer time frame to allow investments to mature. The longer periods strengthen their ability to deliver greater social, economic and environmental benefits.

Foundations have also become leaders in impact investing. They have taken a shared value approach where they can invest in local social enterprises that can bring a financial and social change or even resolve an issue they have been addressing in their community.

There have been many thought leaders in this area; The J.W. McConnell Family Foundation, Vancity Foundation, Trico Foundation have taken the lead in many areas of non-conventional investing. The days of just writing a cheque or issuing a grant is waning. Foundations are looking at achieving greater community benefits by investing in the community longer term. Investing in systemic change rather than enabling an ongoing problem.

Many family foundations are going through an intergenerational change-over. The baby boomers and millennials are engaging in dialogue around family values and the values of their foundations. Redefining investment policy statements (IPS) that reflect the family and foundation values are often a result of these conversations. The IPS may incorporate mission focused financial returns. This does not necessarily mean lower returns than the market, rather it allows investments to be held for the long term and may eliminate the short-term approach.

Community foundations run by corporations have also taken a new

approach to solving industry and community needs. Investing in education within a community to provide a skilled workforce, investing in low cost housing to enable employees' affordable housing. These are shared value approaches that benefit society rather than feel good investments such as one time donations.

values to advance their causes and to lead social change.

Patti Dolan is a Financial Advisor with Raymond James Ltd. The views of the author do not necessarily reflect those of Raymond James. This article is for information only. Raymond James Ltd. is a member of Canadian Investor Protection Fund.

Foundations now realize that they can have tremendous impact with their investment decisions by leveraging their

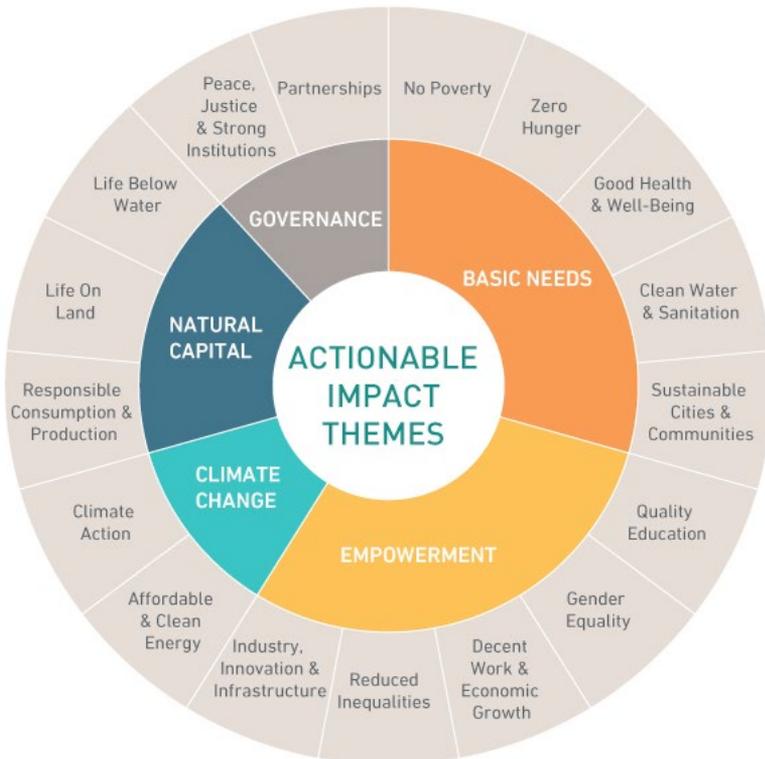
17 SDGs

applicable to a broad set of stakeholders



5 Actionable Impact Themes

applicable to a broad set of stakeholders



Source: MSCI ESG Research

BREAK-OUT SESSION A - 9:45AM



Using Strategic Mapping to Drive Toward Collective Impact

Panelists:

Jill Andres - Creating Value Inc. & MRU Institute for Community Prosperity

Sarelle Azuelos - Women's Centre Calgary

Blythe Butler - First 2000 Days Network

Janet Eremenko - Vibrant Communities Calgary

Join a community roundtable on a collective impact initiative directed at early learning & childcare as it relates to poverty reduction. Experience collective impact first hand and learn more about poverty reduction efforts in Calgary.



CSR Panel - Business with Purpose

Panelists:

Houston Peschl - Creating Eudaimonia (Moderator)

Randy Ferguson - Strategic Group

Carolyn Martin - Sponsor Energy

Harry Klukas - Black Diamond Group

Struggling economy, new governments, natural disasters, international conflict and other big changes. Why is NOW the time for Calgary businesses to engage in strategic and innovative social responsibility?

BREAK-OUT SESSION A - 9:45AM



What do the Global SDGs Mean for Alberta Organizations?

Panelists:

Mel Wilson - PWC Canada (Moderator)

Alexander MacWilliam - Denton's Canada

Katherine van Kooy - Calgary Chamber of Voluntary Organizations

Court Ellingson - Calgary Economic Development

What would it look like if Alberta were to formally adopt the United Nations sustainable development goals as a sustainability framework? Imagine government, non-profits and business all using the same framework to measure our social, environmental and economic performance.

PWC Canada is leading a series of roundtables on this in Alberta.

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For more information,
contact Mel Wilson at mel.wilson@ca.pwc.com

BREAK-OUT SESSION A - 9:45AM



Collaboration is Effective & Messy!

Panelists:

Diane Krecsy - Calgary Homeless Foundation (Moderator)

Chad Zelensky - Lowen's Skincare

Louisa Ferrel - True Buch Kombucha

Managing business in an economic downturn, ending poverty and ending homelessness are complex issues. There is lack of consensus and certainty in achieving intended results. It takes a broad cross-section of stakeholders to work together to achieve the agreed upon goals. Come to hear about some examples in business and social sector and learning in the process and share your experiences in Calgary and area.



The Impact of Impact Investing

Panelists:

Patti Dolan - Dolan Wealth Management (Moderator)

Lorraine Becker - Canadian Coalition for Green Finance

Stephanie Robertson - SiMPACT Strategy

Michael Robinson - University of Calgary

How do you measure the impact of the three pillars of responsible investing: Environment, Societal and Governance?

BREAK-OUT SESSION A - 9:45AM



Ensuring the Future Prosperity of Alberta

Panelists:

Matt Mayer - Conscious Brands (Moderator)

Daniel Clark - CSV Midstream Solutions Corp

Apoorv Sinha - TOHL

Dick Ebersohn - The City of Calgary

Luciano Dalla-Longa - Government of Alberta

This fishbowl-style discussion will invite the audience to join in the conversation with panelists from the Energy Futures Lab, a diverse group of leaders committed to transitioning to the energy system that the future requires. This session will explore pathways to securing a prosperous future for Alberta in a low carbon world.



DialogLoop can turn any presentation into a conversation by closing the gap between content and engagement. Thank you for helping us gather feedback on the Forum!

NOTES

FOLLOW-UP ACTIONS

FOLLOW-UP ACTIONS

Why sustainability leaders are supporting the SDGs, and why your organization should too

By Mel Wilson, PhD

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Whether we are talking about a company, a nonprofit, or a government, when it comes to sustainability management, an organization must focus on two things:

- sustainability performance, and
- sustainability communications

To be a leading sustainability organization you need to excel at both performance and communications.

Both require strategy, planning, resources, stakeholder engagement, and information, among other things. Leading sustainability organizations are the ones that have learned how to optimize their limited resources, and use generally accepted standards where possible. They frequently use management systems standards and industry standards to drive performance, and reporting standards such as the Global Reporting Initiative (GRI) to drive communications.

But very few of the current sustainability-related standards set specific goals and targets. They talk about the importance of goals and targets, and they provide guidance on assessing materiality and identifying the most relevant issues to the organization and its stakeholders, but goal and target setting is left up to the individual organization. This results in organizations working in different directions, along different timeframes, and sometimes at cross purposes. Opportunities for organizations to collaborate on shared goals are frequently missed.

The Role of the Sustainable

Development Goals (SDGs)

The SDGs and their associated targets play two very important roles:

- they provide a set of common goals and targets for all organizations - companies, nonprofits, and governments to collaborate on to improve their sustainability performance within their shared jurisdiction / region
- they provide a common language and vocabulary for discussing the issues and their performance and communicating with their stakeholders

This is illustrated in the diagram below.

Organizations that support and utilize the SDGs will improve their sustainability performance by setting reach goals and targets. They

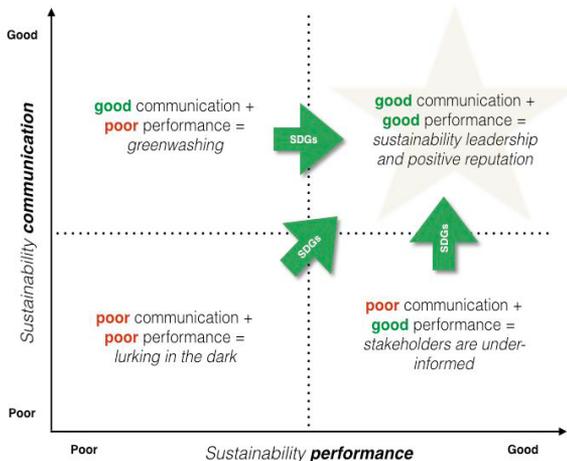
will improve their sustainability communications by using an internationally recognized vocabulary.

This will help them move into the upper right hand quadrant, the quadrant of sustainability leadership and positive reputation. This is the quadrant where organizations say what they do and do what they say, in a spirit of continuous improvement, and are respected for it. This is where leading organizations are, and where all organizations should strive to be.

So how will the SDGs help your organization, be it a company, a nonprofit, or a government? By providing common goals and language to help you improve your sustainability performance and communication.

This is what sustainability leadership is all about.

The SDGs will help drive improvements in sustainability **performance** and **communication** for companies, nonprofits, and governments





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BREAK-OUT SESSION B 11:00AM



The Evolution of CSR: The B Corp Movement

Craig Ryan - BDC

Tom Redl - Chandos Construction

Traditional CSR has failed to bring the systemic change we need. The rise of the B Corp movement— a new, more powerful and optimistic entrepreneurial movement— offers hope. Come learn about the B Corp certification and meet an inspiring, successful Albertan example!

Craig Ryan is Director of Corporate Social Responsibility at BDC, the only bank in Canada dedicated exclusively to entrepreneurs. He leads its efforts to promote social entrepreneurship, as well as its choices of responsible policies and practices to meet strategic objectives. He holds a Master's in Public Administration from Harvard Kennedy School and is a guest lecturer at McGill University's Desautels Faculty of Management.

Tom Redl is the President & CEO at CHANDOS Construction, a market leader in the provision of value-added construction solutions out of Edmonton. Tom is involved in several community initiatives, serves as an instructor in U of A's school of business and has a client-focused vision for CHANDOS that considers both internal and external partners.

“The blind pursuit of profit at all costs is untenable. It is essential that we make money the right way. After all, if communities suffer as a result of a company’s actions, those returns are not sustainable.”

Indra K. Nooyi, PepsiCo

BREAK-OUT SESSION B 11:00AM



Human-Centered Design for Social Impact

Danielle Gibbie - Acumen

Erin Poeta - Acumen

Danielle Carruthers - Acumen

This hands on Acumen session will introduce you to the concepts of human-centered design and how this approach can be used to create innovative, effective, and sustainable solutions for social change. This course has been created to reach those who are brand new to human-centered design, so no prior experience required.



Financial Inclusion & Development

Panelists:

Angie Redecopp - Ambrose University (Moderator)

Ed Temple - Opportunity International Canada

Joan Farkas - City of Calgary, Financial Empowerment Collective

Rogério Olivereira - Yunus Social Business Brazil

Why is financial inclusion so important for development? Learn about global initiatives and a local project.

BREAK-OUT SESSION B - 11:00AM



Economic Development as Part of Community Development

Derek Cook - Canadian Poverty Institute

Court Ellingson - Calgary Economic Development

Learn about building a stronger Calgary through economic development and best practices with respect to direct poverty alleviation in Canada. How do these approaches build upon each other?

Derek Cook has over twenty-five years of experience developing policy and programs and delivering services in the public and non-profit sectors. He is a registered social worker, was the Executive Director of the Calgary Poverty Reduction Initiative and is now the Director of the Canadian Poverty Institute at Ambrose University.

Court Ellingson joined Calgary Economic Development in 2014 and is their VP of Research and Strategy. He works with government, non-profit and the private sector on the implementation of Building on our Energy: The 10-year Economic Strategy for Calgary. He holds a Bachelor of Commerce degree and in 2008 to 2014 he has worked in community economic development as a Sr. Consultant with Millier Dickinson Blais (currently MDB Insight).



Never doubt that a small group of thoughtful committed citizens can change the world. Indeed, it is the only thing that ever has." ~ Margaret Mead

BREAK-OUT SESSION B - 11:00AM



Bridging the Gap Between Aboriginal & Mainstream Businesses

Dr. Wilton Littlechild - Truth & Reconciliation Commissioner

Sandra Sutter - Tarpon Energy

Colby Delorme - Imagination Group

What does the Truth and Reconciliation Commission mean for Calgary businesses? How can mainstream Calgary businesses engage more effectively with their Aboriginal business colleagues? Learn from a community member involved with the TRC and a local Aboriginal entrepreneur.

Wilton Littlechild, Ph.D., is a Cree chief, residential school survivor, and lawyer who has worked both nationally and internationally including with the United Nations to advance Indigenous rights and Treaties. He has also – through leadership with the Truth and Reconciliation Commission – raised awareness of former Canadian policies that decimated the livelihood and culture of Indigenous Canadians.

Sandra Sutter, a Cree Metis woman from the Prairies, is the Aboriginal Partnerships Manager for Tarpon Energy Services and CGT Industrial and the Executive Director for the Circle for Aboriginal Relations (CFAR) Society. She has been involved in the financial, utility, non-profit, accounting and oil and gas sectors in her professional and volunteer life since moving to Calgary in 1988. Sandra is a life long learner with a deep passion for Indigenous community.

Colby Delorme is the President of The Imagination Group of Companies. An entrepreneur since the age of 18, he created and operated two successful companies before the age of 21 and joined The Imagination Group of Companies in 2002.

BREAK-OUT SESSION B - 11:00AM



Nothing About Us Without Us!

Darrell Howard - Vibrant Communities Calgary (Moderator)

TracyRay Lewis - Poverty Talks

Nigel Kirk - Poverty Talks

Randy Pages - Poverty Talks

The input people most directly affected by solutions to an issue - those with lived experience - is critical in the development and implementation of effective solutions. For years, Poverty Talks! has provided valuable input on public policy matters, social issues and more recently, the implementation of Enough for All, Calgary's poverty reduction strategy. Effective businesses engage their stakeholders in helping to solve service issues. Come to hear firsthand experiences, successes and challenges of ongoing meaningful engagement.

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FOLLOW-UP ACTIONS

FORUM CAFE

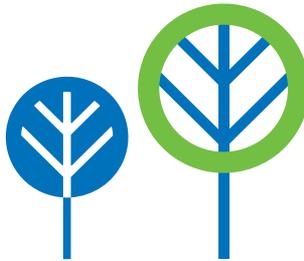


**Saturday, October 1
Over lunch**

*Most people would rather die
than think: many do.*
Bertrand Russell

We plan to ask new and better questions at the Forum Café, which will take place over part of the lunch break at this year's Soul of the Next Economy Forum.

Do you have a new and better question about responsible business, social entrepreneurship, effective international development, innovation & social change or other Forum-related topics?



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FOLLOW-UP ACTIONS

For entrepreneurs: a new tool to manage everything that matters

For entrepreneurs who are proud that their companies are a beneficial presence in the lives of their employees and communities, BDC is promoting a new business tool called Measure What Matters. The free, online confidential questionnaire assesses how your company is run and its impact on employees, community and the environment.

Craig Ryan is Director of Social Entrepreneurship at BDC, the only bank in Canada devoted exclusively to entrepreneurs. He explained the Measure What Matters tool.

What is it?

What is the Measure What Matters tool?

It's a questionnaire that quickly assesses – and gives you – the overall health of your business from five different perspectives: purpose, social and environmental performance, accountability and transparency. This is broader and so more comprehensive than typical financial assessments.

How does it work?

You go to bdc.ca and to the Measure What Matters link. There, you give some basic information about your company and answer some questions. Once completed, your answers are compared to 40,000 other businesses worldwide. You then receive a summary report which shows where you are above and below average. It takes about 20 minutes.

What are the benefits?

There are two big ones. One, you'll learn how you can measure everything that matters to you as a business person: how well you're running your company and its impact on society around you. Two, you'll see how your company compares with its peers.

Do I have to pass?

No. Whatever your score, you get the benefits!

How big is the movement?

More than 40,000 companies in 50-plus countries have used the assessment.

Is this a new kind of entrepreneur?

No. Most are simply people who are proud their company is a beneficial presence in the lives of their employees and communities. We also see people who innovatively use business to solve social and environmental problems. All are impressive!

It's a sociocultural movement—a new mindset about company purpose.

Why is this so exciting?

It's exciting because it's powerfully transformative: a movement that's better for workers, the community, the environment and company performance.

What's next?

If I want to go further, what might I do?

You can seek certification as a Beneficial corporation (B Corp). Its assessment is the basis of the Measure What Matters tool.

B Corp is to business what Fair Trade is to coffee or LEED is to green buildings. These are for-profit companies that meet rigorous standards of purpose, social and environmental performance, accountability and transparency.

Should I successfully certify as a B Corp, what are the benefits?

There are plenty. B Corps attract people who want to buy from, work at or invest in companies that work to improve society. It's marketing and social media gold. Finally, you enter a group of like-minded people who seek to do business with each other.

Is BDC a B Corp?

Yes, we are! And very proud of it.

For further information contact:

craig.ryan@bdc.ca



BDC is a Certified B Corporation

BDC is the only bank dedicated exclusively to entrepreneurs. BDC is also the first Canadian financial institution to receive B Corp certification and the 100th Canadian company to join the global community of B Corps. To learn more about BDC's role in supporting social entrepreneurs, **visit our website at www.bdc.ca/bcorp.**

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THE MYTHS OF CONSCIOUS CONSUMERISM

By Phillip Haid

It would seem we can't go a week these days without seeing a new brand campaign using social purpose to help sell a product. Whether it's Honey Nut Cheerios saving the bees, Always promoting the power of girls or Whole Foods selling ugly fruits and vegetables to combat food waste, social purpose has become the fifth "P" in the marketing arsenal.

This trend is part of a larger growing movement called "conscious consumerism" whereby shoppers look to purchase products that are healthier, more environmentally friendly and in some instances driven towards generating community impact. Led in great part by the millennial shopper, there is a growing belief that when you shop, you can also cast a vote for the type of world you want to live in.

Underlying this shift towards a more socially conscious world are two slightly contradictory myths that need to be dispelled for good.

Myth #1: Consumers will pay more for products that are made in an ethical fashion and/or create positive social and environmental benefit.

There is countless polling data that tells us people will pay more for products with an ethical and social bent. For example, Nielsen's Global Survey on Corporate Social Responsibility states that "55% of global online consumers are willing to pay more for products and services provided by companies that are committed to positive social and environmental impact."

And Cone Communications' Social Impact Study states that "89% of U.S. consumers are likely to switch brands to one with a cause, given comparable price and quality."

Here's the rub: People's purported behaviour rarely matches their actual acts. Nielsen data also shows that only 15% of Canadian households purchase 100% recycled products. The reason is that consumers almost always go for price and quality first, not social

impact.

The implication of this is significant. The conscious product has to be first and foremost a great product if it wants to be successful. If it is, the social component is the added bonus that can help grow the brand and build a loyal customer base. But social purpose on its own will not appeal to a wide enough audience base (today) and it should not be used to cover over the flaws of the product.

Myth #2: Buying “good products” is a superficial way to create social change.

The purist argument, made by those that believe consumerism is problematic and brands are not sincere in their social intent, goes like this: if you want to create social impact the best way to do it is by supporting a charity, not purchasing a conscious product where only a portion of proceeds benefit the cause.

This argument is flawed, because it is rooted in an old-fashioned charity mindset and model that believes business and social impact objectives cannot co-exist to create a true “win-win” at a much larger scale.

The reality is that there are many global businesses today that are leading the way to a more scalable and impactful world and conscious consumerism is one of the ways to get there.

Here are just some examples:

Tesla is inspiring a new generation of electric vehicles buyers while helping

to reduce the impact of CO2 emissions.

Impossible Foods serves a delicious hamburger made from plants, revolutionizing the impact of cattle on our personal health and that of the planet.

Uncharted Play has developed a soccer ball called the Soccket that generates electricity while playing it, helping to provide light to families in refugee camps.

Grameen Danone makes a nutritious yogurt packed with nutrients to combat malnutrition in the developing world.

Eyewear maker Warby Parker helps to restore eyesight and provide jobs to people in the developing world.

Dave’s Killer Bread, based in Oregon, offers bread that helps to reduce recidivism rates for people who have been incarcerated by providing them with meaningful jobs.

G Star Raw sells jeans made out of plastic removed from the oceans, while Levi’s has revolutionized “waterless jeans” that reduce water consumption at every step of the production process.

And Toronto-based footwear brand Alice & Whittles has created an ethically sourced high-end fashionable rubber boot that has significantly improved the entire supply chain, improving lives for the workers and the planet.

(Cont’d next page)

These examples are only the tip of the iceberg when it comes to products that generate “profit and purpose.”

In every example the product is great, the social purpose is sincere, the impact is real and the consumer is not asked to pay more (unless it is a high-end product). As a result, each brand is playing a major part in creating social change at scale.

This is the power of conscious consumerism. It’s a trend that will continue to grow as brands and consumers recognize that business and social objectives are mutually beneficial.

Also hear what Philip has to say about Why Embracing Profitable Good – Not CSR – Will Help You Stay Ahead at www.profitguide.com.

“Courage is what it takes to stand up and speak; courage is also what it takes to sit down and listen.”

Winston Churchill

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FOLLOW-UP ACTIONS

WHY YOUR BOARD SHOULD CARE ABOUT SUSTAINABLE DEVELOPMENT

By Helle Bank Jorgensen

Do corporate boards care about the Sustainable Development Goals? The answer is, of course, that it depends who you ask.

Awareness and interest in embracing the Sustainable Development Goals (SDGs) at the board level might be much more prevalent than mid-level managers think.

According to the newly released Global Opportunity Report 2016, 32 percent of CEOs surveyed were aware of the SDGs, and 23 percent say that they are fully aware and are planning a response.

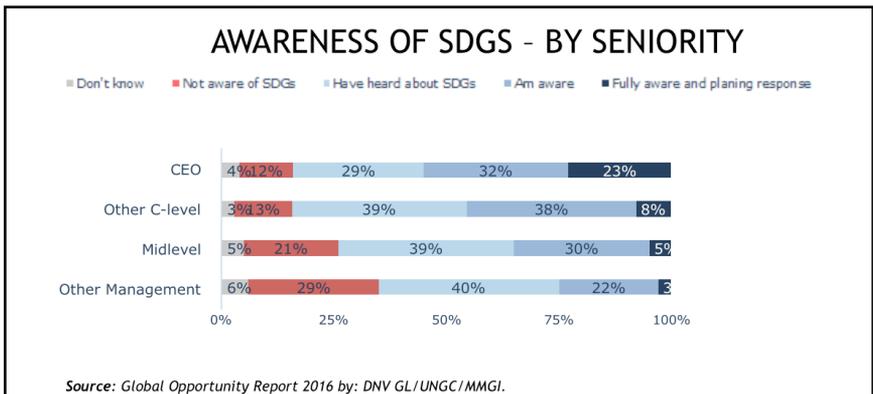
However, CEOs are the frontrunners. Awareness levels and planning preparedness seems to decline down the management chain, with only 5 percent of mid-level management being fully aware and planning a response to

the SDGs.

Much can be said about how surveys are conducted, but I'm not surprised by the findings of the Global Opportunity Report. It echoes my own discussions with several board members and CEOs. Although the above-mentioned survey was not directed at board members, it is often the case that a CEO also serves on one or more corporate boards.

Still, the data does show a huge need to translate the SDGs into business action and innovation if the Agenda 2030 intends to be more than just commitments and a set of great goals.

Perhaps it is because of this that U.N. Secretary General Ban Ki-moon in January called on the U.N. Global Compact (UNGC) to play a role with business in implementing the SDGs.



As the world's largest voluntary corporate sustainability initiative, based on CEO commitments from over 13,000 businesses and organizations, many UNGC companies were involved in the process of shaping and determining the targets for the SDGs.

If any organization should have a convening power, it must be the world's largest CEO-backed responsibility initiative — and one already active in encouraging board actions through the U.N. Global Compact Board Program.

FROM AWARENESS TO ACTION

Being aware of the 17 SDGs is not the same as knowing how to respond and embed sustainable thinking into business strategy and daily execution.

I have heard more times than I want to count that "17 goals are way too many."

My answer is often that companies I have worked with during my long career have many more than 17 strategic, financial, environmental, social, intellectual and innovation goals — and that the SDGs are not new goals, but a guideline for doing better business that hopefully can support or inspire innovation on social and environmental challenges.

Unilever global chairman Michael Treschow, whom I recently interviewed for a podcast, said, "It isn't about 'doing it all.'" According to Treschow, "these 17 Sustainable Development Goals address the most important economic, social, environmental and governance challenges of our time and include something for everyone."

It is essential, not only to companies but to the legacy of the leaders of today, that companies have a purpose beyond being profitable — a purpose that also will help achieve the 2030 sustainable development agenda and all or some of the 17 goals.

No doubt that the nature of oversight and license to operate for business has changed in the past years. Treschow called it "an evolutionary process," where more and more pressure related to sustainability has been put on boards of directors with new regulations and public call for greater transparency, accountability and better governance. (It is no secret that Unilever has chosen to embrace the process and has won much respect and a market advantage with its Sustainable Living Plan.)

With this in mind, it seems like a no-brainer that boards of directors should care and ensure that sustainability is integrated into the corporate strategy — as well as into the execution plan and incentive schemes.

"Being a respected and trusted company is a moving target."

However, being a respected and trusted company is a moving target. What was an unthinkable responsibility 25 years ago can today put a board member behind bars. And it seems, as the late Interface chief Ray Anderson said in 1999, "in the future, people like me will go to jail," referring to the

(Cont'd next page)



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potential ramifications of "plundering of the earth."

Even though boards today are increasingly aware of the environmental and social impact their decisions are having — and that there are 8 times the number of non-financial disclosure regulations today than just two years ago — only 42 percent of the 2,500 global executives and managers asked by Sloan, BCG and UNGC in 2015 saw their boards even moderately engaged with the sustainability agenda.

This is a risk, not only for the companies and the board members themselves, but also to society and future generations to whom we leave the planet, without doubt, in a worse condition than when it was given to us by our parents.

Boards are the most powerful vehicles we have in the corporate world — and some will say in the entire world. Board members therefore need to live up to their responsibility and

set a higher standard with which to help inspire their our own employees, customers and suppliers, as well as the society to buy into what Unilever calls "a Sustainable Living Plan" that respects planetary boundaries.

To accelerate the transformation from good to great, we need to be able to have boards everywhere understand the increasing amount of risks and opportunities — and start to take action.

A second step would be to map the SDGs to the current strategic risks and opportunities and the integrate into the strategy, incentives and ongoing execution oversight.

Helle has several other articles available online, including Women-owned business: A niche market or vehicles for change? in GreenBiz on September 22, 2016.



How Can Companies Succeed by Helping the World Not to Fail

Today, businesses cannot succeed in a world that is failing - it is in their best interest to ensure that social and environmental challenges are addressed and the Sustainable Development Goals (SDGs) are a vehicle for companies to address these social and environmental challenges!

Helle Bank Jorgensen Global Compact Network Canada

Global Compact Network Canada - Helle Bank Jorgensen is the president of Global Compact Network Canada and is a globally recognized expert on how to combine sustainable development and successful business. She is a Board Facilitator for the UN Global Compact Board Program and is the CEO & Founder of B.Accountability and the chair of eRevalue.

A special thanks to Calgary Economic Development for helping to fund this session.



**Thanks DIG
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FEATURE SESSION C 2:00PM



First, Do No Harm

Whether you are a business, NGO or an individual, involved in community development, we all want to help people. Sometimes though we inadvertently do harm. Learn more about common pitfalls and best practices when engaging in international in international development projects.

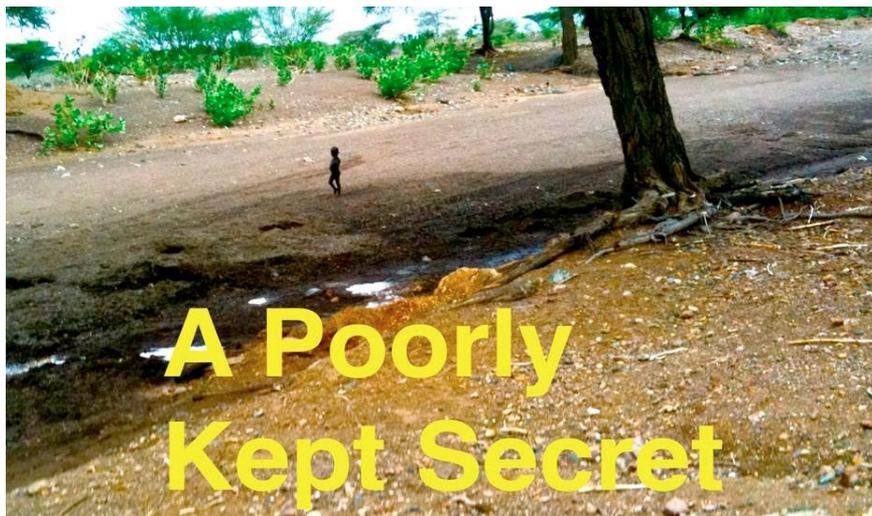
Mark Crocker Stopover

Mark Crocker is the founder of Stopover and practices in the field of Sustainable Community Development.

Mark trains people to work in a new culture and help alleviate poverty. For over 25 years he has trained 10s of thousands of volunteers to head overseas and make a difference.



FOLLOW-UP ACTIONS



By Mark Crocker

Wells have been installed all over the world by organizations that collected donation money from people just like you. A lot of pictures are sent back home of the big celebration, unveiling of the plaque and congratulatory speeches. This is usually the last we hear of the well.

Job Well Done!

Another Broken Well

The problem is that the pumps were broken by some local kid and haven't worked in years.

The first time I saw this kind of thing (and it is not that uncommon) I thought, what is wrong with these people? They have to walk for kilometres for water, often to polluted streams, and this pump is just sitting there at their doorstep – Why don't they fix it?

Don't they care?

If someone gives you a gift shouldn't you keep it up?

That is a fairly obvious isn't it? Is this some sort of moral deficiency or "cultural" issue ... I tried to come up with all kinds of explanations. Most of them were convoluted and sort of racist, but over time I think I am starting to understand why.

The answer is the people did not realize the pump was theirs

In too many cases, no one knew who actually owned the pump. Sure it was given to 'the community' but it was never clarified who that actually was. It is like the road in front of your house, it is "yours" but you don't fill the potholes. When it is given to everyone, it is given to no one.

No one owns the well.

Everyone else assumed someone else owned it. When the outsiders came in with the water in the first case it is

usually enormously appreciated, but because no one actually owned the pumps, and no one collected money for maintenance, it meant that no one was in charge.

The pump is most commonly seen as a broken promise and a failed responsibility of the donating agency

Whenever I saw a broken well, I started to ask a simple question, “Whose well is this?” I had hoped to hear people tell me that this is “my well”. Instead I heard over and over that “this is the well of [insert name of your favourite development agency here]”.

Changing ownership

Why does the community think the well belongs to an outsider? Probably because an outsider brought it in and even though they most certainly told the local people it was theirs, words don’t mean as much as action.

And their actions clearly showed that this well was not theirs. At no point was the well actually given to anyone with an enforceable interest in maintaining the well.

No thanks!

Consider if you were suddenly told by a friend, colleague or pastor that the work that they have done for the past year is now yours. And – “oh yeah, by the way, the money run out in 6 months so you need to make sure that you find a way to keep it going ...” How would you feel?

You may feel a lot like many recipi-

ents around the world feel when they receive one of our projects. Sure, I like this project, but I like it as a user, a recipient, not an owner. Why are you trying to pass this time-consuming and expensive responsibility on to me?

When wells are given to a community and not to an owner (person or team)- no one owns the well.

If you form vague requests for maintenance schedules but avoid the plans for a person to make an income from his work – no one owns the well.

When there is no clear system in place, everyone expects that the company who brought the water will manage their investment, collect fees and repair the breakdowns.

If you don’t want another broken well For a project to last in a community, the community must own it at all times. From long before the planning phase, to long after you are gone. How do you make sure of real ownership? Simple.

Don’t do the kinds of things that owners do.

If you dream it, plan for it, pay for it, manage it and sell it to the community ... guess who the owner is? You, of course. Do something different instead, find out the dreams, plans, resources, management and promotion of the community and join what they are doing.

Have you ever been frustrated by a big waste of money?

LION'S DEN SOCIAL INNOVATION CHALLENGE



The Soul of the Next Economy Forum is partnering with **Social Innovation Challenge** and **Thrive Calgary** to bring you the 2nd Lion's Den Social Innovation Challenge.

The Lion's Den Social Innovation Challenge is a unique opportunity that brings together change makers, mentors, and funders – all focused on bettering society.

Part One – The Lion's Den Pitch @ the Forum 1:30-3pm, Saturday, Oct 1

Listen to 90 second pitches from the contestants. The top 8-10 finalists will be chosen based on input from the audience and from a panel of experienced innovators. The finalists each receive \$150, further business training and direct coaching from their own personal gurus.

Part Two – The Ultimate Social Innovation Challenge 7-9pm, Tuesday October 18

The finalists present their proposals to panelists and funders.

1st Place

Prizes valued at over \$6000

- \$1500 cash from the United Church of Canada Foundation
- Datawind Tablet
- IP Consultation Package from Innovate Calgary
- \$1200 in legal templates from Clausehouse
- \$500 social media course from CanadaHelps
- Free business banking from ATB Financial
- Business mentoring from Social Mentor Network
- E-learning from Small Business Solver

2nd Place

Prizes valued at over \$3000

- \$1000 cash from the United Church of Canada Foundation
- Datawind Tablet
- Free business banking from ATB Financial
- Business mentoring from Social Mentor Network
- E-learning from Small Business Solver

Bonus Quadruple Bottom Line Prize: \$1000 cash from Glenco Foundation

3rd Place

Prizes valued at over \$2500

- \$500 cash from the United Church of Canada Foundation
- Datawind Tablet
- Free business banking from ATB Financial
- Business mentoring from Social Mentor Network
- E-learning from Small Business Solver

LION'S DEN SOCIAL INNOVATION CHALLENGE

Funding may be available for successful proposals from Calgary and area social innovation supporters. Thank you to our panelist & funders group which includes: St. Andrew's United Church, United Church of Canada Foundation, Trico Charitable Foundation, Calgary Arts Development, Futurpreneur Canada, and Innovate Calgary.

Thank you also to our Expert Panel – new this year – for being available to our finalist to share their expertise leading up to the Ultimate Social Innovation Challenge. This includes Collins Barrow Calgary, Innovate Calgary, Creating Eudaimonia, Norton Rose Fulbright and ATB Financial!

Thank you to our prize sponsors, final panel members & funders:



Thank you to our Lion's Den Pitch Panelists:

Carla Heim, Business Development Bank of Canada
Jordana Armstrong, Innovate Calgary
Philip Lozano, Momentum
Hannah Cree, ATB Financial
Leighton Healey, Launch Calgary

Thank you to our Business Gurus:

David Wu, Brion Energy
Usman Tahir Jutt, Chirp Food / Strathmore McDonalds
Aman Adata, Eat Naaco
Danielle James, Hillhurst United Church
Lloyd McDonald, Pinnacle Wealth Brokers
Leighton Healey, Launch Calgary
Jeremy Bryan, Mealshare
Chas Young, Momentum
Kristen Lawson, Bethany Care Society
Sandra Bjurstrom, Vee Nanotech / CORE Entrepreneur Support

Thank you to our Pitching Coaches:

Karen Whiteman, Alberta's Promise
Brenda Blake, Momentum

THE FIG TREE FOUNDATION is a Calgary-based volunteer driven organization committed to aiding disadvantaged populations by assisting the local organizations we work with. We cultivate collaboration between non-governmental charitable organizations and offer financial support for projects and programs that align with our funding criteria.



figtreefoundation.org

Interested in learning more on topics and issues addressed during the Forum?

We have put together a list of some recommended reading and videos on CSR, social enterprise, microfinance, and sustainable development. Many of these have been recommended by the committee, presenters and exhibitors from the Forum.

CSR / BUSINESS WITH PURPOSE

A New Psychology for Sustainability Leadership: The Hidden Power of Ecological Worldviews, S. Schein, 2015. (Randy Poon, Ambrose University)

Corporate Responsibility Coalitions: The Past, Present, and Future of Alliances for Sustainable Capitalism, D. Grayson, J. Nelson, 2013. (Randy Poon, Ambrose University)

Generation of Businesses Will Win, Jeffrey Hollender, Bill Breen, 2010.

Leveraging Corporate Responsibility: The Stakeholder Route to Maximizing Business and Social Value, C.B. Bhattacharya, Sankar Sen, Daniel Korschun, 2011.

Mission in a Bottle: The Honest Guide to Doing Business Differently – and Succeeding, Seth Goldman, Barry Nalebuff, Sungyoon Choi, 2013. (WeEmploy Inc.)

Responsibility Revolution: How the Next Generation of Businesses Will Win, Jeffrey Hollender, Bill Breen, 2010.

RIA Guide to Responsible Investing – riacanada.ca/guide-to-ri/, 2015. (Patti Dolan, Dolan Wealth Management | Raymond James)

Screw Business As Usual, Richard Branson, 2011. (WeEmploy Inc.)

The Age of Responsibility: CSR 2.0 and the New DNA of Business, W. Visser, 2011. (Randy Poon, Ambrose University)

The B Corp Handbook: How to use Business as a Force for Good, Ryan Honeymoon, 2014 (Craig Ryan, BDC)

The Good Jobs Strategy, Zeynep Ton, 2014. (Franco Savoia, Vibrant Communities Calgary)

Why Business Matters to God: And What Still Needs to be Fixed, J. R. Van Duzer, 2010. (Randy Poon, Ambrose University)

Zeronauts: Breaking the Sustainability Barrier, John Elkington, 2012.

SOCIAL INNOVATION

A Fistful of Rice: My Unexpected Quest to End Poverty Through Profitability, Vikram Akula, 2011.

Agent of Impact: Inspire the Masses & Influence Change with Your Mission-Driven Business, Megan Atkinson, 2014. (Hannah Cree, ATB Financial)

READER'S CORNER

Bright Lights, No City: An African Adventure on Bad Roads with a Brother and a Very Weird Business Plan, Max Alexander, 2012.

Building a Social Business: The New Kind of Capitalism that Serves Humanity's Most Pressing Needs, Muhammad Yunus, 2011.

Getting to Maybe: How the World is Changed, Westley, Quinn & Zimmerman, 2006 (Vibrant Communities Calgary)

Social Entrepreneurship for Dummies, Mark Durieux, 2010.

Start Something That Matters, Blake Mycoskie, 2011.

The Coming Prosperity: How Entrepreneurs are Transforming the Global Economy, Philip Auerwald, 2012.

The Local Economy Solution, Michael Shuman, 2015 (Vibrant Communities Calgary)

MICROFINANCE

A Billion Bootstraps: Microcredit, Barefoot Banking, and the Business Solution for Ending Poverty, Phil Smith, 2007.

Banker to the Poor: Micro-Lending and the Battle against World Poverty, Muhammad Yunus, 2008.

Half the Sky: Turning Oppression into Opportunity for Women Worldwide, Nicholas D. Kristof, 2010.

More than Good Intentions: How a New Economics is Helping to Solve Global Poverty, Dean Karlan, 2011.

The Blue Sweater: Bridging the Gap Between Rich and Poor in an Interconnected World, Jacqueline Novagratz, 2010.

SUSTAINABLE DEVELOPMENT

Abundance: The Future is Better than You Think, Peter H. Diamandas, Steven Kotler, 2014.

Beyond Fair Trade, Mark Pendergrast, 2015 (Fair Trade Calgary)

Damned Nations: Greed, Guns, Armies and Aid, Samantha Nutt, 2011 (Vibrant Communities Calgary)

Dead Aid: Why Aid is Not Working and How There is a Better Way for Africa, Dambisa Moyo, 2010. (Paul Gomes, Fig Tree Foundation)

Don't Even Think About It: Why Our Brains are Wired to Ignore Climate Change, George Marshall, 2014. (Dr. Bob Dickson, Oikocredit)

Poor Economies: A Radical Rethinking of the Way to Fight Global Poverty, Abhijit V. Banerjee, Esther Duflo, 2011. (Angie Redecopp, Ambrose University)

Poverty in Canada, Dennis Raphael, 2011. (Franco Savoia, Vibrant Communities Calgary)

Scarcity: Why Having too Little Means so Much, Sendhil Mullainathan, Eldar Shafir, 2013. (Franco Savoia, Vibrant Communities, Calgary)

The Bottom Billion: Why the Poorest Countries are Failing and What can be Done About It, Paul Collier, 2008. (Paul Gomes, Fig Tree Foundation)

The Locust Effect, Gary A. Haugen, 2014. (Phil Calvert, International Justice Mission Canada)

The Tipping Point, Malcolm Gladwell, 1999. (Ian White, CTV News)

The White Man's Burden: Why the West's Efforts to Aid the Rest Have Done so Much Ill and so Little Good, William Easterly, 2007. (Paul Gomes, Fig Tree Foundation)

The World is Flat: A Brief History of the Twenty-First Century, Thomas L. Friedman, 2005. (Ian White, CTV News)

When Helping Hurts, Corbett, Kikkert, Perkins, 2009.

COLLABORATION

Collective Impact, J. Kania, M. Kramer, 2011. (Randy Poon, Ambrose University)

Culture of Collaboration: Maximizing Time, Talent and Tools to Create Value in the Global Economy, Evan Rosen, 2009.

Dialogue: The Art of Thinking Together, William Isaacs, 1999. (Jill Andres,

MRU's Institute for Community Prosperity)

Macrowikinomics: New Solutions for a Connected Planet, Don Tapscott and Anthony D. Williams, 2012.

Nice Companies Finish First: Why Cut-Throat Management is Out and Collaboration is In, Peter Shankman, 2013.

The Bounty Effect: 7 Steps to the Culture of Collaboration, Evan Rosen, 2013.

What's Mine is Yours, Rachel Botsman, 2010.

VIDEO PICKS

Black Gold
Bonsai People
Girls Rising
Life & Debt
Poverty Inc.
Rural Internet Kiosk
The Dark Side of Chocolate
The End of Poverty?
What are We Doing Here?
Why Poverty?

Check out *Ted Talks* by these authors and on these topics. Try Dan Pallotta's *The Way We Think about Charity is Dead Wrong*

WRAP-UP PLENARY

Now What...

As you complete your time at Soul of the Economy Forum 2016, please take a few minutes to reflect...

Who are you going to connect with in the coming weeks?

What are some books you are going to read or topics you are going to learn more about?

What specific actions you are going to take – either within your own organization or with others that you might collaborate with?

Thank You

- ... to our keynote speakers and emcee for challenging and inspiring us
- ... to our presenters, moderators and panel members for sharing their ideas and experiences and prompting us to think in new directions
- ... to our CSR Roundtable hosts & moderator and Forum Cafe hosts for leading the way
- ... to our exhibitors for sharing their passion about the organizations, companies and causes they represent
- ... to our community partners and sponsors for donating their resources to make this all possible
- ... to our Ambrose student volunteers for giving their time and energy
- ... to our Lion's Den contestants, sponsors and supporters for being change makers
- ... to you for taking the time to learn, connect and engage**

Thanks also to our advisors for their valuable input:

Barb Davies	Momentum
Ivan Sierralta	Vibrant Communities Calgary
Jim Shore	First Calgary Financial
Bill Fitzsimmons	Inland Concrete
Bob Schulz	U of C Haskayne
Houston & Rosalynn Peschl	Creating Eudaimonia
Court Ellingson	Calgary Economic Development
Matt Mayer	Conscious Brands
James Stauch	MRU's Institute for Community Prosperity
Vern Albush	Servus Credit Union
Derek Fraser	iDophilanthropy
Leighton Healey	Launch Calgary
Stephanie Jackman	REAP

A special thanks to the core planning committee who worked together to bring this Forum to you:

Patti Dolan	Dolan Wealth Management Raymond James
Paul Gomes	Fig Tree Foundation
Paul Harvey	Fig Tree Foundation
Barbara Leist	Ambrose University
Nicholas Newnes	Ambrose University
Randy Poon	Ambrose University
Angie Redecopp	Ambrose University
Franco Savoia	Vibrant Communities Calgary



Soul of the Next Economy Forum 2016

The Soul of the Next Economy Forum is where the non-profit sector, government, business and educational institutions converge. People come together to:

- **learn** about local and global social and development issues
- **connect** with peers, industry experts and other sectors addressing these issues
- **engage** in sustainable business oriented solutions to these issues, fueled through innovation, collaboration and corporate social responsibility



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Register for Soul of the Next Economy Forum 2017

We look forward to seeing you September 29 & 30, 2017!

Limited super early bird tickets available for \$79!

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